

500-DAY STRATEGIC PLAN

Kem C. Gardner Policy Institute | September 2019

UNIVERSITY OF UTAH
DAVID ECCLES SCHOOL OF BUSINESS

KEM C. GARDNER POLICY INSTITUTE

We are an honest broker of

INFORMED
RESEARCH

that guides

INFORMED
DISCUSSIONS

and leads to

INFORMED
DECISIONS™

This 500-Day Plan serves as a tool to guide our work in helping people make informed decisions. The plan includes our vision, mission, values, strategic objectives, action steps, and key performance indicators to guide the daily and long-term direction of the Kem C. Gardner Policy Institute. We view this strategic plan as a rolling 500-day plan with a 5,000-day horizon. We present the plan in outline format to make each of the elements readily available.

I Vision

Be Utah's preeminent public policy institute and a vital gathering place for policy leadership and thoughtful discourse that helps our community prosper.

We also support our institutional home, the David Eccles School of Business, achieve its vision of becoming a top 25 business school in the country, and partner with the College of Social and Behavioral Science in inspiring human solutions to life's challenges.

II Mission

Develop and share economic, demographic, and public policy research that sheds light and helps people make INFORMED DECISIONS™.

We also assist the David Eccles School of Business create value for students and the community, offer premier experiences, and provide thought leadership through innovative research and discovery.

*“Not knowing when the dawn
will come I open every door.”*

Emily Dickinson

This quote, by Kem Gardner's favorite poet, inspires the research mission at the Institute. We shed light and open doors for decision-makers.

III Committable Core Values

Our work is guided by five committable core values that define who we are, how we conduct ourselves, and what comprises our work culture.

- A. Responsibility to the community** – The Kem C. Gardner Policy Institute exists to serve Utah and help our state prosper. While we contribute to regional, national, and international public policy issues; we focus on assisting communities within our state make informed decisions.
- B. Research integrity and relevance** – The Kem C. Gardner Policy Institute adheres to ethical principles and professional standards essential for responsible research. We value independent, relevant, meaningful, and understandable work.
- C. Accountability** – The Kem C. Gardner Policy Institute holds employees responsible for being continually productive in the

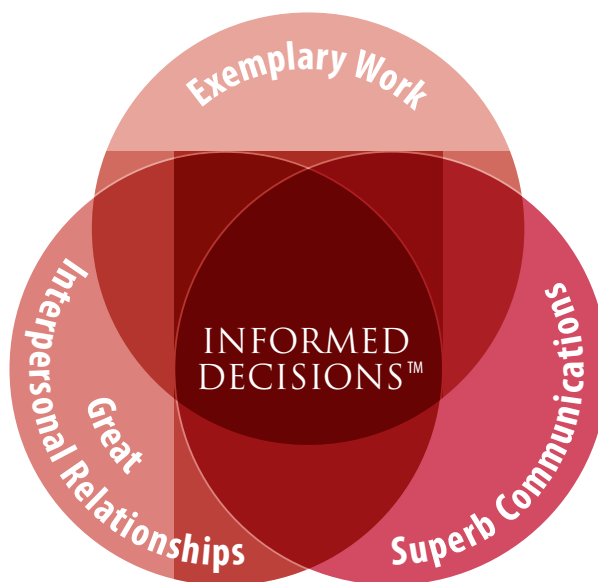
work setting, being fiscally responsible, and delivering high quality products and services to the community, university, Eccles School, donors, and clients.

- D. Collaboration** – The Kem C. Gardner Policy Institute actively partners with people and organizations on campus and in the community to achieve our vision and mission. We believe teamwork among our staff will provide the best research and foster success.
- E. Positive and passionate** – The Kem C. Gardner Policy Institute employs people who are deeply committed to their craft and contribute to a positive and respectful work environment. We seek a congenial workplace where individual differences are both respected and celebrated, and we have fun along the way.

IV Foundational Pillars

In addition to our committable core values, we build from foundational pillars necessary to achieve our vision and mission.

- A. Exemplary work**
- B. Superb communications**
- C. Great interpersonal relationships**



V Strategic Objectives

We build from the foundation of the University of Utah's strategic goals. We then focus on six strategic objectives (two primary and four supporting) that support our mission and vision.



University of Utah Strategic Goals

- 1 Develop and transfer new knowledge
- 2 Promote student success to transform lives
- 3 Engage communities to improve health & quality of life
- 4 Ensure long-term vitality of the University

Source: University of Utah, Office of the President: president.utah.edu/universitystrategy

“The brain is wider than the sky... the brain is deeper than the sea.”

