



Forward!

A Strategic Plan for
The Council of State Governments

UNITED FOR EXCELLENCE · DECEMBER 2021



PART I

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Jason Moseley
DEPUTY DIRECTOR/GENERAL COUNSEL

Jill Springate
CHIEF OPERATIONS OFFICER

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PART II
CSG Strategic
Planning Initiative

Forward!

Dear Friends,

My home state, Wisconsin, adopted “Forward” as its official motto 170 years ago. With just a single word, the motto points us to the future, one defined by the high aspirations and grand ambitions of the Badger State. In that same spirit, The Council of State Governments, firmly grounded in the present but always preparing for the future, is moving forward.

At the center of the Wisconsin coat of arms and state seal are the words, “E Pluribus Unum,” our nation’s motto meaning, “Out of many, one.” Embodying that motto, CSG unites the states together with one purpose: to create a more perfect union. While CSG has many component parts, it has only one focus: to help the states achieve more together than they could ever achieve on their own.

In December 2019, I had just accepted the gavel as CSG national chair when I launched a national strategic planning process to define a path forward for CSG. While CSG has enjoyed nearly 90 years of sustained excellence, I remain confident that the best days for CSG are still yet to be.

I am proud to share with you in the pages that follow a new national strategic plan for CSG. This plan was crafted using a rigorous examination of organizational strengths and opportunities.

We know that the future doesn’t just happen. It is defined by the choices we make today, and with the help of a dedicated planning team, the input and advice of many members and stakeholders and the support of a great staff, we are pleased to present a strategic plan to help guide CSG into a promising and productive future.

We live in a historic moment. In the last year, overlapping crises have transformed nearly every aspect of American life and with it, the issues being deliberated by state governments. The world has changed a great deal since we initiated the planning process, but as unprecedented events unfolded over the past year, CSG adapted and met the moment. In doing so, CSG demonstrated its considerable strengths and impressive resiliency.

CSG can lean into these strengths as it plans for the future. But the complexity of the public policy challenges states face today and in the years ahead call on CSG to develop new products and services to help states better navigate the future.

Strategic planning doesn’t end for CSG with the publication of this plan. In fact, the most important part of this process is just the beginning. CSG leaders look forward to working with our management team, staff, partners, funders and stakeholders to implement this plan. In that work we will help CSG evolve to better serve the needs of its member states.

I look forward to moving forward, together.



Joan Ballweg

JOAN BALLWEG
Wisconsin State Senator and 2020-21 CSG National Chair

A note from Katharine Pearson Criss, strategic planning consultant

Dear CSG Leadership Council,

Strategic planning is about change. Vibrant and established organizations benefit from taking a close look at the work from within and from outside the organization in order to ensure longevity and excellence going forward.

After gathering input from their constituency, the leadership and the staff will carry out the work of change for the organization. New pathways will be adopted to launch the organization into the future, and over time the organization will reap benefits from this often difficult process.

Strategic planning is not easy. The leadership of the nonprofit organization is often challenged to examine how work can be done better, faster and more streamlined — especially in the current landscape of such an extraordinary moment in history.

The first step in strategic planning is to affirm, clarify and restate the Vision and Mission of the organization. Once done, it is important to articulate and share the Values on which the organization is based. This step is an opportunity to test current operations in a critical way. And then the real work begins — how does the organization manifest these bedrock beliefs?

This document sets forth new ideas, improved efficiencies and ways to clarify the operational roadmap in four major areas: Program Development, Management/Structure/Governance, Resource Development and External Environment.

These areas are the building blocks of a nonprofit, public institution:

- I. Program Development: Why does the organization exist? What does it do that is relevant and important to the public?
- II. Management/Structure/Governance: How does the organization do it? What is the methodology for governing and making decisions? Who's in charge, and is it clear to the constituency?
- III. Resource Development/Fundraising: How is the organization supported and why? What is required to carry out the programs and achieve the vision? Does the organization have a broad base of support and if not, why?
- IV. External Environment: What is the opportunity to make known to the broader public the brand of the organization, and how does the organization make known its best self? What is the human face of the organization, and how is it made known?

These are the key divisions of concentration when looking at a new way FORWARD for CSG. They serve and support the Vision, Mission and Values.

Finally, a strategic plan is an ever-evolving document. When goals are achieved, when action steps are completed, the leadership eliminates these items from the plan and adds new ones. The best strategic plans live and breathe to always move the organization into the future — ever hoping to achieve its vision.

Many thanks to all who have participated, who have given their time and talent to craft a new plan and who are committed to making CSG the one organization united for all.

