



CITIZENS RESEARCH COUNCIL OF MICHIGAN

# Lessons Learned from Strategic Planning: Citizens Research Council of Michigan

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# Citizens Research Council

- Founded in 1916
- Statewide
- Non-partisan
- Private not-for-profit
- Promotes sound policy for state and local governments through factual research – accurate, independent and objective
- Relies on charitable contributions of Michigan foundations, businesses, and individuals
- *[www.crcmich.org](http://www.crcmich.org)*



## Why Did We do a Strategic Plan?

- Retirement of CRC's president in 2009 was a logical transition point
- Focus on ways CRC could help Michigan meet policy challenges (how can we do what we currently do better?)
- Develop strategies to ensure long-term sustainability in face of eroding funding base
- Ensure that everyone was on the same page with respect to mission and what we were trying to accomplish

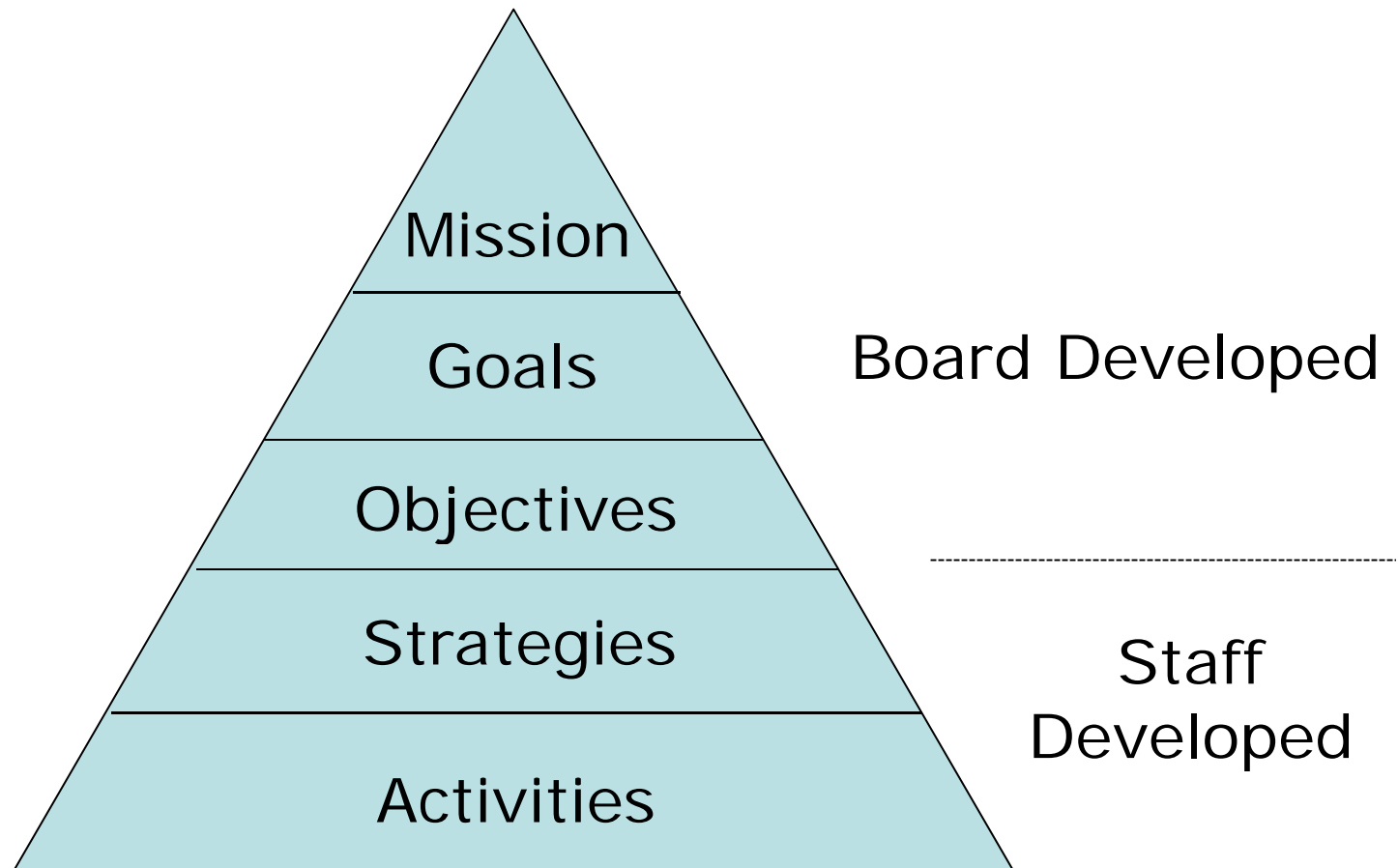


## Resources Used

- Consultant facilitated sessions (total cost to CRC \$7,000)
- Two half day board sessions
- Two half day staff sessions
- Many hours of drafting and rewrites
- Took about 6 months from start to finish



## Process Used





## Goals Identified

1. CRC is widely recognized as the premier provider of timely, relevant, and unbiased research promoting informed public policy decision making.
2. Michigan citizenry is more informed about public policy issues, alternatives, and implications and is more engaged in public policy discussions
3. CRC is a financially sustainable organization
4. CRC has the capacity to advance its mission
- 6 5. CRC ensures constant quality improvement of all facets of operations



## Outcomes

### Plan Focuses on the Following:

- Improving CRC's visibility
- Improving the penetration of research and developing new channels for research delivery
- Improving financial sustainability and overall organizational capacity
- Measuring and evaluating effectiveness

### Plan Did Not Focus on:

- What topics should be researched (although discussed process for putting together research agenda)



## Challenges/Lessons Learned

- Board and staff consist of analysts who have some resistance to “right brained” planning exercises – could have gone poorly with wrong facilitator
- Could have used more time with board, but unrealistic to expect busy board members to devote more time than they did – meant that some board tasks were finished by staff
- Would have been helpful to have a session with both board members and staff present





## Challenges/Lessons Learned

- Initial time line I put together for implementation was wildly optimistic
- Many of the tasks would be far easier to accomplish with expenditures that are difficult to make in a tough financial environment



## Bottom Line

- Strategic plan was definitely worth doing, both the exercises and the actual document produced were helpful
- CRC had been operating with an implicit strategy, making it explicit ensures that everyone is in agreement with what we are trying to do
- Plan helped to engage the board and the process was good for newer board members to better understand the organization and the mission.



CRC Publications are available at:

[www.crcmich.org](http://www.crcmich.org)

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