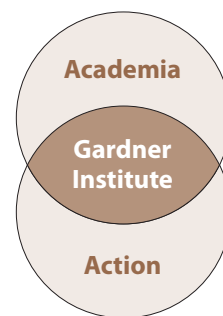
Emily Dickinson

The Gardner Institute promotes data-driven decisions. We conduct independent, credible, and trusted research.

A CONNECT ACADEMIA AND ACTION

1. Intent statement

At the end of 500 days, we will have maximized the intersection of academia and action as our deeply relevant, meaningful, and well-communicated research assists elected officials, business and community leaders, and individuals make informed decisions. In doing so, we will contribute to the University of Utah's strategic goal to "develop and transfer new knowledge."



2. Action steps

a. Conduct independent, relevant, meaningful, and understandable research that adheres to ethical principles and professional standards

- i. This research is prioritized each year in written form
- ii. This research sheds light, not heat
- iii. Seminal research and products over the next 500 days will be the following:
 - 1) Book on Utah's tax system prepared by our scholar in residence
 - 2) Landmark study defining Utah's economic regions. This will support our long-term employment and population projections
 - 3) Programming of a Utah economic base projection model. This will support our long-term population and employment projections
 - 4) Environmental research that will help reduce emissions, improve air quality, and mitigate health impacts in Utah
 - 5) Commercial real estate research that will broaden our reach
 - 6) Research on the impact of affordable high-density housing on surrounding residential values
 - 7) The Utah Coal Country Strike Team's work to diversify the economies in Carbon and Emery counties
 - 8) Visual Guide to Tax Modernization: Part II
 - 9) Opportunity Zones

b. Cultivate outstanding relationships with our campus partners

- i. President's Office
 - 1) Alliance for the American Dream
 - 2) Landmark study on economic impact of University of Utah
- ii. Eccles School
 - 1) Dean's Team
 - 2) Marriner S. Eccles Institute for Economics and Quantitative Analysis
 - 3) QAMO faculty and students
 - 4) Ivory-Boyer Real Estate Center and Utah Real Estate Challenge
 - 5) Sorenson Impact Center
 - 6) Lasonde Entrepreneur Institute
 - 7) Daniel's Fund Ethics Initiative
 - 8) Business Scholar fellowships and Interns
 - 9) Teaching and events
- iii. College of Social and Behavioral Sciences
 - 1) Advancement Board
 - 2) Utah Population Database and Wasatch Front Research Data Center
 1. Serve on RDC Steering Committee
 - 3) Teaching and events
 - 4) Graduate assistants
 - 5) Interns
- iv. Hinckley Institute
 - 1) Hinckley Forum participation
 - 2) Hinckley Report
 - 3) Hinckley Poll
 - 4) Election briefs
 - 5) Teaching and events

v. **Health Sciences**

- 1) Strengthen Partner in the Community relationship
- 2) Collaborative research
- 3) Economic impact of University of Utah Health

vi. **Metropolitan Research Center**

- 1) Collaborative research
- 2) Teaching and events

vii. **Honors College**

- 1) Praxis Lab

viii. **Utah Education Policy Center**

- 1) Collaborative research

ix. **Department of Atmospheric Sciences in the College of Mines and Earth Sciences**

- 1) Collaborative research
- 2) Teaching events

x. **Communicate regularly with faculty advisors and campus advisory team, invite them to premier events, and consult with them on substantive research issues**

B SERVE OUR COMMUNITY

1. Intent statement

At the end of 500 days, the Institute will have fortified the service mission of our flagship public university by sharing fact-based research that enriches our community and positively shapes Utah's future. In doing so, we will contribute to the University of Utah's strategic goal to *"engage communities to improve health and quality of life"* and be the University FOR Utah in action.



