

Kem C. Gardner Policy Institute | July 2017

500-Day Strategic Plan



AN INITIATIVE OF THE DAVID ECCLES SCHOOL OF BUSINESS



Kem C. Gardner
POLICY INSTITUTE
THE UNIVERSITY OF UTAH

500-Day Strategic Plan

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 metrics 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 that will be updated every 250 days.

I. Vision

To be a vital gathering place and center for independent economic, demographic, and public policy thought leadership.

In applied terminology, we want to be the “Brookings/AEI of Utah” so we can help our community prosper.

We also seek to help our home college, the David Eccles School of Business, achieve its vision of becoming a top 25 business school in the country.

II. Mission

To develop and share economic, demographic, and public policy data and research that help people in the community make INFORMED DECISIONS™.

III. Committable Core Values

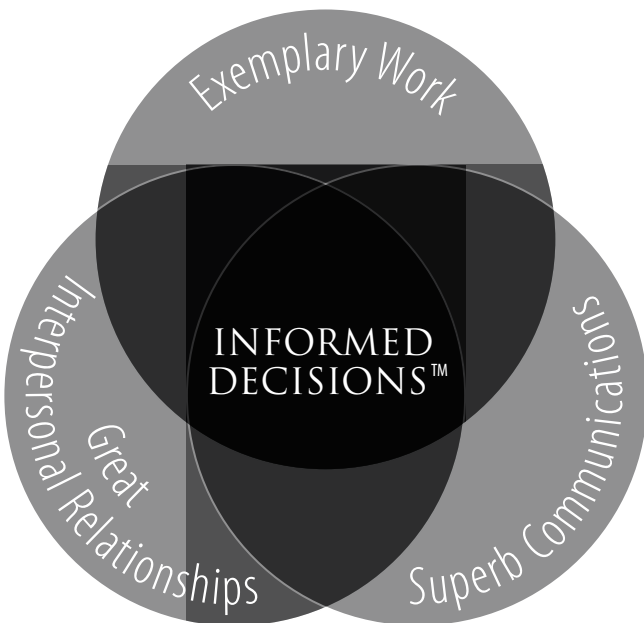
Our work is guided by five committable core values that define who we are, how we conduct ourselves, and what comprises our work culture.

- 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 of interest 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 have identified foundational pillars necessary to achieve our vision and mission.

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



V. Strategic Objectives

The Leadership Team has identified six strategic objectives for the next 500 days. These objectives include an intent statement, action steps, and metrics to measure progress.

A. Build talent base

i. Intent statement

1. At the end of 500 days, the Institute will have enhanced the skills of existing employees, trained and mentored deputies for each team, broadened the involvement and contribution of interns, recruited and operationalized a group of senior advisors and fellows, and attracted promising new talent to the Institute.

ii. Action steps

1. **Employee development** – Support internal and external employee development. Priority areas include:
 - a. Bureau of the Census products and programs
 - b. Professional association opportunities
 - c. Professional development
 - d. Lunch and Learn trainings
2. **Deputies and succession planning** – Identify, train, and mentor deputies within each team and institute-wide, who can serve as the “second in command” and sustain the development of the Institute

“The Kem C. Gardner Policy Institute sheds light on the complex and challenging public policy issues impacting Utah.”

- Scott Anderson, President and CEO, Zions Bank, and Co-Chair of the
 Kem C. Gardner Policy Institute Advisory Board

*“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.
Research sheds light and opens doors for informed decisions and a more prosperous community.*