Sincerely,



Katharine Pearson Criss

KATHARINE PEARSON CRISS

Strategic Planning Committee Members

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WASHINGTON

Hon. Vicki Schmidt
INSURANCE COMMISSIONER | KANSAS

Trina Sheets
EXECUTIVE DIRECTOR | THE NATIONAL
EMERGENCY MANAGEMENT ASSOCIATION

Sen. TJ Shope
ARIZONA

Sen. Elgie Sims
ILLINOIS

Director Tom Stickrath
DEPARTMENT OF PUBLIC SAFETY | OHIO

Hon. David Williams
CUMBERLAND CIRCUIT COURT | KENTUCKY

Focus Group Participants

Sen. Stuart Adams
Senate President
UTAH

Former Rep. Jeni Arndt
Mayor of Fort Collins
COLORADO

Raul Burciaga
Director, Legislative Council Service
NEW MEXICO

Sen. Becca Balint
Senate President Pro Tempore
VERMONT

Sen. Sharon Carson
Senate President Pro Tempore
NEW HAMPSHIRE

Del. Mark Chang
MARYLAND

Roger Collins
SUNOVION

Andy Corsig
PHRMA

Former Rep. Kimberly Dudik
MONTANA

Rose Feliciano
THE INTERNET ASSOCIATION

Rep. Randy Fine
FLORIDA

Sen. Vin Gopa
Senate Minority Conference Leader
NEW JERSEY

Jon Ros Grayson
HCA HEALTHCARE

Former Gov. Gary Herbert
UTAH

Sen. Ken Horn
MICHIGAN

Sen. Keith Ingram
Senate Minority Leader
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Assemblyman Gordon Johnson
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NEW JERSEY

Rep. Clark Kauffman
IDAHO

Helene Keeley
Deputy Director
STATE LOTTERY | DELAWARE

Rep. Brigid Kelly
OHIO

Rep. Kim Koppelman
Speaker Of The House
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Sen. Joan Lovely
Senate Assistant Majority Leader
MASSACHUSETTS

Rep. Chuck Martin
GEORGIA

Rep. Patricia McCoy
House Minority Leader
VERMONT

Sen. Carolyn McGinn
KANSAS

Assemblywoman Daniele Monroe-Moreno
Assistant Majority Floor Leader
NEVADA

Mike Mower
Senior Advisor of Community Outreach &
Intergovernmental Affairs
OFFICE OF THE GOVERNOR | UTAH

Secretary of State Paul Pate
IOWA

Sen. Janet Petersen
IOWA

Mike Prentiss
THE PROCTER & GAMBLE COMPANY

Sen. Gary Stevens
ALASKA

Sen. Robert Stivers
Senate President
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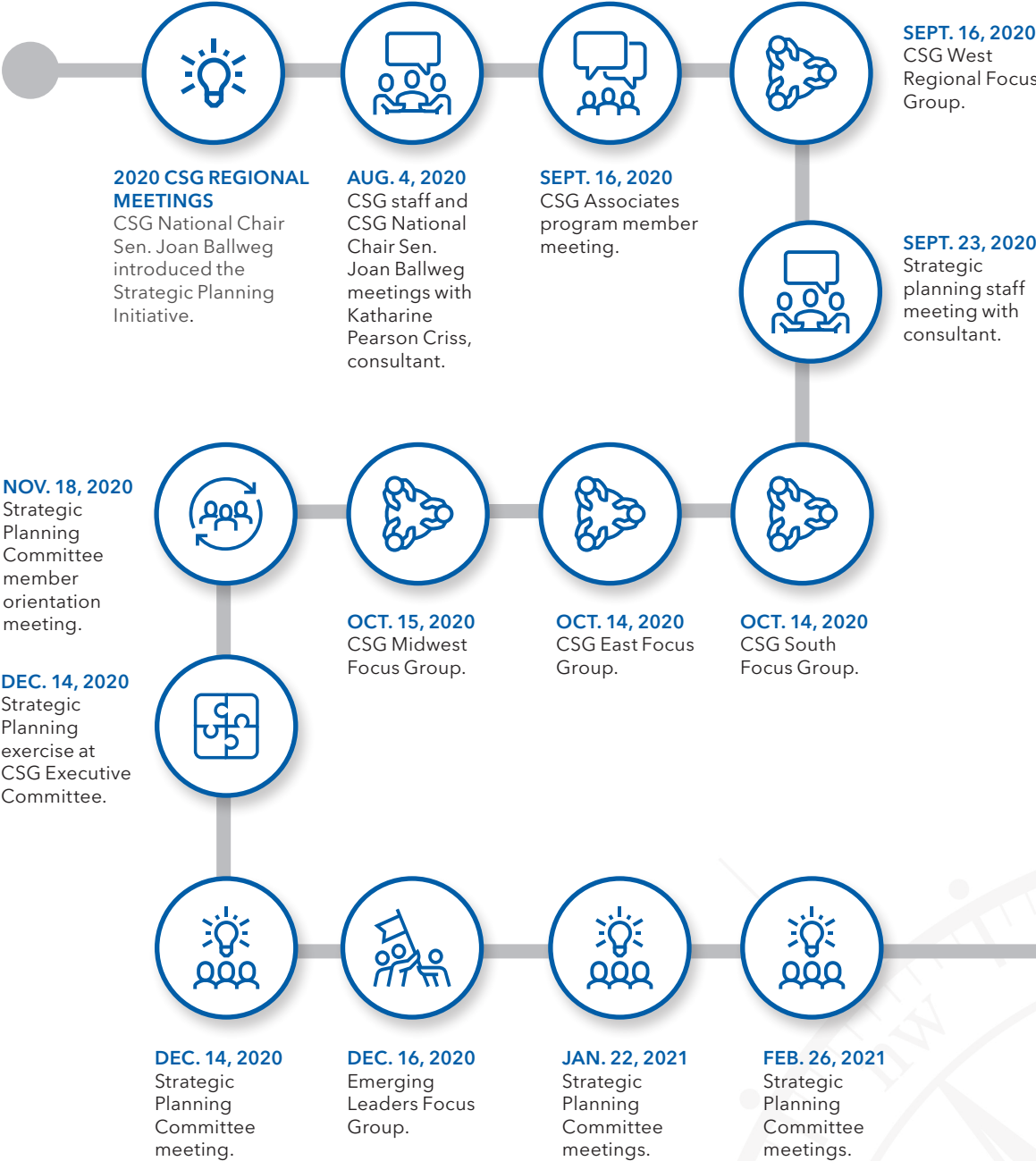
Sen. Larry Teague
Senate Minority Whip
ARKANSAS

