

The Civic Federation's Strategic Plan

October 2024

10 North Dearborn Street, Suite 800 | Chicago, Illinois





Dear Friends,

When we launched this Strategic Planning process just three months into my tenure at the Civic Federation, our objective was to develop a vision for the Federation's future — a future that builds on our legacy of excellence, imagines the greater impact we can achieve, and leverages our unique competencies and standing in the community.

Given that the world has changed dramatically since the last strategic plan in 2012, it was vital that this process prioritize a generationally refreshed vision rather than more technically oriented implementation. The final product presented here reflects six months of collaborative work with a wide range of past and present stakeholders.

The Civic Federation's core mission – to analyze and promote sensible fiscal and governance policies and transparent practices in the pursuit of better delivery of government services – remains unchanged. However, this strategic plan provides a roadmap to deepen and expand that work. It charts a course toward increased public engagement and education, deeper subject-matter work, and stronger organizational governance and transparency.

At its heart, this strategic plan presents a unified vision of The Civic Federation's vital role and reflects the community's aspirations for our future. It lays out exciting possibilities for where we might go while giving us the flexibility to adapt to a rapidly evolving world.

The need for the Civic Federation's authoritative, nonpartisan voice is at an all-time high. We have an incredible opportunity to meet that moment while also expanding our reach to a broader audience. I am deeply grateful to join you on this journey.

My best,

Joe Ferguson





Who We Are

Our Mission

The mission of the Civic Federation is to provide objective research, analysis, and recommendations that:

- Champion efficient delivery of high-quality government services
- Promote sustainable tax policies and responsible long-term financial planning
- Improve government transparency and accountability
- Educate and serve as a resource for policymakers, opinion leaders, and the broader public





Who We Are: Forward Thinking

Our Vision

The Civic Federation's vision is that all residents and leaders in Illinois and the Chicago region are empowered with the education, insights, and fact-based research to effectively advocate for and promote sound government practices and policies.





Who We Are: Our Values

Good Government



- Promote government transparency and fiscal responsibility
- Be a resource for government leaders and promote sound policy
- Hold governments accountable to taxpayers through research, publications, and engagement

Dynamic Engagement



- Engage stakeholders to participate in civic issues to spur action and impact
- Empower an educated constituency through our research, publications, and engagement

Modeling Excellence



- Model the behavior to which we hold government accountable
- Strive for research excellence and rigor
- Exemplify effective governance and sustainable funding
- Remain trusted as an independent, nonpartisan expert



Who We Are: Our Focus

As we enter an era of strategic evolution, what remains constant is our steadfast civic leadership and commitment to provide objective research and analysis on government finance issues for the Chicago region and State of Illinois.

We will continue to produce fiscal analysis and provide recommendations on the four largest State and local government entities—State of Illinois, City of Chicago, Cook County and Chicago Public Schools. To focus on the financial challenges of these major governments and respond more nimbly to current events and policy changes, we will produce more digestible, forward-looking reports and continue to adjust our research agenda to be able to proactively respond to current events, engage government leaders and policymakers, and focus on implementation of the Federation's recommendations.

We will reinvigorate robust conversations and collaborations with partner organizations, philanthropic institutions, and members to ensure that our research remains both useful and relevant. This may take the shape of new projects, joint efforts, or deeper research into existing core areas of study.

Finally, we will expand the ways in which we communicate and disseminate our research to ensure that all Chicagoans and Illinoisans are equipped with the knowledge they need to advocate for themselves.



What We Learned

The Civic Federation should double-down on what we do best, while modernizing how we do it and to whom and how we communicate it.

Stakeholder voices were loud and clear.

The Civic Federation is known for the strength of our research, our value as a nonpartisan policy watchdog, and our ability to connect civic, community, and business leaders. Looking ahead, we will collectively reflect on the need to build on our foundation, deepening and broadening our engagement activities, diversifying our funding strategy, and modernizing our approach to governance through well-defined Board and volunteer roles.

