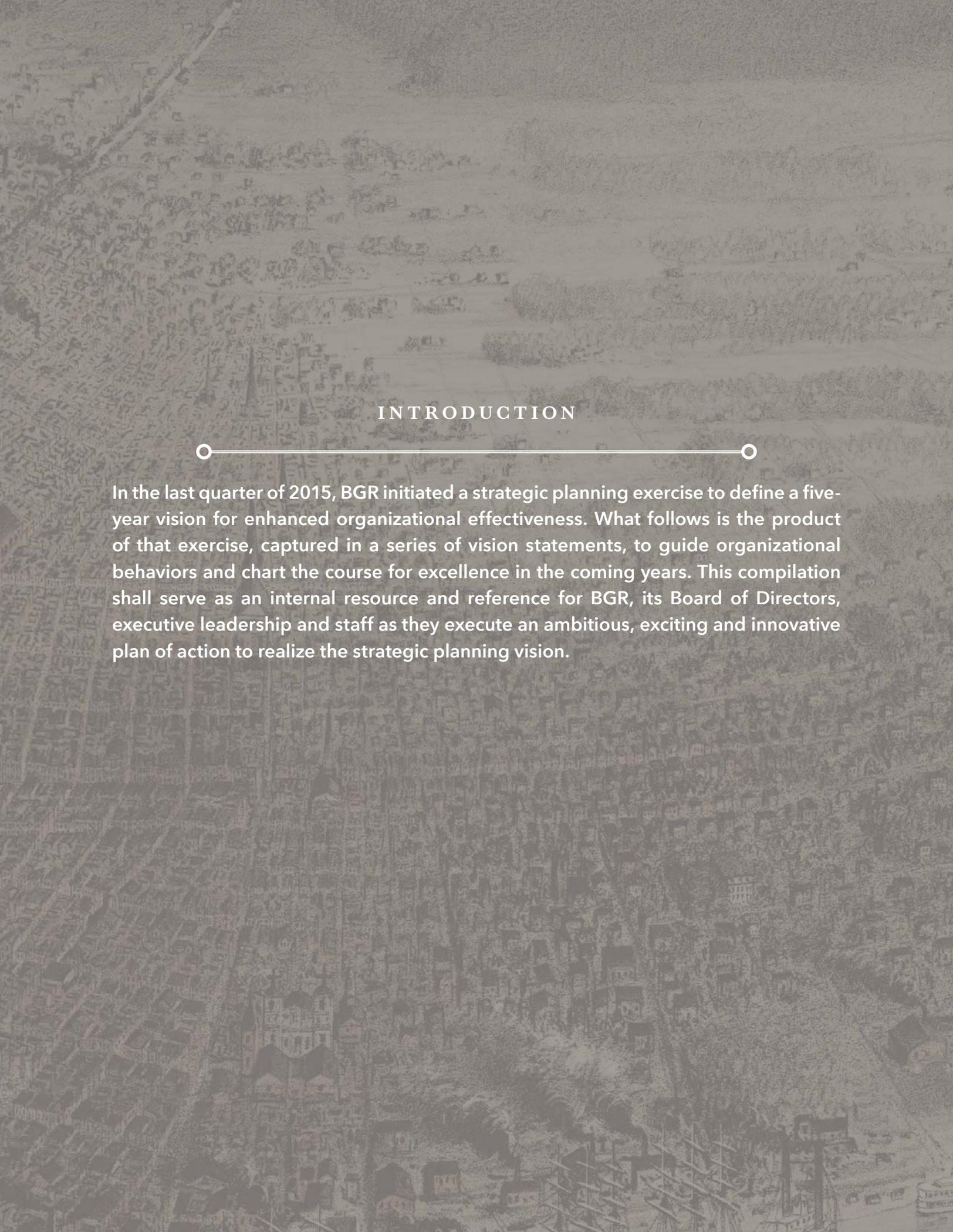


A STRATEGIC VISION

FOR ORGANIZATIONAL EXCELLENCE

JANUARY 23, 2018



An aerial, sepia-toned photograph of a city, likely New Orleans, showing a dense urban grid, a prominent church spire, and construction cranes in the foreground. The image is used as a background for the document.

INTRODUCTION

In the last quarter of 2015, BGR initiated a strategic planning exercise to define a five-year vision for enhanced organizational effectiveness. What follows is the product of that exercise, captured in a series of vision statements, to guide organizational behaviors and chart the course for excellence in the coming years. This compilation shall serve as an internal resource and reference for BGR, its Board of Directors, executive leadership and staff as they execute an ambitious, exciting and innovative plan of action to realize the strategic planning vision.