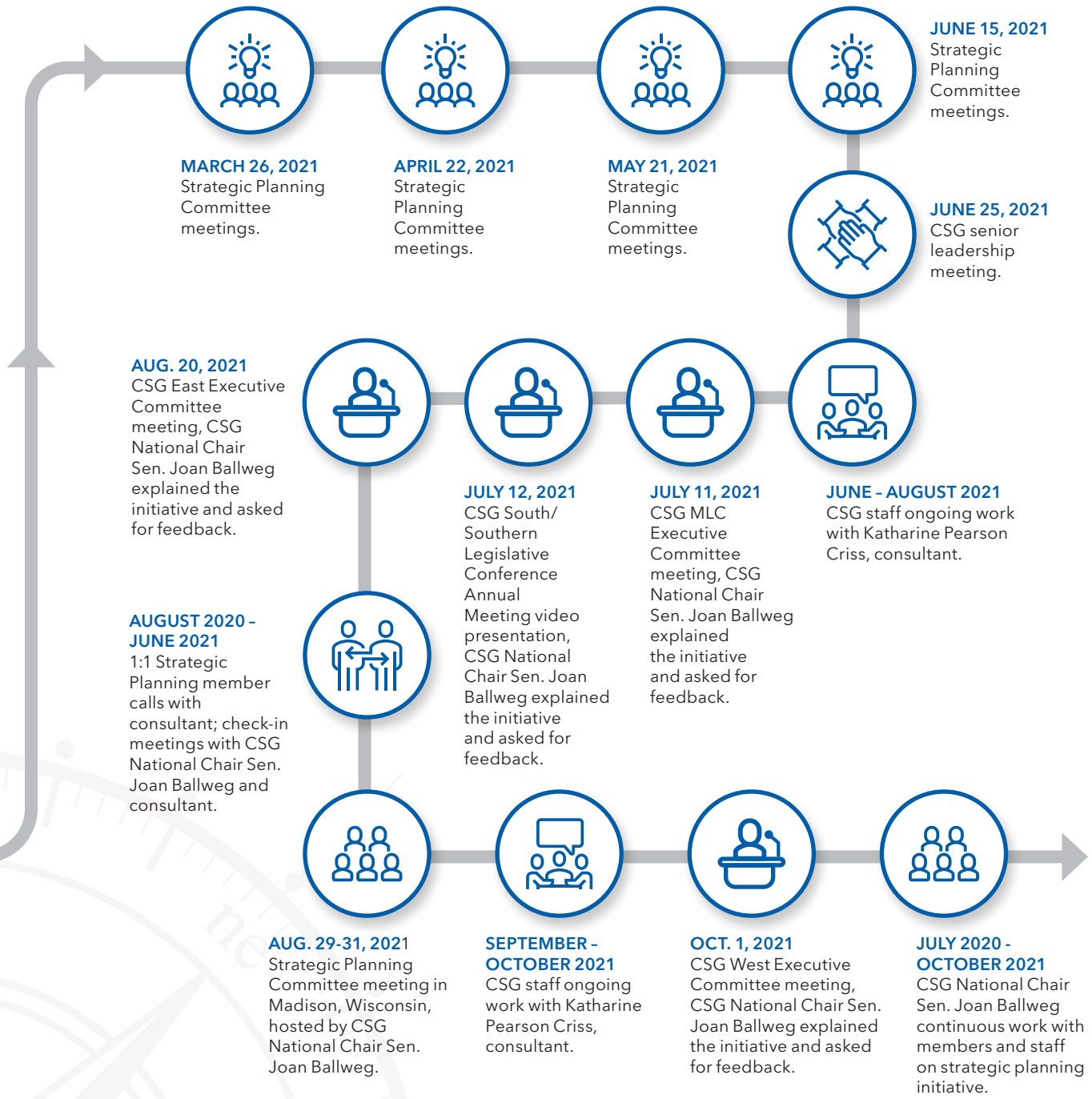
Former Rep. Kitty Toll
VERMONT

Former Sen. Cam Ward
Director, Bureau of Pardons and Paroles
ALABAMA

Tony Wilson
MICROSOFT CORPORATION

Strategic Planning Process Timeline







PART III
Where We Stand

Where We Stand: A Situational Analysis of CSG Strengths and Opportunities

The Council of State Governments was created by the states as a trusted forum to foster productive relationships, to grow the competence of state officials and to enhance the performance of state governments. An early motto for CSG echoed the purpose upon which our nation itself was founded: "Toward a more perfect Union."

For nearly nine decades, CSG is where people of purpose come together to pursue their passion for public service.

Kansas Gov. Laura Kelly, 2020-21 CSG national president, summed it up when she said, "CSG is where politicians learn to be public servants."

While much has changed since the founding of CSG in 1933, much remains the same. State officials then, as now, look to CSG to provide:

- A welcoming and inclusive, nonpartisan network of peers from other states and other branches of state government.
- Opportunities to grow leadership skills.
- Forums to learn and share promising and proven solutions to public policy challenges.
- Insights to improve the performance of state government.
- Forums to design, implement and administer multi-state solutions.
- Advocacy for the interests of the states in our federal government.

At the core of the CSG value proposition is its unique and unparalleled ability to bring state officials together to network and learn from each other and thereby empower them to better govern their states.

CSG works for the states.

CSG is not separate and apart from the states, it is an association of the states. The states themselves are the members of CSG. The work of the council is governed by a broad cross section of state officials and is carried out by nearly 250 dedicated staff members in eight offices across the country.

CSG is not a vendor nor is it an advocacy organization. Its priorities are determined by state officials. CSG is governed by state officials. The organization's budget is built on dues set and paid by the states. Simply put, CSG is an extension of state government with one goal: to anticipate and serve the needs of state officials.

CSG is member driven and governed. Its priorities are determined by state officials, and CSG is led by state officials. While CSG has many partners and stakeholders, it is governed exclusively by its member states.

CSG recognizes and honors its obligation to be a good steward of public funds invested in its programs and services.