Unfailingly, stakeholders communicated the value of the Civic Federation as a contributor to civil society, while gently urging the Civic Federation to strengthen its governance, finances, and engagement for continued success in our next chapter.

Process

These insights come via multipronged stakeholder engagement, including a constituent survey, interviews and collaborative workshops with Board members and other stakeholders, a staff workshop, and an off-site retreat facilitated by our partners at Crowe LLP.

Throughout summer 2024, we reflected on and identified themes, conflicts, and opportunities from these listening sessions and engagement activities, seeking to first understand and then hone our strategic vision.



What We Learned

Several themes emerged from stakeholder insights, ranging from what the Civic Federation does well to what stakeholders seek to modernize – engagement, governance, and sustainable funding.

5

Collaborative workshops & dialogues

150+

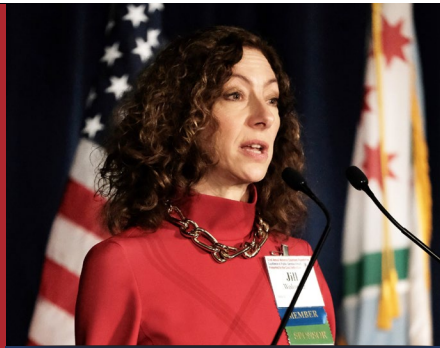
Participants: Board Members, civic and community leaders, members of the media, and event attendees

116

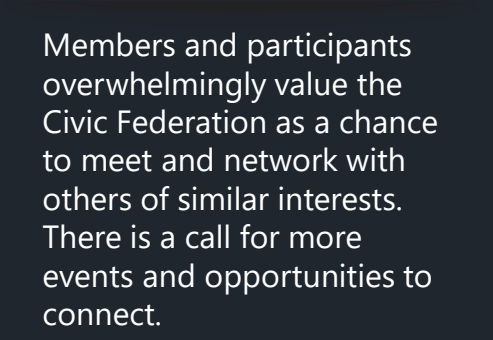
Survey respondents



When asked about organizational strengths, stakeholders resoundingly value the Civic Federation as an independent, non-partisan voice conducting relevant policy analysis.



The current funding model is both inextricably linked with the governance structure and relies on membership and a primary annual event. There is an opportunity to develop a diversified funding strategy to drive sustainable growth.



Members and participants overwhelmingly value the Civic Federation as a chance to meet and network with others of similar interests. There is a call for more events and opportunities to connect.



Many question the efficacy of current governance. There are missed opportunities to connect Board talents with organizational needs, and the large Board is functionally challenging.





What We Learned



"The Civic Federation is seen as a neutral credible voice for good public policy and fiscal responsibility."



"In a time where maintaining a non-partisan approach is increasingly difficult, the Civic Federation has the trust and confidence of both Democrats and Republicans to create shared facts to improve policy decisions."



"[The Civic Federation provides] non-partisan expert assessments of things that matter."



"[The Civic Federation has] unimpeachable integrity respecting fiscal matters in city, county and State of Illinois."





Where We Go from Here

As we enter an era of strategic change, what remains constant is our commitment to provide objective research, analysis, and recommendations on government finance issues for the Chicago region and State of Illinois. The Civic Federation will continue to deliver the high-quality, independent, non-partisan analysis we are respected and known for, as we have for the past 130 years.

As part of this continued commitment, please read the following pages to learn more about the Federation's next chapter and our four strategic focus areas:



Reimagine Engagement:

Meet the needs of new and expanded audiences



Amplify Our Voice:

Further Civic Federation's reach and impact



Stronger Together:

A new vision for our Board



Sustain Our Future:

Diversify our funding strategy





Where We Go from Here



Reimagine communication, engagement, and outreach methods to meet the informational needs of a wider audience.

We will expand our reach and boost engagement by innovating how we communicate and deliver content.

The Civic Federation is widely recognized for its decisive voice on policy issues, informed fact-based insights, and the quality of its content.

We aim to connect with a modern audience by exploring innovative ways to produce, publish, and communicate in a digital world.