2. Action steps

a. Cultivate outstanding relationships and outcomes with our strategic partners

i. Governor's Office

(GOMB, GOED, and OED focus)

- 1) Provide economic intelligence
- 2) Collaborate on demographic and economic research
- 3) Provide economic and demographic training
- 4) Strengthen Partner in the Community relationship

ii. Utah Legislature

- 1) Provide economic intelligence
- 2) Host bi-annual policy summits
- 3) Prepare air quality/changing climate road map for legislative consideration
- 4) Secure support for expanded public finance research
- 5) Support League of Tomorrow for Utah House Speaker Brad Wilson
- 6) Provide economic and demographic training to staff and elected officials

iii. Economic Development

Corporation of Utah

- 1) Serve as economic advisor
- 2) Support senior advisor

iv. Salt Lake Chamber

- 1) Serve as chief economist
- 2) Support CEO Outlook
- 3) Publish Utah Informed
- 4) Support Utah Economic Summit
- 5) Strengthen Partner in the Community relationship

v. Salt Lake County

- 1) Provide economic and demographic intelligence via contract work
- 2) Support climate change work group
- 3) Secure Partner in the Community relationship

vi. Salt Lake City

- 1) Provide economic and demographic intelligence via contract work
- 2) Strengthen Partner in the Community relationship

vii. United Way of Salt Lake

- 1) Support committee and board service

viii. Utah League of Cities and Towns

- 1) Partner to provide training to local government elected officials and staff
- 2) Present at annual meetings

ix. Utah Association of Counties

- 1) Partner on regional development efforts, including the Utah Coal Country Strike Team

x. World Trade Center Utah

- 1) Serve on board
- 2) Host international VIPs

xi. U.S. Census Bureau

- 1) Support 2020 Census
 - a) 2020 Census Advisory Council
 - b) Count Review
 - c) Participant Statistical Areas Program (PSAP)
 - d) Educational outreach
 - e) Community convener
 - f) Provide campus and Eccles School leadership
- 2) Serve as lead entity in Utah for the State Data Center program
 - a) Pursue national leadership opportunities
- 3) Participate and lead in Federal State Cooperative for Population Estimates/Projections
 - a) Pursue national leadership opportunities

b. Take the Institute to Utah's heartland and establish statewide presence

i. Focus on regional centers with institutions of higher learning:

- 1) Logan
- 2) Ogden-Layton
- 3) Provo-Orem

- 4) Price
- 5) Richfield
- 6) Vernal
- 7) Cedar City
- 8) St. George

c. Improve report accessibility and distribution

i. Make continuous improvements to website and social media

ii. Maintain library of printed reports

iii. Distribute printed reports to focused constituencies

iv. Share work product statewide

v. Submit all publications to the Marriott Library's Institutional Research – "Kem C. Gardner Policy Institute Collection"

vi. Implement file naming conventions for publicly distributed documents.

vii. Implement standards for specifying "document properties" (metadata) on all publicly distributed PDF documents.

viii. Create digital object identifiers for major research products

The Gardner Institute embraces an optimistic, can-do spirit. We are positive and passionate about our work and its impact on the community.

"I dwell in possibility."

Emily Dickinson

G INVEST IN TALENT

1. Intent statement

At the end of 500 days, we will have deepened our expertise and created a fantastic learning culture. In doing so, we will contribute to the University of Utah's strategic goal to "develop and transfer new knowledge" and "improve health and quality of life."

2. Action steps

a. Support employee skill development

i. Provide additional writing and other professional training

- 1) Increase knowledge and application of AP Style
 - a) Customize AP Stylebook for Institute
- 2) Refine and standardize "Analysis in Brief"

ii. Support high-value professional development opportunities

iii. Champion involvement with professional associations

iv. Support creative and effective ways to enhance research productivity

- 1) Find proper balance between even greater accountability, empowerment, and flexibility

b. Be actively engaged in Institute culture building

i. Achieve greater collegiality, trust, and empathy among staff

iii. Connect "mini-cultures" within the Institute

ii. Foster professional meaning for each employee

iv. Eliminate gap between Leadership Team and staff

c. Attract promising new senior talent

i. Economics and demographics

- 1) Establish rigorous and service-based public finance practice area
 - a) Secure additional public finance talent and resources
- 2) Enhance environmental expertise to support existing energy and tourism practice areas
- 3) Hire outstanding new talent to support senior analysts

4) Contract with prominent outside experts when needed

5) Provide opportunity for graduate assistant in demography

ii. Survey research

- 1) Develop deliberative practice
- 2) Provide and expand technical support for Hinckley Poll