The four CSG regions are catalysts for networking, skill development, information sharing and issue analysis with a focus on the priorities of state officials in each region. The region-forward design of CSG is an essential strength of the organization.

CSG national programming brings extraordinary expertise to the states through the CSG Justice Center, the CSG Center of Innovation and the National Center for Interstate Compacts.

At both the regional and national levels, CSG monitors the actions and outcomes of state government to determine what works and then shares these learnings so that all states may benefit from the experiences of other states. In this way, CSG harvests the best lessons from the "laboratories of democracy" to enhance government performance.

Life-changing leadership development opportunities are offered to state officials at the regional and national level.

CSG celebrates success and champions excellence in state government and promotes the many ways state officials make a difference as they work to solve problems and produce results.

CSG is strictly nonpartisan.

CSG is an association of all state officials, elected and appointed, in all three branches of state government. While some of CSG programs help state officials better understand how political trends and events influence state government, the organization's public policy work is data-driven, consensus-based and conspicuously nonpartisan.

CSG convenings welcome state officials regardless of political party, geography or ideology. Inclusion of all voices and a diversity of opinions is encouraged in the work of CSG.

The CSG data-driven approach to public policy provides a common, agreed upon set of facts which help guide policy discussions and to drive consensus.

CSG is resilient and adaptable.

A great strength of CSG is its adaptability. CSG is notoriously agile. As new priorities emerge or as emergencies arise, the organization has demonstrated the ability to meet the moment and redirect its focus. This ability allows CSG to be a ready partner as the needs of the state officials change. Founded in 1933, CSG continues to thrive because it has consistently innovated in the face of hardship and found new ways to assist the states during challenging times.

CSG is also forward thinking. While state officials are necessarily focused on responding to the most pressing issues facing their state, CSG has the capacity to anticipate what's next and engage state leaders to better prepare for the future.

CSG is a trusted partner.

CSG delivers more value to the states by partnering with other institutions and individuals who share its commitment to advance the common good. By being a trusted partner, CSG earns the support of private sector, philanthropic and government funders whose resources enhance the impact of CSG.

The future.