The journey will include:

- Translating our work into more digestible and shareable content to expand access to knowledge.
- Exploring new multimedia formats and interactive data platforms.
- Formalizing a brand strategy and proactive campaign to re-launch Civic Federation to the community.
- Designing group-specific engagement strategies.





Where We Go from Here



Amplify the Civic Federation's impact.

Our analysis and recommendations provide important support for decision-makers and influence where our communities are heading.

The Federation's research, analysis, and recommendations have played a key role over the last 130 years in supporting policymakers and other stakeholders as they make important decisions about our City, State, and communities.

As the Federation embarks on this era of strategic transformation, our focus is to amplify our impact by closely tracking both outcomes and the broader effects of our analysis. We are committed to finding new ways to connect with decision-makers to ensure that our region can benefit from our vital work.

The journey will include:

- Communicating our progress in a relaunched Annual Report as well as regular reporting to the Board of Directors.
- Creating internal processes and a framework for advocacy and legislative work to ensure that we remain within our scope of work and our nonpartisan status.





Where We Go from Here



Stronger together – our future success depends on the strength of our Board.

We commit to refreshing our Board governance and creating a structure that will benefit the organization and its members.

The Civic Federation would not be the powerhouse it is today without the support and guidance of its members over the last 130 years. Building on this momentum, we pledge to establish a Board structure that meets the evolving needs of our organization and the community.

This includes enhancing our transparency through clearly communicated roles, responsibilities, and expectations with members.

We will also initiate structured onboarding and orientation for members, accelerating engagement so we connect their talents with opportunities.

The journey will include:

- Removing the link between governance role and membership structure
- Significantly revising the bylaws to create a new governance structure to support oversight, financial management, and fundraising.
- Establishing a formal member onboarding process.
- Regularly revising our committees and working groups to ensure that we are meeting the needs of the moment.
- Building membership to reflect the diversity of the region.





Where We Go from Here



Diversify the funding strategy to sustain our future.

We will explore sustainable funding strategies that expand and diversify our revenue streams.

The Civic Federation's funding approach has worked over the years but needs a refresh. We have experienced a plateau in funding and recognize that we are overly reliant on membership fees and special event revenue.

The journey will include:

- Expanding and clarifying membership tiers and benefits.
- Deepening ongoing and building new relationships to support multi-year commitments.
- Engaging with funders to support specific projects and general operations.
- Exploring opportunities for earned revenue, including options to license data use, certain specialized research, and new ticketed programming.





The Journey Ahead

This strategic plan is only a starting point. We recognize that substantial efforts are needed to uphold our mission and the new vision and values presented in this report. We will lean on our staff, Board, and members to keep forward momentum for the following key initiatives:



Audience

- Publishing analyses in a variety of multi-media formats
- Formalizing a brand strategy and re-launch campaign
- Designing group-specific engagement strategies



Impact

- Communicating progress internally and externally
- Creating a framework for advocacy and legislative work



Board

- Board separation of duties
- New governance structure and updated bylaws
- Formalizing member onboarding process
- Revising committee types and working groups
- Building membership to reflect the diversity of the region