3. **Interns and fellows** – Provide opportunities for interns and fellows to make a meaningful contribution to the Institute
 4. **Senior advisors and fellows** – Recruit and operationalize senior advisors and fellows in the following areas:
 - a. Demographics
 - b. Public finance
 - c. Economics and commercial real estate
 - d. International trade
 - e. National outreach
 - f. Media and society
 - g. Leadership and training
 - h. Others as identified
 5. **New hires** – Secure the funding to make the following strategic hires:
 - a. Survey research analyst/deputy
 - b. Economic and public policy analyst/deputy
 - c. Health care analyst
 - d. Public finance analyst
 - e. Events coordinator
 - f. Professional writer/copy editor
 - g. Others as funded
- iii. **Metrics** – The Leadership Team will assess improvement in the talent base via several metrics:
 1. Results of quarterly employee performance cards
 2. Results of annual staff survey
 3. Inventory of Institute staff and credentials
 4. Input from exit surveys of departing employees, graduate assistants, Business Scholar interns, and Hinckley interns
 5. Tabulation of the number of days of employee training each quarter
 6. Regular discussions at Leadership Team meetings about Institute outcomes

Gardner Policy Institute Strategic Objectives

- Build talent base
- Enhance existing and develop new areas of excellence
- Magnify relationships with the community
- Create a central gathering place
- Strengthen student and faculty connection
- Create long-term sustainability

B. Enhance existing and develop new areas of excellence

i. Intent statement

1. At the end of 500 days, the Institute will have enhanced existing and developed new areas of excellence that broaden and deepen our understanding of the Utah economy, Utah demographics, and public policy. We will contribute to the University of Utah’s strategic goal to “develop & transfer new knowledge.”

ii. Action steps

1. **Existing areas of expertise** – Produce research briefs, reports, and studies to brand, market, and deepen the work of these existing areas of excellence
 - a. Demographics
 - i. Population estimates
 - ii. Population projections
 - iii. Community indicators
 - iv. Census and demographic subject area expertise
 - b. Economics
 - i. Policy areas
 1. Utah economy
 2. Economic and fiscal impact analyses
 3. Short-run economic forecasts
 4. Revenue forecasts
 5. Industry trends and employment projections

ii. Industry expertise

1. Travel and tourism
2. Construction, housing, and real estate
3. Defense
4. Natural resources (energy, water, public lands, and others)

2. New areas of expertise – Develop and market new areas of expertise

- a. Public finance
- b. Health care
- c. High tech and life sciences
- d. Civic leadership
 - i. Deliberative public engagement
- e. Training
 - i. Applied economic, demographic, and survey research training for elected officials and working professionals

iii. Metrics

1. Develop a client feedback survey
2. The Institute meets fundraising goals
3. The Institute has published materials describing areas of excellence
4. Public recognition of the areas of excellence or the research via media mentions, awards, and other means



C. Magnify relationships with the community

i. Intent statement

1. At the end of 500 days, the Institute will have established and enhanced productive and meaningful relationships with our strategic partners and other entities in the community.

ii. Action steps

1. Cultivate outstanding relationships with our strategic partners
 - a. Economic Development Corporation of Utah
 - i. Serve as economic advisor
 - ii. Partner in the Community
 - b. Governor’s Office (GOED and GOMB focus)
 - i. Provide economic intelligence
 - ii. Collaborate on demographic research
 - iii. Partner in the Community
 - c. Salt Lake Chamber
 - i. Serve as chief economist
 - ii. Partner in the Community
 - d. Salt Lake City
 - i. Ongoing research contract
 - ii. Partner in the Community
 - e. Salt Lake County
 - i. Ongoing research contract
 - ii. Partner in the Community

- f. United Way of Salt Lake
 - i. Proposed board service
- g. Utah League of Cities and Towns
- h. Utah Legislature (LFA and OLRGC)
 - i. Host policy retreats
 - ii. Provide services and advice
- i. World Trade Center Utah
 - i. Ongoing research contract
 - ii. Partner in the Community
2. Develop meaningful relationships with entities in our community that will benefit from our research and help us achieve our vision
 - a. Partners in the Community
3. Support the service of Institute employees on community boards

iii. Metrics

1. Dollar value of contract work completed for our strategic partners
2. Dollar success of Partners in the Community program
3. Number and audience reach of speaking engagements
4. Number of community boards with representation from Institute employees