While CSG has grown and adapted to address ever-evolving and increasingly complex public policy challenges, CSG works to bring the states together through nonpartisan, evidence-based public policy analysis, and robust training and experiential learning opportunities. CSG champions the exceptional public servants who guide state government and the impressive results their leadership achieves.

In this time of transitions and transformation, CSG has never been more needed than it is now. It is an exciting time to consider what's possible and go about the task of building an even stronger, more resilient and impactful CSG. This strategic plan will help guide those efforts, and I am grateful to all of the state officials who offered their time and input to the strategic planning effort. I look forward to working, consistent with CSG core values, to achieve the CSG mission and move CSG closer to its vision.



DAVID ADKINS

Executive Director/CEO

The CSG Way

Community

We are an inclusive family.

We embrace diversity of perspective and treat all with equity, dignity and respect.

We create and maintain a space for constructive and civil dialogue and debate.

We advance member derived and directed priorities.

We give voice to the states and the institutions of government.

We celebrate the leadership of state officials.

Integrity

We are a trusted and impartial partner to the states.

We conduct our work with authenticity and fidelity to our members and mission.

We are transparent in every aspect of our work.

We are accountable to our members, our partners and our colleagues.

We provide unbiased analysis and delivery of information and programming.

We share curated and trusted sources of data and information so that states may determine their best path forward.

Excellence

We foster excellence in state leaders and in our employees.

We do not compromise quality for the sake of expediency.

We are an agent of change by advancing sound ideas and proven solutions no matter the barriers.

We are a good and effective steward in managing state and partner resources.

We measure our impact and emphasize a focus on results in our programming and organizational administration.

We strive for continuous improvement in all that we do.

Innovation

We facilitate, develop and advance innovative ideas and programming.

We build partnerships with those that share our vision, contribute expertise to our mission and serve as a resource for our work.

We embrace the intersection of public policy and private voice.

We foster a sense of urgency in driving effective change.

We create new knowledge and build new skills to empower state officials to achieve results.

CSG National Programs and Services 2021

CSG Henry Toll Fellowship

The CSG Henry Toll Fellowship convenes select top officials from all three branches of state government for a leadership boot camp designed to stimulate personal assessment and growth while providing networking and relationship-building opportunities.

CSG Associates Program

The CSG Associates Program allows representatives from the private sector, from nonprofit organizations and from national trade associations to offer their perspectives to public sector members.

CSG Publications

CSG produces several publications to support state leaders including *CSG Capitol Ideas* magazine, the weekly *The Current State* e-newsletter and the annual *The Book of the States*. It also provides resources and updates on the web and through social media platforms including Facebook and Twitter.

CSG Center of Innovation

The CSG Center of Innovation is a policy resource center for the states, and more than 6,000 CSG members have been involved with its work since it launched in 2018. COI empowers state government leaders by providing evidence-based, nonpartisan assessments of existing legislative and regulatory efforts and by identifying best practices and future opportunities to address policy challenges. The following are operations of COI:

- **Customized, Rapid Research Direct to Members** — COI conducts customized research on a wide range of policy topics in response to member requests, and it proactively develops resources for state policymakers on the most pressing policy topics.
- **Healthy States National Task Force** — This initiative brings together 80 state officials and CSG Associate members to identify solutions to the challenges faced by states as a result of the COVID-19 pandemic. The task force is focusing on four key policy areas: civic health, economic and workforce health, fiscal health, and human health.
- **Occupational Licensure Policy and Interstate Compacts** — This program assists states in solving problems caused by variation among state occupational licensing policies. Projects include: Occupational Licensure, Veterans Accelerated Learning for Licenses

Occupations, National Center for Interstate Compacts, and Department of Defense Interstate Compact Support.

- **Workforce Development Policy** — This team supports state policymakers to improve the quality and quantity of employment opportunities in states. Projects include: State Exchange on Employment and Disability, Center for Advancing Policy on Employment for Youth, and The Apprenticeship Policy Learning Consortium.
- **Elections Policy** — This policy team focuses on policy issues including overseas voting, election security and combatting misinformation in state and national elections. Projects include: Overseas Voting Initiative.
- **Health and Human Services Policy** — This program focuses on policy subjects that impact the health and wellbeing of citizens across all 50 states. Its projects include: WIC Special Project Innovation and State Mental Health Policy.

CSG Justice Center

The CSG Justice Center works to develop research-driven strategies to increase public safety and strengthen communities. It is committed to being independent and nonpartisan, to providing rigorous, trusted, high-quality analysis, to developing practical and innovating solutions informed by data and research, to promoting collaboration and building consensus, and to being inclusive and respectful of diverse views and experiences. Current projects include:

- **Law Enforcement - Mental Health Collaboration** — Provides technical assistance to law enforcement agencies and the communities they serve to assist in setting up and expanding effective first response to people who have mental illnesses.
- **The Justice and Mental Health Collaboration Program** — Facilitates collaboration among the criminal justice, juvenile justice and mental health and substance use treatment systems to better serve people with mental illnesses and increase public safety.
- **Stepping Up** — A national initiative to reduce the number of people with mental illnesses in jails.
- **Improving Outcomes for Youth** — Works with state and local jurisdictions to align their policies, practices and resource allocation with what research shows

works to reduce recidivism and improve outcomes for youth while enhancing public safety.

