



# Public Policy Forum

Impartial research. Informed debate.

## **Public Policy Forum Strategic Plan** Adopted December 9, 2014

### **Our Mission**

We seek, discover and disclose true and accurate information to enhance the effectiveness of government and public policy in southeastern Wisconsin; and we facilitate public policy discussion and action.

### **Our Vision**

Our vision is for a southeastern Wisconsin that is socially and economically healthy, and that deals decisively, responsibly and in a timely manner with public issues. We will be the indispensable resource for objective research and analysis to guide and shape public policy. Toward that end, we are committed to:

- **Impartiality.** We provide information about public issues that can be trusted because we follow a rigorous and dispassionate conduct of inquiry in obtaining it.
- **Quality.** We provide accurate and balanced information.
- **Visibility.** We actively disseminate information about public issues in order to educate citizens and the media.
- **Leadership.** We help inform leadership, provide direction for policymakers and assist governments in their efforts to serve citizens.
- **Facilitation.** We convene citizens in order to stimulate debate about issues and call attention to relevant research.
- **Inclusiveness.** We promote an inclusive atmosphere in public policy by diversifying our leadership, membership and staff with respect to geography, ethnicity, gender and age.
- **Education.** We teach citizens and their public officials about the content of research on policy and how better to use it.
- **Timeliness.** We conduct timely, proactive research that is topical. We respond to important issues as they surface.
- **Advocacy.** We advocate in favor of ethical governance, vigorous debate on policy issues, research-based decision making, rigorous standards for policy discussion, promoting research results and the truthful and appropriate use of public information. We seek to advocate in an impartial, nonpartisan manner.

## Our Strategic Goals

The Public Policy Forum was created 101 years ago (as the Milwaukee Citizens' Bureau for Municipal Efficiency) to promote efficiency and accountability in local government. Overall, we have remained faithful to that legacy by concentrating our research and facilitation activities on efforts to monitor and strengthen local government performance, and we have addressed topics that directly relate to specific policymaking challenges faced by those entities.

Over the years, in response to requests from key community stakeholders and in our pursuit of a sustainable funding model, we also have taken on policy research topics that are more global and community-focused. While not as directly related to local public sector decision-making, those topics – which are exemplified by research aimed at strengthening the region's economic competitiveness and assessing its state of charitable giving – still have informed policymakers on issues that are directly relevant to the community's well-being.

As the Forum begins its second century, we will restore our focus to our core mission of monitoring and improving local government performance. Our narrower focus does not stem from a disregard or disdain for the importance of researching global policy matters, but from a strong resolve to enhance our effectiveness as an agent for professional and data-driven policy-making in our region. We also recognize that given our resource and staffing constraints, meeting our definition of improved effectiveness will require a narrower focus and a re-dedication of all available staff, board, and member resources to our core mission.

Over the next three years, we will focus on the following strategic objectives:

1. **Produce high-quality and impartial research that is directly relevant to key policy challenges confronting local government bodies and agencies.** Nonpartisan research is our core activity and a key competency that distinguishes the Public Policy Forum from other organizations. We now seek to clarify the focus of our research agenda by emphasizing specific local public policy issues that our expertise and objectivity can help inform and/or resolve. We will prioritize issues and topics that are (or should be) on the immediate policy agendas of local governments, and our research products will be geared toward articulating best practices and methods to improve efficiency, while also producing clear and actionable policy options and recommendations.
2. **Develop new tactics to ensure that our research is making a difference.** The Forum needs to be more proficient and more direct in communicating the results of its research and in challenging decision-makers to heed those results. This means that we must improve our ability to get quality research and information into the hands of people who make decisions, and we must do so in a way that ensures they can easily digest and use it. We also must enhance our efforts to generally communicate our research findings to our members, the media, and the general public. To accomplish these goals, we will spend more time on the packaging and presentation of our research products, and we will be more forceful in articulating the need for policy improvements and the pursuit of policy options contained in our reports.

3. **Build the financial capacity to support our core mission and enhance our communications.** The Forum’s “discretionary funding” – which consists largely of revenue from membership dues, sponsorships, special events, and general fundraising activities – supports much of our day-to-day monitoring of local governments, our annual budget briefs, and our “watchdog-type” reports, as well as communications and dissemination activities. While those activities are critical to *our* mission, they do not typically attract grant and contract funding, which most often is linked to specific projects or areas of research that reflect the mission of the *funder*. We need to build our discretionary funding sources by developing new membership attraction and retention strategies, considering new approaches for general fundraising, strategically increasing pricing for contract research, and securing other means of general operations support. This effort will be buttressed by strategic investment of our 100<sup>th</sup> anniversary fundraising proceeds in ways that will enhance our value proposition and our attractiveness to potential new members and funders.