OUR MISSION

The Bureau of Governmental Research is a private, nonprofit, independent research organization dedicated to informed public policy making and the effective use of public resources for the improvement of government in the New Orleans metropolitan area.

THE STRATEGIC PLANNING PROCESS

BGR identified self-awareness as a fundamental starting point for its planning process. Throughout 2016, BGR obtained opinions and facts that facilitated a better understanding of the organization's position in the public policy landscape. BGR solicited Board and stakeholder perspectives, surveyed decades of results of its past public policy recommendations, and considered and compared key features of comparable governmental research organizations throughout the country.

In September 2016, the BGR Board and executive leadership gathered for a planning retreat to receive and build on this enhanced understanding. The BGR team emerged with an updated, shared understanding of the organization; its primary purpose of furnishing objective, thorough research; and its attendant purpose of causing outcomes and impacts consistent with BGR recommendations. BGR also recognized that informing the citizenry and policymakers of BGR recommendations is an action that falls within its primary purpose. In addition, BGR affirmed its current mission statement and brainstormed words to explain BGR's core values.¹

Importantly, BGR identified five key issues for which it would develop vision statements to frame organizational success. Those key issues are: (1) Membership, (2) Communication, (3) Implementation and Measurement, (4) Coordination and Convening and (5) Diversity. Over the next year, the BGR Strategic Planning Committee met regularly and discussed each key issue in the context of a five-year plan of action. The committee worked to determine a precise vision statement for each issue. The committee's work concluded in December 2017.

We are pleased to launch 2018 with the clarity of the vision statements that follow. We will honor the work required to formulate them with a plan to realize each in the near term.

¹ Suggestions included: fair, thorough, accurate, relevant, influential, objective, independent, data-driven, evidence-based, informed, credible, nonpartisan, inclusive, transparent, evolving, current, high-quality, historic, accountable, transformational, proactive, results-oriented, tenacious, collaborative, accessible, professional, diverse, effective, continuous improvement, integrity and best practices.

KEY ISSUE #1 MEMBERSHIP



BGR should maintain and grow its membership base to increase engagement, advocacy, outreach, effectiveness and visibility:

- Implement a membership structure that embeds member value and BGR's reputation for excellence;
- Deploy the structure toward community-wide outreach by identifying community and nonprofit leaders to participate in a biannual President's Gathering of Community Leaders, which will serve as a channel for the President to inform community leaders about BGR initiatives and priorities and to obtain their feedback and perspective;
- Set annual goals for membership growth; and
- Achieve the dual purpose of supporting and systematizing fundraising.

KEY ISSUE #2 COMMUNICATION



BGR will update its external communication strategies and protocols to actively engage Board members as ambassadors for the organization and to achieve community-wide visibility and understanding of BGR's mission and work. Through this strategy BGR will:

- Strengthen its media presence and coverage through:
 - » The development and institutionalization of an *in globo* media strategy for all releases, including written procedures, identity of media outlets and reporter relationships, and checklist requirements for public release of work product; and
 - » The proactive use of this media strategy to creatively tailor each release plan toward maximal media coverage.

- Increase its social media presence and followers through:
 - » The development of a social media plan, including benchmarks and goals for each social media outlet and a time period for achieving them.

- Broaden the audience for its work products by capturing and retaining attention through:
 - » The use of audio and video, other visuals, graphics, infographics and summary presentations that can convey report analyses and recommendations more succinctly and effectively; and
 - » The redesign of its website to more effectively deliver organizational information and BGR's substantive work product.

- Engage its membership more actively and frequently, reinforcing BGR's qualities as a member-based organization by:
 - » Stressing the concepts of membership, member participation, and member advocacy; and
 - » Developing and adopting a member communications protocol that incorporates these concepts.