Funding

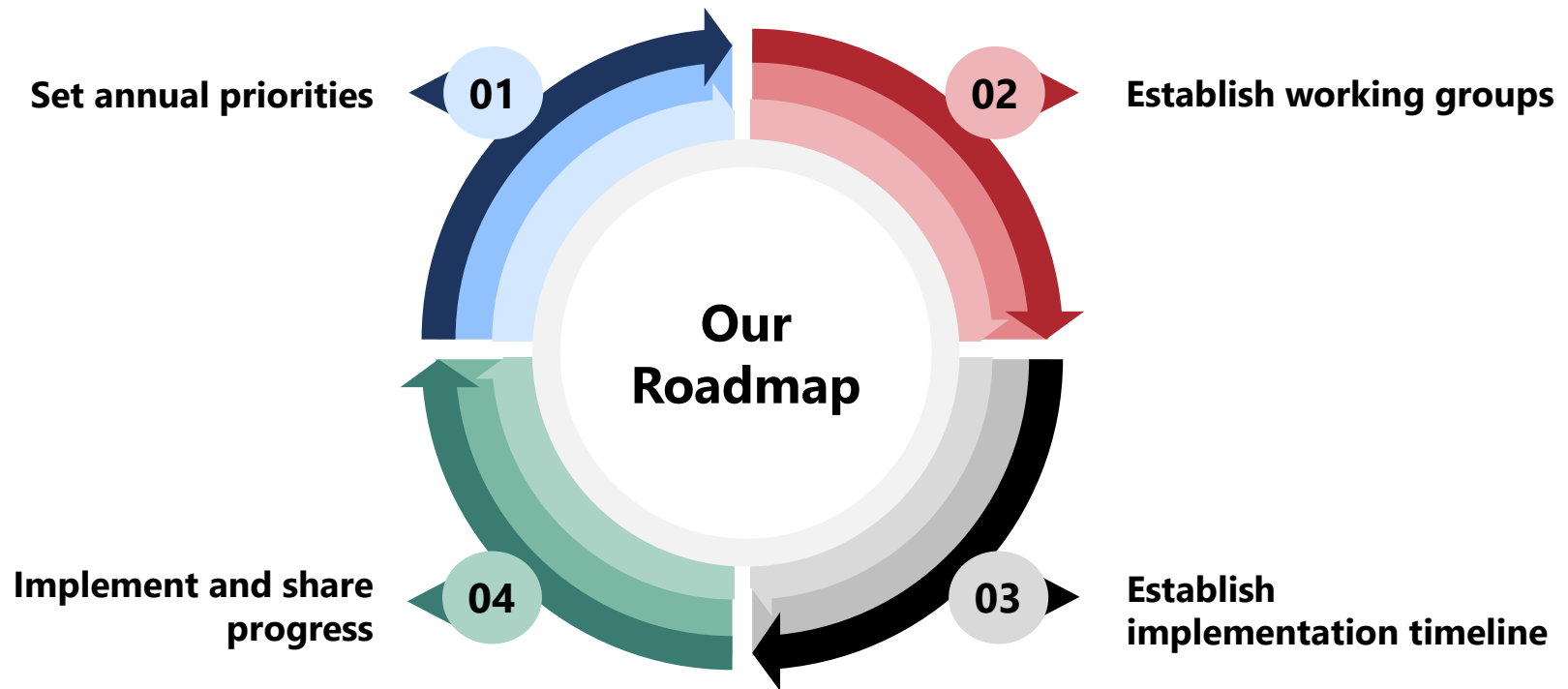
- Expanding membership tiers
- Engaging with funders to support specific projects
- Exploring earned revenue options



The Journey Ahead

The years ahead will see an iterative process of prioritization, planning, and implementation of key initiatives. This will include developing both long-term and annual timelines and priorities, establishing working groups to drive progress, and providing regular progress reports.

We look forward to the journey ahead and to sharing it with you.





Acknowledgements

The Civic Federation gratefully acknowledges the time, passion, and constructive input from all who participated in our strategic planning.

We especially thank members and community advocates who completed the Engagement Survey, and individuals listed below who dedicated time to one or more sessions to share their insights.

Participating Civic Federation Board of Directors, Trustees, and Council of Advocates

Elizabeth Betten	Bert Nuehring
Kristin Carlson Vogen	Donovan Pepper
Lew Collens	Sylvia Puente
John DeBlasio	Scott Saef
Stephen Friedman	Rebekah Scheinfeld
Phil Hale	Brian Septon
Julie Hamos	Barbara Stewart
Lori Healey	Kent Swanson
Adam Hoeflich	Tom Vanden Berk
Stephen Koch	Simon Wlodarski
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Monica Mueller	

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Justin Marlowe
Lou Sandoval

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Susannah R.K. Heitger
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Shannon Madden
Renae Peden
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Contact Us

To find out more about our work and to connect with our team.



The Civic Federation



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Newsletter**



**Learn About
Membership**



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