### **Specific Actions to Implement Our Strategic Goals**

In order to strengthen our organization and implement our strategic goals, we will focus on the following actions over the next three years:

- **Research Capacity.** We will increase our capacity to conduct timely and relevant research that will influence policy decisions in our region. We will do so through the following actions:
  - Re-defining the scope of our research agenda. Our priority research areas will continue to be local government finance/structure, education, and economic development, but we will narrow our focus to include only issues that are directly relevant to local government and school district policy-making in those areas. **Linked to Strategic Objectives 1 and 2.**
  - Revamping our staffing structure to include three senior researchers, each of whom will focus on one of the primary issue areas cited above. Proceeds from our 100<sup>th</sup> Anniversary fundraising will be used to support this effort. **Strategic Objectives 1 and 2.**
  - Employing part-time and contracted research staff who can bring unique skill sets and attributes that complement the skills of full-time staff. Proceeds from our 100<sup>th</sup> Anniversary fundraising will be used to support this effort. **Strategic Objectives 1 and 2.**
  - Formalizing personnel policies and practices that establish clear expectations and measurable accountabilities for research staff in terms of output and performance. Strategic Objectives 1 and 2.

- **Research Impact.** We will strengthen the impact of our research and our insistence on data-driven public policy decision-making through the following actions:
  - Presenting clear and actionable policy recommendations or policy options when our research findings compel us to do so. Where appropriate, our research products also will emphasize best practices used in other metro areas and how those practices specifically could be applied in our region. **Strategic Objectives 1 and 2.**
  - Enhancing our use of data visualization, multiple forms of media, and other strategies that will make our research products more accessible, attractive, and digestible to greater numbers of policymakers and citizens. **Strategic Objectives 2 and 3.**
  - Devoting additional staff resources to regular follow-up on our policy recommendations and insights. This follow-up may include reports or research briefs that detail progress on policy matters raised by our research, use of our policy blog to comment on such progress, and development of scorecard-type mechanisms to report such progress to the public. **Strategic Objective 2.**
  - Seeking additional opportunities to present our research to government bodies, business and civic organizations, neighborhood groups, and our members. Each member of our research staff will be expected to pursue and take part in such opportunities. **Strategic Objectives 2 and 3.**
  - Ensuring that our programs are relevant, timely, provocative, and supportive of concrete action. **Strategic Objectives 1, 2, and 3.**
  
- **Communications and Marketing.** We will place renewed emphasis on effectively communicating our research findings and marketing our organization as the indispensable source of nonpartisan public policy research in our region. We will do so through the following actions:
  - Building into the timetable for each major research product sufficient time to consider and include mechanisms for making the product more accessible, attractive, and understandable to policymakers and citizens. **Strategic Objectives 2 and 3.**
  - Making greater use of modern communications technologies and Trustees to disseminate our research to wider audiences and make it more interesting to those audiences. **Strategic Objectives 2 and 3.**
  - Devoting more time not only to publicizing our research findings, but also to regularly communicating the extent to which those findings are being pursued and implemented by local decision-makers. **Strategic Objective 2.**

- Identifying the means to hire a communications/marketing consultant or intern, and/or strategies for freeing up the time of the President and Director of Operations to perform additional marketing and communications activities. Proceeds from our 100<sup>th</sup> Anniversary fundraising will be used indirectly to support this effort. **Strategic Objectives 2 and 3.**
- **Discretionary Revenue Growth.** We will increase the proportion of our revenue budget that is not linked to project-based grants and contracts through the following actions:
  - Revitalizing our Membership Committee and using it to target new prospects, re-define our value proposition, and develop new marketing tools. **Strategic Objective 3.**
  - Asking and expecting our Trustees to be more actively engaged in membership recruitment and in the identification and implementation of new fundraising strategies. **Strategic Objective 3.**
  - Hiring a part-time administrative staff person to relieve the President and Director of Operations from administrative duties and free up more of their time for membership and fund development activities. **Strategic Objective 3.**
  - Evaluating the potential of new fundraising strategies, including an annual or bi-annual gala dinner or other special events. **Strategic Objective 3.**
  - Strategically pricing our contract research to ensure that we are not using discretionary resources to subsidize projects that other entities will willingly pay us to conduct. **Strategic Objective 3.**
  - Seeking additional opportunities for operations grants and grants that broadly support our research activities in one of our three priority areas. **Strategic Objectives 1, 2, and 3.**

**Assuming success in our efforts to grow our discretionary funding base and achieve our other strategic objectives over the next three years, we also envision pursuit of the following actions within a three- to five-year timeframe:**

- We will seek to further enhance our research capacity and impact by hiring a highly-credentialed researcher with specific expertise in education or economic development to lead that segment of our research portfolio. This researcher ideally would have extensive academic, research, and/or government experience and also could serve as Research Director.
- We will seek to further enhance our communications and fundraising prowess by hiring a Chief Operating Officer who can share those duties with the President and relieve him of additional high-level administrative duties. This step would be designed to free up more of the President's time to conduct, edit, and disseminate research and to prepare for his succession.

## **Next Steps**

We will take the following actions before October 15, 2014:

1. Share the draft strategic plan with the Executive Committee, Board of Trustees and members. After we receive and incorporate their feedback, we will bring a final strategic plan to the Executive Committee for approval.
2. Re-activate the Membership Committee to develop a plan for membership recruitment and marketing.
3. Hire three senior researchers.
4. Hire a part-time administrative assistant.