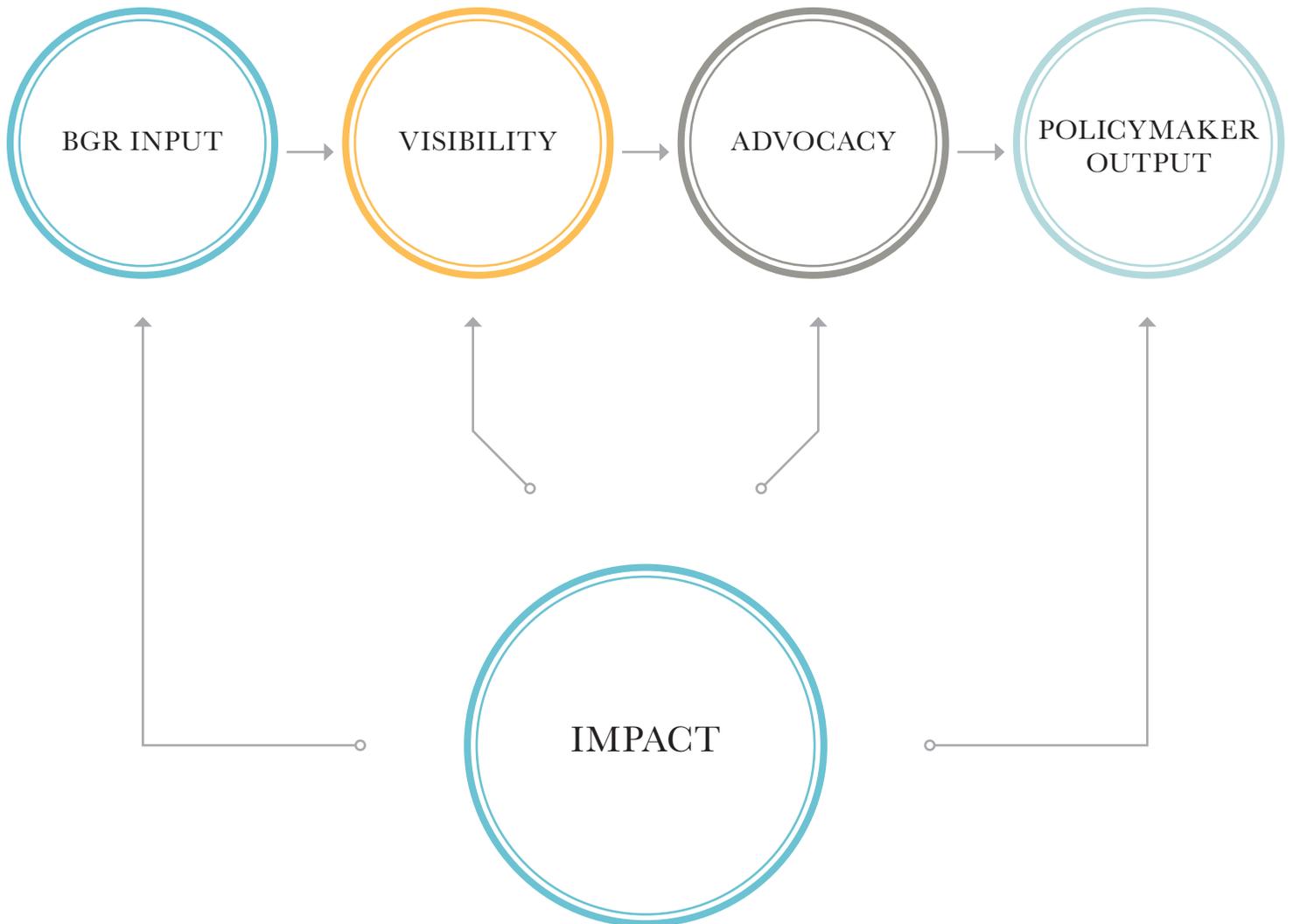
- Using these communication strategies to promote informed public participation and the implementation of BGR recommendations for the improvement of government.

KEY ISSUE #3 IMPLEMENTATION & MEASUREMENT

BGR recognizes that its report recommendations achieve their highest potential when policymakers implement them to improve government effectiveness and create positive impacts for the benefit of citizens. Toward implementation and measurement of its work, BGR will:

- Define the term “implementation” to mean obtaining a policy result in furtherance of BGR recommendations.
- Require an implementation strategy to follow the release of each major research report, including:
 - » Identification of key advocacy groups positioned to carry and support BGR recommendations toward implementation;
 - » Identification of policymakers who are vested with authority to cause implementation;
 - » A plan for educating key advocacy groups and policymakers about BGR’s work; and
 - » A communication plan that embeds the implementation strategy to achieve outreach, education and visibility of BGR’s recommendations.
- Measure and define success through the use of uniform metrics and goals for each of the following:
 - » BGR Input - BGR’s execution of its implementation strategy
 - » Visibility - traditional media coverage, social media reach and distribution
 - » Advocacy - citizens, organizations and policymakers carrying BGR recommendations toward implementation
 - » Policymaker Output - actual implementation of public policy consistent with BGR recommendations, whether in whole or in part
 - » Impact - qualitative or quantitative effects for the benefit of citizens
- Create and maintain internally a project-based implementation dashboard to track input, visibility, output and impact.
- Biannually, or more frequently if requested, present the BGR Board a measurement dashboard aligning with the uniform metrics and goals identified above.
- Annually present the measurement dashboard to members and foundations that support BGR’s work, and make it publicly available to encourage awareness and support.