d. Improve existing and add new advisory councils

i. Feature on website

iii. Form new advisory council on thought leadership

ii. Involve in events

e. Maximize value from senior advisors

f. Continually assess need for additional talent

D CREATE CENTRAL GATHERING PLACE

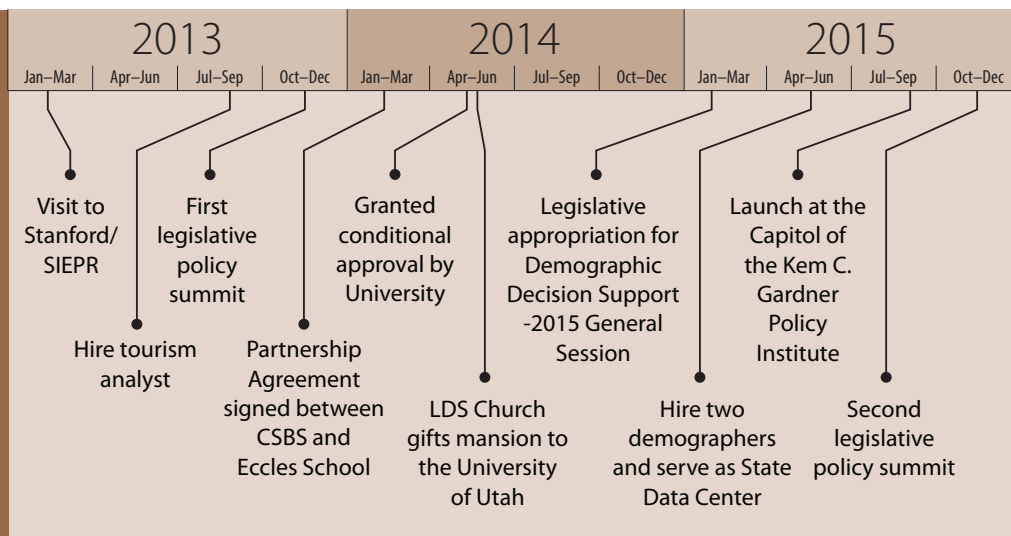
1. Intent statement

At the end of 500 days, the Thomas S. Monson Center will fulfill its potential as an embassy for the University of Utah downtown and be recognized as an acclaimed center for policy leadership in Utah. In doing so, we will contribute to the University of Utah's strategic goal to "engage communities to improve health and quality of life."

2. Action steps

- a. Contribute to improved leadership and management of the Monson Center to fully utilize it as an embassy**
 - i. Strengthen financial standing
 - ii. Optimize public purpose utilization
 - iii. Build out the Hinckley-Gardner-Hatch vision
 - iv. Reduce emphasis on private gatherings that detract from embassy vision and compete with private sector
- b. Finish construction of Garden Level of the West Wing for staff offices and meeting space**
- c. Host nine Newsmaker Breakfasts a year**
- d. Host Utah State Data Center Annual Conference**
- e. Host two Utah Population Committee meetings each year**
- f. Host three Informed Decision Seminars a year**
 - i. Partner with Utah Community Builders
 - ii. Partner with Hatch Center
 - iii. Partner with Urban Institute
- g. Convene Annual Leavitt-Romney Symposium**
- h. Host events with the Sutherland Institute, the United Way, and others**
- i. Co-host the Utah Legislature's policy summit every other year**
- j. Host bi-monthly Utah Economic Council meetings and quarterly Economic Club of Utah meetings**
- k. Host the annual Informed Decision Maker of the Year luncheon**
- l. Host two deliberative engagement events annually**
- m. Present Economic Lifetime Achievement Award as appropriate**

Kem C. Gardner Policy Institute Timeline



E CULTIVATE NATIONAL PROFILE

1. Intent statement

At the end of 500 days, the Institute will be affiliated with prominent national organizations and successfully showcase Utah public policy success stories with national audiences. In doing so, we will contribute to the University of Utah's strategic goal to "develop and transfer new knowledge."