- **Justice Reinvestment** — A data-driven approach to improve public safety, cut unnecessary corrections and related spending and reinvest savings in strategies that decrease crime and reduce recidivism.
- **Expanding Economic Mobility** — Assists people reentering communities from prison and jail in order to help break the cycle of incarceration. Works with state policymakers to examine and dismantle unnecessary policy barriers to employment and education opportunities for people with criminal records.
- **Justice Counts** — A national, consensus-building initiative bringing together an unprecedented coalition of state and local leaders to enhance policymakers' decisions by making criminal justice data less disjointed and more timely and actionable.
- **Course Corrections** — This initiative aims to provide states with impactful data, tools and policy options to help criminal justice leaders immediately navigate the sudden fiscal and systemic challenges they face.

CSG Policy Academies

The CSG Policy Academy series provides customized training and a deeper dig on critical policy topics facing the states. Policy Academies allow CSG to identify emerging areas of public policy as novel issues arise in the states and provide maximum flexibility to recruit state policymakers from member jurisdictions to participate with CSG. Select state officials focused on the respective policy issue are invited for an intensive educational and networking experience. CSG Policy Academies are also held in conjunction with the CSG National Conference. Past Policy Academies include State Medicaid Programs 101, Medicaid Leadership, Privacy and Cybersecurity, Energy Landscape, Veterans, Cannabis, Chronic Diseases, and Sustainability.

21st Century Foundation

The 21st Century Foundation is an internally administered fund designed to support diverse programs conducted by and through CSG that strengthen the performance of member jurisdictions.

CSG Forecast for Legislative Leaders

The CSG Forecast for Legislative Leaders convenes legislative chamber leaders in a trusted, nonpartisan environment of peers to discuss emerging public policy issues facing the states, examine fiscal forecasts and gain insights on how to best lead and govern during times of unparalleled disruption and constant evolution.

CSG University

CSG University helps newly elected legislators find success in their new roles. The program introduces new legislators to peers from around the country who share their same passion for public service.

CSG Interbranch Affairs Committee

The Interbranch Affairs Committee reviews and monitors interbranch issues and seeks to foster collaboration and understanding between and among the branches of state government.

CSG Intergovernmental Affairs Committee

The Intergovernmental Affairs Committee reviews and monitors major intergovernmental issues and relevant court cases and decisions impacting the states.

CSG International Committee

The International Committee is responsible for coordination and development of activities in the international arena of importance to the U.S. states.

CSG Shared State Legislation

With the goal of sharing innovations in state policy, the Shared State Legislation Committee identifies, curates and disseminates state legislation on topics of major interest.

CSG Meetings and Convenings

The greatest strength of CSG is its power to convene state leaders from a diverse set of backgrounds, geographies, ideologies and communities in a collegial and stimulating environment. CSG knows that when state leaders are in the room together, good things happen. Annual meetings include members, ingenuity from the private sector participation and data from the academic institutions and nonprofit community.

CSG 20 Under 40 Leadership Award

Each year, the CSG 20 Under 40 Leadership Award recognizes the outstanding work of 20 up-and-coming elected and appointed officials from across the country who not only exemplify strong leadership skills but have also demonstrated a true commitment to serving the citizens of their state/territory.

Big 7 Organizations

CSG is a member of a network of nonpartisan, nonprofit organizations known as the Big 7 that represent state and local governments. In addition to CSG, the group is comprised of the International City-County Management Association, the National Association of Counties, the National League of Cities, the National Conference of State Legislatures, the National Governors Association and the U.S. Conference of Mayors.

State and Local Legal Center

The State and Local Legal Center files amicus curiae briefs in the U.S. Supreme Court in support of the states and local governments. It also conducts moot courts for attorneys arguing before the Supreme Court and is a resource to state and local governments on the Supreme Court.

State Services Organization

State Services Organization is a nonprofit organization in Washington, D.C., that began in 1976 as a joint venture between The Council of State Governments, the National Governors Association and the National Conference of State Legislatures, who combined resources and office space needs to become the largest tenant in the Hall of the States. SSO provides office space, association management, accounting services and conference and technology services to other nonprofits, associations and educational organizations as well as states who seek to have a presence in D.C. in close proximity to the Capitol.