D. Strengthen student and faculty connection

i. Intent statement

1. At the end of 500 days, the Institute will be a sought after place for experiential learning and will have established strong and mutually beneficial relationships with our campus partners, faculty advisors, and assist with data and research that helps the U’s research faculty develop and transfer new knowledge.

ii. Action steps

1. Provide opportunities for undergraduate and graduate students to work at the institute as hourly employees, interns, fellows, and graduate assistants
2. Communicate regularly with faculty advisors, invite them to premier Institute events, and consult with them on substantive research issues
3. Consult with members of the Campus Advisory Team to discover ways our data and research can assist faculty in their research
4. Teach classes on campus as guest lecturers and adjuncts

University of Utah’s 4 Big Strategic Goals

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

Source: University of Utah, Office of the President

5. Advise graduate program research efforts
6. Participate on campus leadership teams and committees
 - a. Eccles Dean's Team
 - b. Others

7. Cultivate outstanding relationships with our campus partners
 - a. Eccles School
 - i. Business Scholar Fellowships and Interns
 - ii. Sorenson Impact Center
 - iii. MSIS
 - b. Campus Advisory Team
 - c. College of Social and Behavioral Science
 - i. Graduate Assistants
 - d. Hinckley Institute
 - i. Hinckley Interns
 - e. Health Sciences
 - i. Health care analyst
 - ii. Economic impact analyses
 - f. Honors College
 - i. Praxis Lab
 - g. Metropolitan Research Center
 - h. Utah Education Policy Center

- i. Utah Population Database team
 - i. Census Research Data Center

iii. Metrics

1. Number of graduate assistants, Business Scholar interns and fellows, Hinckley interns, and other interns
2. Results of exit surveys with graduate assistants, Business Scholar interns and fellows, Hinckley interns, and other interns
3. Representation from a variety of colleges and schools on the campus advisory team
4. Number of research projects where faculty advisors provided assistance
5. Number of examples where Institute data or research served a faculty research need
6. Number of staff involved in an adjunct role
7. Number of guest lectures
8. Number of teams/committees staffed by Institute employees

E. Create a central gathering place

i. Intent statement

1. At the end of 500 days, the Institute will have developed a highly-regarded reputation as a marketplace of ideas and center for thought leadership where people gather to discuss, learn about, share, and understand important data and ideas about Utah.

ii. Action steps

1. Host nine Newsmaker Breakfasts a year
2. Convene annual Leavitt-Romney Symposium
3. Host the Utah Legislature’s policy summit every other year

4. Host quarterly premier economic briefings

5. Look for opportunities to host, co-host, or facilitate other public policy convenings at the institute

iii. Metrics

1. Number of events and attendees at events hosted by the Institute
2. Number of media mentions from convenings hosted by the Institute
3. Number of elected officials who attend events at the Institute

F. Create long-term sustainability

i. Intent statement

1. At the end of 500 days, the Institute will have made significant progress on its long-term budget goals to achieve a balanced revenue base (one-third each from state funds, contract funds, and donor funds) and secure a \$20 million endowment over the next ten years. We will contribute to the University of Utah’s strategic goal to “ensure the long-term viability of the University.”

ii. Action steps

1. Secure Partners in the Community that make five-year pledges to support the Institute
2. Participate actively in the Hatch Institute discussions led by Scott Anderson and Kem Gardner and seek

to achieve a substantial donation to the Institute’s endowment and the ongoing O&M expenses at the mansion

3. Achieve short-term budget objectives that support long-term success. These include annual contract growth of 5% through FY18 and 3% thereafter, and limit annual steady-state expenditure growth to 2.5%

iii. Metrics

1. Regular monitoring of the one-third strategy
2. Regular monitoring of the Institute endowment
3. Regular monitoring of long-term conceptual budget scenarios

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INFORMED DECISIONS™