2. Action steps

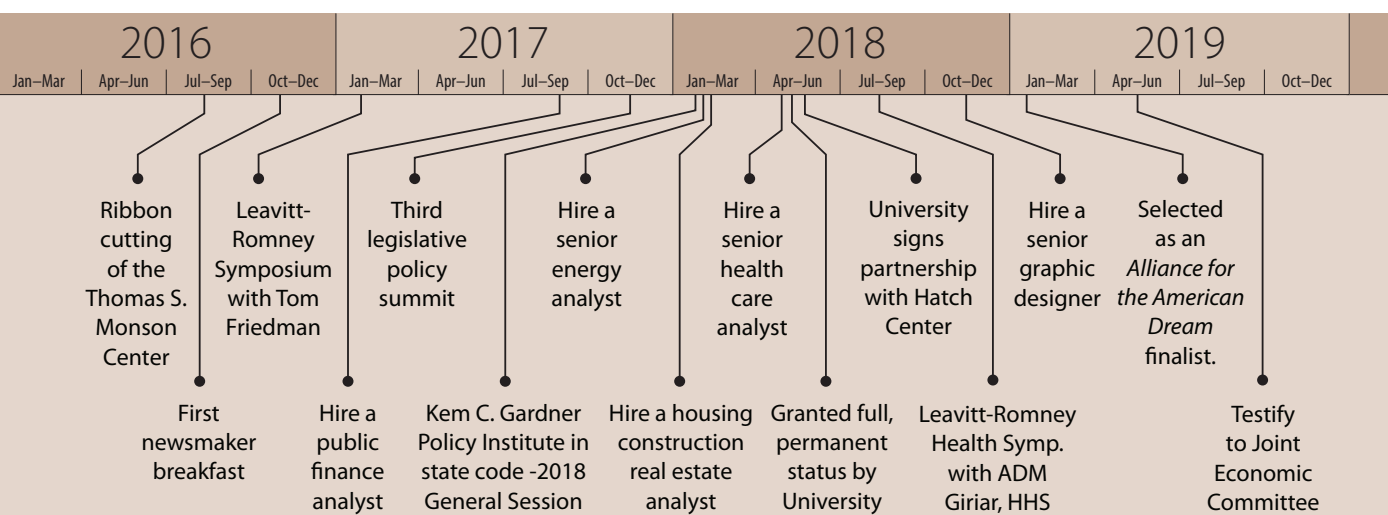
a. Capitalize on national opportunities to showcase the institute

- | | |
|---|---|
| i. Marriner S. Eccles Institute for Economics and Quantitative Analysis | xiv. National Association of State Budget Officers |
| ii. Center for Value Based Health Care
1) Establish Utah as a recognized global center for value-based health care | xv. National Conference of State Legislatures |
| iii. Hatch Center | xvi. National Association of Counties |
| iv. Sutherland Institute | xvii. Association for University Business and Economic Research |
| v. 2020 Decennial Census | xviii. Consortium of University Public Service Organizations |
| vi. American Enterprise Institute | xix. Stanford Institute for Economic Policy Research
1) Attend 2020 Economic Summit |
| vii. Brookings Institution | xx. Media
1) Deseret News National Edition
2) Paper of record - Salt Lake Tribune |
| viii. Pew | xxi. Other business, non-profit, or academic groups |
| ix. Volcker Alliance | |
| x. Western Political Science Association | |
| xi. National Governors Association | |
| xii. National League of Cities | |
| xiii. Conference for State Governments | |

b. Double the number of articles published by an out-of-state entity

c. Host a western states economic symposium in Salt Lake City

d. Host or participate in five events a year in Washington, DC.



The Gardner Institute works at the intersection of academia and action. We value relevant, meaningful, and understandable work that aids today's decision-makers.

“Forever is composed of nows.”

Emily Dickinson

F CREATE LONG-TERM STABILITY

1. Intent statement

At the end of 500 days, the Institute will be recognized as an essential community asset worthy of ongoing investment from our named donor, the university, state and local governments, and business and community leaders. In doing so, we will contribute to the University of Utah's strategic goal to *“ensure long-term vitality of the University.”*

2. Action steps

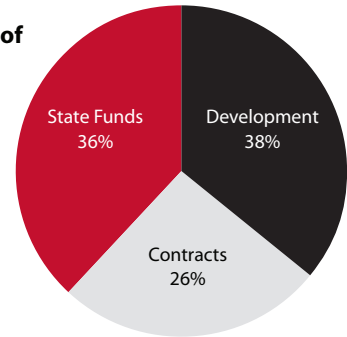
- a. Form and convene an Executive Committee of the Advisory Board to recommend succession planning, a long-term budget plan, and Institute priorities.**
 - i. Co-chaired by Dean Taylor Randall and Clark Ivory
- b. Adopt a written succession plan for senior leadership**
- c. Adopt ten-year budget plan**
- d. Foster continued development of Partners in the Community Program**
 - i. Maintain existing partners
 - ii. Secure additional partners
- e. Add another representative of Utah's tech industry to advisory board**
- f. Participate actively in Hatch Center discussions to secure a financial relationship/partnership**
- g. Achieve short-term budget objectives that support long-term success.**
 - i. Annual contract growth of 3 percent
 - ii. Limit steady-state expenditures to 2.5 percent
- h. Regularly monitor the one-third budget strategy, endowment, and long-term conceptual budget scenarios.**