CSG Legal Task Force

The CSG Legal Task Force is a standing committee comprised of 12 public sector members, three appointed from each region, that review federal cases, frequently those accepted by the Supreme Court, for issues that may impact the states or that involve issues of federalism. The Legal Task Force determines by majority vote whether CSG will sign on to an amicus curiae brief.

CSG Affiliated Organizations

Through affiliation with CSG, 11 national organizations of state officials share ideas and combine efforts to accomplish mutual goals. Affiliated organizations contribute specialized expertise, information and resources to the overall mission of CSG. In turn, affiliated organizations can tap into CSG products and services and utilize a forum for bringing issues to a broader, collective audience. CSG affiliated organizations include:

- **National Association of State Technology Directors** — NASTD supports state IT management officials through regional seminars, annual conferences and other tools.
- **National Emergency Management Association** — NEMA supports state emergency management personnel through interactive forums, standing policy committees and the Emergency Management Assistance Compact.
- **National Hispanic Caucus of State Legislators** — NHCSL serves and represents the interests of Hispanic state legislators from all states, commonwealths and territories of the U.S. through ongoing policy task forces and its Board of Business Advisors.
- **State International Development Organizations** — SIDO supports governors' international trade agendas by representing the 50 state trade agencies to the federal government, and it provides resources to state members such as a state trade directory and forums.
- **Women In Government** — WIG is a nonpartisan organization of women state legislators that provides leadership opportunities, expert forums and educational resources to address complex public policy issues to all women state legislators.
- **Association of Air Pollution Control Agencies** — AAPCA is a consensus-driven organization focused on assisting state and local air quality agencies and personnel with implementation and technical issues associated with the federal Clean Air Act.
- **American Probation and Parole Association** — AAPA supports corrections professionals through their training and leadership institute programs as well as specialized services such as customized research and technical assistance for the corrections industry.
- **Military Interstate Children's Compact Commission** — MIC3 oversees the Military Interstate Children's Compact and brings together federal and state leaders to discuss and share resources on key issues affecting military families.
- **National Association of State Facilities Administrators** — NASFA supports state facilities professionals through ongoing webinar opportunities, an interactive knowledge exchange center and resources sharing best practices on key issues for facilities administrators.
- **National Association of State Personnel Executives** — NASPE provides support to state governmental human resource professionals through research and hosting convening opportunities that involve top subject matter expert speakers and round-table member dialogue.
- **Cannabis Regulators Association** — CANNRA provides government jurisdictions with unbiased information to help make informed decisions when considering whether or how to legalize or expand regulated cannabis.

Where We've Been: A Historical Overview of CSG

The Council of State Governments was born on the evening of Oct. 22, 1933, when a small group of state legislators gathered in a room at the Penn Harris Hotel in Harrisburg, Pennsylvania. There's no record of the meeting; CSG founder Henry Toll recalled it 25 years later.

"Probably 12 or 15 of us sat around a table in a small room," Toll said. "The Council of State Governments had never been heard of before that day."

The legislators at the meeting were the Board of Managers of the American Legislators Association, an organization Toll founded in 1925. A Colorado state senator from 1922 to 1930, Toll established ALA to provide legislators information and help them connect across state lines to study "legislative technique." One of his first items of business was to compile a list of all 7,500 state legislators in the country, a roll that did not exist until Toll put one together.

A League of States

By 1933, however, the scope of the ALA's activities had widened. The organization held its first annual Interstate Assembly in February, and it had become apparent for states to work together on interstate issues and collectively with the federal government that state administrative officials would need to be a part of a state organization. The Board of Managers asked Toll to draft articles for such a league of states.

In a letter he wrote to board members in September, a month before the Harrisburg meeting, Toll explained that the ALA's role was evolving. No longer solely a service organization for legislators, ALA was also engaged in undertaking "an attempt for harmony in state activities between state and state, and between state and nation.

"By the time that Interstate Assembly was organized, it had become clear that in the performance of the second function (harmony), it is not only proper to have executive administrative state officials participate with the legislators — it is absolutely necessary."

The board members, who were in Harrisburg that October attending a two-day conference on interstate bus and truck laws, supported Toll's call for a new league of states.

"After a few minutes discussion," Toll wrote in 1958, "the board adopted, without amendment, some Articles of Organization I had written in the Chicago office for an institution named the League of State Governments."

Although the board did not amend Toll's articles of organization, it did make one significant change: Members wanted the new group to be known as The Council of State Governments. Toll later explained that some board members didn't want the organization identified with the League of Nations, the controversial international peace-keeping body that the United States did not join.

Affiliates

CSG, even in its infancy, was an organization adapting to the needs of state governments. The new articles called for affiliations with a cross section of state organizations.

Original affiliates included the National Association of Attorneys General, the National Association of Secretaries of State, the Governors' Conference, the National Association of State Auditors, Comptrollers and Treasurers, and the National Conference of Commissioners on Uniform State Laws. The presidents of all those organizations were part of the original CSG 25-member Board of Managers, which also included six state legislators, six executive branch officials and six state officials drawn from any branch of government.