BGR MEASUREMENT MODEL



BGR INPUT: BGR's execution of its implementation strategy.

VISIBILITY: Traditional media coverage, social media reach and distribution.

ADVOCACY: Citizens, organizations, and policymakers carrying BGR recommendations toward implementation.

POLICYMAKER OUTPUT: Actual implementation of public policy consistent with BGR recommendations, in whole or in part.

IMPACT: Qualitative or quantitative effects for the benefit of citizens.

KEY ISSUE #4 COORDINATION & CONVENING TOWARD IMPLEMENTATION



BGR recognizes that policymakers are more likely to implement BGR recommendations when a broad base of support advocates for them. BGR should identify and work with others who can carry and amplify BGR's message. Toward this end, BGR will work to engage community groups to align in support of BGR recommendations and advocate for them toward implementation. Accordingly, BGR will:

- Protect BGR's independence through: (1) disassociation, when necessary, from any coordinated effort that departs from BGR recommendations and risks different or diminished policy outcomes and (2) preservation of BGR's longstanding approach to research, analysis and the formulation of recommendations, where it strictly guards its autonomy and ensures freedom from control or bias.
- Following the public release of BGR recommendations prioritized for immediate advocacy, plan a coordinated effort to engage and leverage collective support of implementation of BGR recommendations, through:
 - » Identification of community groups likely to advocate for implementation of BGR recommendations;
 - » Conversations with community group leaders to introduce them to BGR recommendations, engage them in the policy conversation about the recommendations and assess their interest in advocacy; and
 - » Development of a Coordinated Advocacy Plan, when appropriate, to share among community groups, including: (1) a clear statement of shared goals and targeted outcomes that incorporates BGR recommendations, (2) a timeline for execution and (3) consistent and clear opportunities for discussion and information exchange among participants.
- Serve as the convener of the community groups as they execute the Coordinated Advocacy Plan. In its role of convener, BGR will:
 - » Initiate and sustain execution of the Coordinated Advocacy Plan; and
 - » Issue periodic updates and summaries to keep participants informed and engaged.
- Provide technical advice and resources to community groups to maintain a message consistent with BGR recommendations.

KEY ISSUE #5
DIVERSITY TO ENRICH BGR'S WORK

BGR recognizes that input from a broad range of perspectives will enrich the substance of its research, analyses, reports and recommendations, and increase the potential for citizen advocacy and policymaker implementation. BGR seeks to embody diverse perspectives. Accordingly, BGR will:

- During the formulation of its work product, where relevant and reasonably ascertainable, include among its inputs:
 - » Informed perspectives that reflect the diversity of the geographic area impacted by the policy issue under consideration; and
 - » Any objective, data-driven analysis completed for the purpose of understanding whether a policy will result in different outcomes or impacts among citizen groups.
- Seek diversity among Board and staff members in areas that are most relevant to BGR's policy conversations, including, without limitation, age, race, gender, geographic location and professional experience.
- Foster a culture of genuine inclusion through openness to different opinions and perspectives at all levels of the organization.
- Call upon Board member diversity to:
 - » Incorporate different perspectives when its work product reaches Board or committee review, comment and approval, including a deliberate consideration of the effectiveness of its messaging to make BGR's work more accessible, engaging and easily understood; and
 - » Tap into broader and more diverse community connections upon public release of BGR recommendations.
- Ensure these efforts are consistent with BGR's standing as an independent research organization and in furtherance of BGR's mission of informed public policy making.
- Exhibit these organizational behaviors to improve the substance of BGR's work, and the credibility and effectiveness of the organization.

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WITH GRATITUDE

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BGR is grateful for the hard work of its 2017 Strategic Planning Committee and particularly its Chair, Ludovico Feoli, who enabled BGR's strategic planning process and thoughtfully guided it to completion.

STRATEGIC PLANNING COMMITTEE

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