VI Budget

Sources of Funds, FY19

State Funds	1,262,980
Contracts	902,717
Development	1,349,992
Total	3,515,689

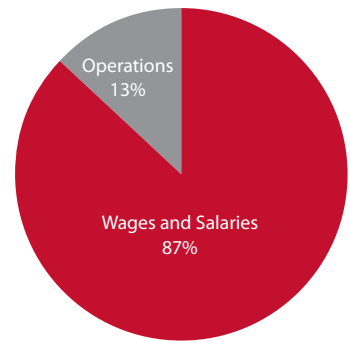
Sources of Funds



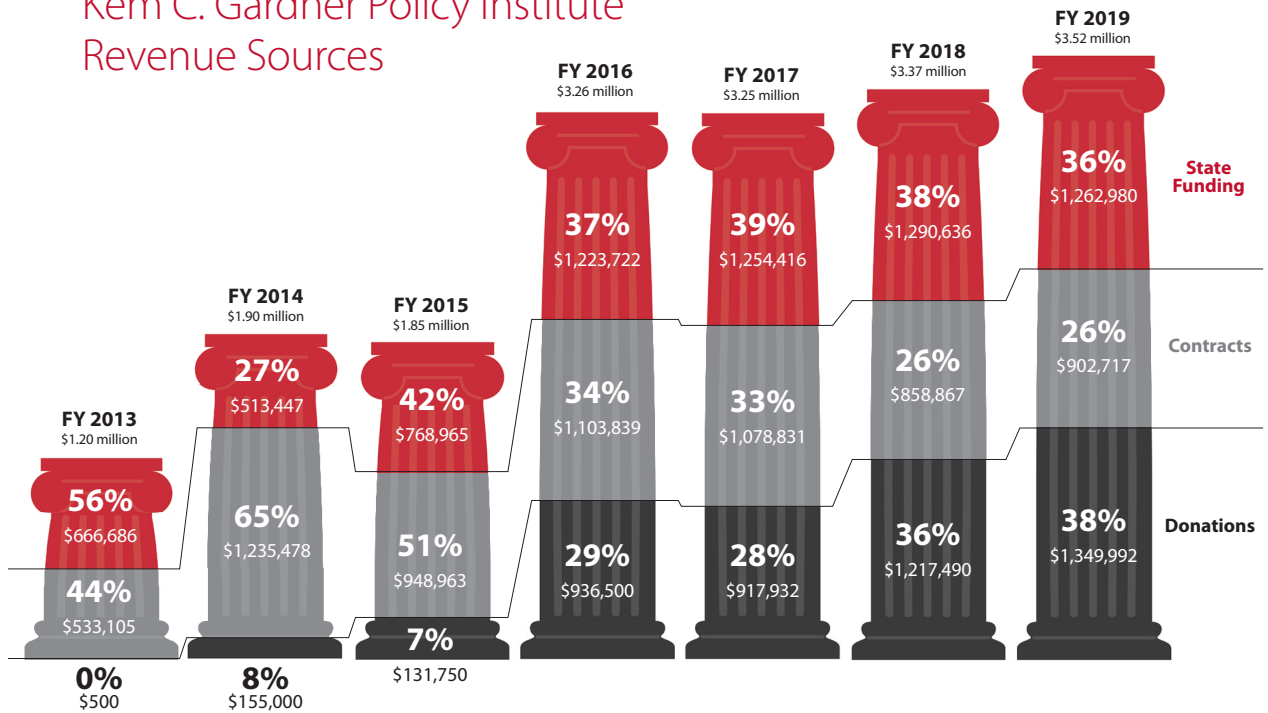
Uses of Funds, FY19

Salaries	2,104,033
Benefits	749,066
Building O & M	67,488
Consultants/Participant Support	23,824
Travel/Business Meals	116,168
Software & Licensing Fees	50,098
Office Supplies	25,242
Equipment & Telephone Exp	29,063
Printing/Copying-Design	32,728
Employee Support	20,597
Other Expenses	51,214
Total	\$3,269,519

Uses of Funds



Kem C. Gardner Policy Institute Revenue Sources



Source: Kem C. Gardner Policy Institute

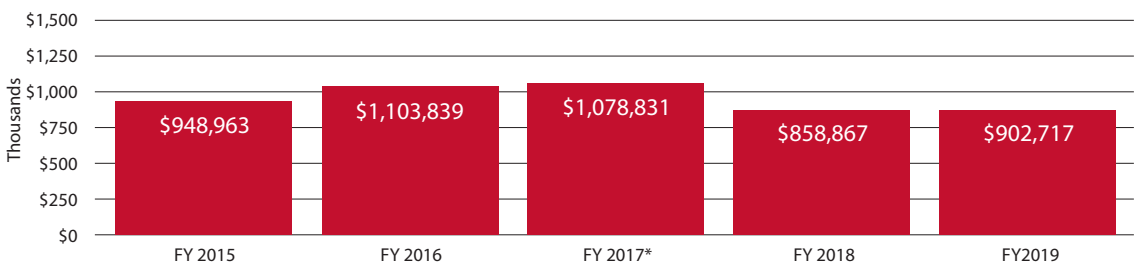
VI Key Performance Indicators FY 2019

Influence Pathway



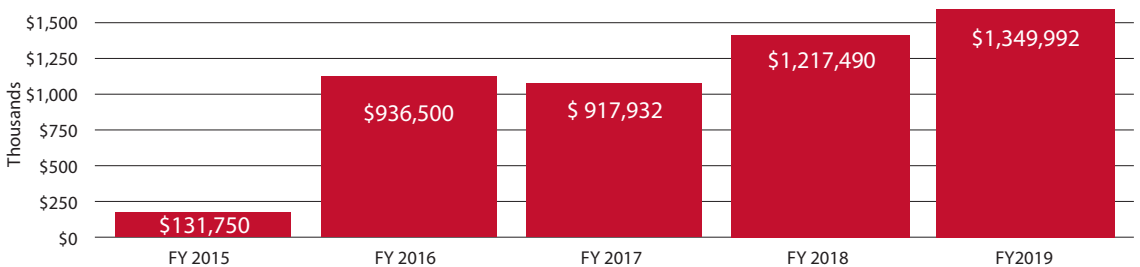
The Key Performance Indicators measure how effective we are at meeting the six strategic objectives. We monitor these indicators over time and adjust plans as needed to ensure that our work leads to a more prosperous community.

Contract Value



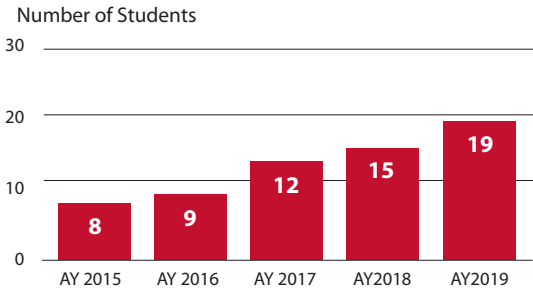
* In spring, 2018, the Gardner Institute transferred a large, multi-year contract to the College of Social and Behavioral Science.
Source: Gardner Institute

Partners in the Community and other donations



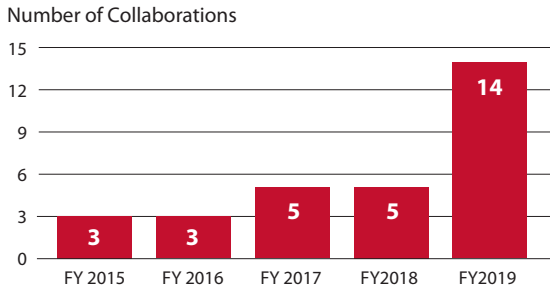
Source: Gardner Institute

Interns, Fellows, and Graduate Assistants



Source: Gardner Institute

Faculty and Center Collaborations



Source: Gardner Institute

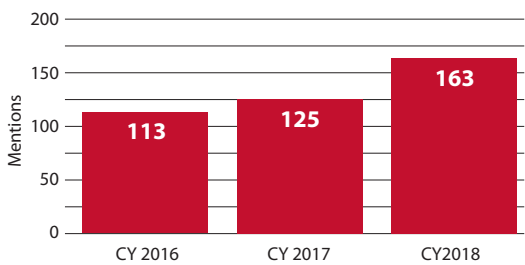
Storybook: Year in Review

August 2018	GOMB and Legislative Staff Training
January 2019	American Dream Ideas Challenge, pitch in Phoenix, AZ
December 2018	Mrs. Claus visits for the Holidays
June 2019	Testimony to the Joint Economic Committee, US Congress
June 2019	Salt Lake Catholic Diocese request for Pope Francis
June 2019	American Dreams Ideas Challenge, final pitch in NYC

Research Highlights

- Utah's Coal Country Strike Team
- Salt Lake City's Current Apartment Boom
- Economic Impact of Utah's Life Sciences Industries
- Economic Report to the Governor
- Informed Decisions 2018 Election Brief
- A Visual Guide to Tax Modernization
- Staying Ahead of the Curve: Utah's Health Care Needs
- Measuring Economic Diversity: The Hachman Index
- The Year in Charts: Utah's Housing Market

Media Mentions



Source: Google News

Major Convenings

- Gardner Institute Symposium: Social Determinants of Health
- National host of Association for University Business and Economic Research (AUBER) conference
- Utah Economic Outlook, in partnership with the Salt Lake Chamber
- Economic Club of Utah Semi-Annual Outlook
- Informed Decision Maker Annual Luncheon
- Monthly Newsmaker Breakfasts

The Gardner Institute values our partners in the community who fund our public purpose research mission.

“My friends are my estate.”

Emily Dickinson

Partners in the Community

The following individuals and entities help support the research mission of the Kem C. Gardner Policy Institute.

Legacy Partners

The Gardner Company
Intermountain Healthcare
Clark and Christine Ivory Foundation
KSL and Deseret News
Larry H. & Gail Miller Family Foundation
Mountain America Credit Union
Mitt and Ann Romney Salt Lake City Corporation
Salt Lake County
University of Utah Health
Utah Governor's Office of Economic Development
WCF Insurance
Zions Bank

Executive Partners

Mark and Karen Bouchard
The Boyer Company
Salt Lake Chamber
Sorenson Impact Center

Sustaining Partners

Clyde Companies
Dominion Energy
Staker Parson Companies

Kem C. Gardner Policy Institute Advisory Board

Conveners

Michael O. Leavitt
Mitt Romney

Board

Scott Anderson, Co-Chair
Gail Miller, Co-Chair
Doug Anderson
Deborah Bayle
Cynthia A. Berg
Roger Boyer
Wilford Clyde
Sophia M. DiCaro
Cameron Diehl
Lisa Eccles
Spencer P. Eccles
Matt Eyring

Kem C. Gardner
Christian Gardner
Brandy Grace
Clark Ivory
Mike S. Leavitt
Kimberly Gardner Martin
Derek Miller
Ann Millner
Sterling Nielsen
Cristina Ortega
Jason Perry
Ray Pickup
Gary B. Porter
Taylor Randall
Jill Remington Love
Brad Rencher
Josh Romney

Charles W. Sorenson
James Lee Sorenson
Vicki Varela
Ruth V. Watkins
Ted Wilson
Natalie Gochnour, Director

Ex Officio (invited)

Governor Gary Herbert
Speaker Brad Wilson
Senate President
Stuart Adams
Representative Brian King
Senator Karen Mayne
Mayor Jenny Wilson
Mayor Jackie Biskupski

Kem C. Gardner Policy Institute Staff and Advisors

Leadership Team

Natalie Gochnour, Associate Dean and Director
Jennifer Robinson, Associate Director
Shelley Kruger, Accounting and Finance Manager
Colleen Larson, Administrative Manager
Dianne Meppen, Director of Survey Research
Pamela S. Perlich, Director of Demographic Research
Juliette Tennert, Director of Economic and Public Policy Research
Nicholas Thiriot, Communications Director
James A. Wood, Ivory-Boyer Senior Fellow

Faculty Advisors

Matt Burbank, Faculty Advisor
Adam Meierowitz, Faculty Advisor

Senior Advisors

Jonathan Ball, Office of the Legislative Fiscal Analyst
Gary Cornia, Marriott School of Business
Theresa Foxley, EDCUtah
Dan Griffiths, Tanner LLC
Roger Hendrix, Hendrix Consulting
Joel Kotkin, Chapman University

Darin Mellott, CBRE
Chris Redgrave, Zions Bank
Bud Scruggs, Cynosure Group
Wesley Smith, Western Governors University

Staff

Samantha Ball, Research Associate
Mallory Bateman, Research Analyst
DJ Benway, Research Analyst
Marin Christensen, Research Associate
Mike Christensen, Scholar-in-Residence
John C. Downen, Senior Managing Economist
Dejan Eskic, Senior Research Analyst
Emily Harris, Demographer
Michael T. Hogue, Senior Research Statistician
Mike Hollingshaus, Demographer
Thomas Holst, Senior Energy Analyst
Meredith King, Research Coordinator
Jennifer Leaver, Research Analyst
Angela J. Oh, Senior Managing Economist
Levi Pace, Senior Research Economist
Joshua Spolsdoff, Research Economist
Paul Springer, Senior Graphic Designer
Laura Summers, Senior Health Care Analyst
Natalie Young, Research Analyst