By 1939 the new organizational structure was recognized for its efficiency. In a Jan. 20, 1939, editorial, The New York Times cited the council's success in facilitating the interstate compact between New York and New Jersey that established a joint authority over the Palisades Interstate Park and the creation by five states of the Interstate Commission on the Delaware River.

"Notice the fitness of the machinery for the job," the editorial read. "The commission members of state legislatures will look after the necessary laws. The administrative members will execute them. CSG is a practical machine of information and action, highly useful in a day of complex problems."

An Organization Takes Root

During the next couple of years, Toll and his staff of 15, based in their Chicago headquarters in the ivy covered building at 850 East 58th Street, devoted their energies to developing CSG as an organization. They moved along parallel tracks, providing services for the state constituencies while at the same time securing the organization's legitimacy among the state governments.

A resolution drafted by state Sen. Joseph G. Wolber of New Jersey served as model legislation establishing in each state a State Commission of Interstate Cooperation comprised of Senate and House members appointed by their leadership, and administration officials appointed by the governor. New Jersey was the first state to adopt a commission that declared CSG to be a state agency and that pattern was used by most other states.

Meanwhile, Toll and his Chicago staff continued providing state officials with services that had been initiated earlier through the ALA. One service was the Interstate Reference Bureau, which served as an information clearinghouse for state legislators and was now expanded to function as a reference source for all state officials.

CSG also continued publication of its monthly journal, changing the name from *American Legislator* to *State Government* to reflect the broader role of the organization.

The year 1935 was an important milestone in the history of CSG. The articles of organization called for opening up to 10 regional offices and Toll rented a New York office at the Fifth Avenue Building of the Guaranty Trust Co. at 44th Street. In addition, the organization established an office in Washington, D.C.

And 1935 was the year the first edition of *The Book of the States* was published. *The Book of the States* remains the premier reference book about state governments.

Establishment Secured

It wasn't until 1938 that Toll believed CSG had become a permanent institution. Two developments that year solidified the organization's role in the community of state governments. On April 16, CSG and several other state service organizations sharing offices on East 58th Street moved into new headquarters at 1313 East 60th Street. The new headquarters was built on land donated by the University of Chicago with construction funds provided by the Spelman Fund. The building would serve as CSG headquarters for more than 30 years.

The other milestone in 1938 that secured CSG as an institution was the appointment of Frank Bane as executive director. Toll, who had guided CSG from the beginning,

wanted to return home to Denver. Bane was Toll's hand-picked successor. He recruited Bane from his position as the first director of the Social Security Board, which later became the Social Security Administration. Toll returned to his private law practice in Denver but remained active in CSG as its honorary president until his death in 1975.

CSG that year also became the secretariat for The Governors' Conference. The conference had no offices and the part-time services of former Florida Gov. Cary A. Hardee. When Hardee retired in 1938, the conference affiliated with CSG. The partnership lasted until 1975 when the conference renamed itself the National Governors Association and set up headquarters in Washington, D.C.

SSL and More Regional Offices

In 1940, at the request of the Roosevelt Administration, CSG met with federal officials to devise plans to aid states in developing legislation that would dovetail with the federal government's defense efforts at the dawn of World War II. This led to the establishment of the Suggested State Legislation Committee, later Shared State Legislation. Throughout the war, CSG used the work of SSL to organize state defense councils, develop the policies and administer the Selective Service system, and establish state guards to replace members of the National Guard called into federal services.

Following the war, SSL broadened its work and continues to address contemporary challenges to state governments such as legislation regarding antiterrorism, identity theft and predatory lending practices.

Post-War Activities

The post-war period also brought about the expansion of the CSG regional presence. With the Eastern Regional Conference well established since 1935, regional leaders in the Midwest, South and West organized regional conferences in the mid-1940s.

For the first 25 years of CSG operations, *State Government* served as the organization's monthly magazine. In response to the needs of state officials who wanted more news on state activities and reports on important issues, *State Government News* was created in 1958 and *State Government* became a quarterly publication dealing with policy issues in depth. In 1992, *State Government* became *Spectrum: The Journal of State Government* and continued under that name until publication ceased in 2004. *State Government News* became *State News* in 2004 and eventually its present title, *Capitol Ideas*, in 2010.

Executive Directors

In 1958, Frank Bane retired after 20 years as CSG executive director. Named to replace him was Brevard Crihfield, who would fill the role for 20 years. Crihfield had served in the Washington office, the New York office and was the Midwest regional representative before becoming CSG executive director. During his tenure, he directed the expansion of CSG services and supervised the move of CSG headquarters from Chicago to Lexington, Kentucky. Crihfield retired in 1977 and was replaced by Herbert L. Wiltsee, who served 18 years as director of the CSG Southern office. He joined CSG in 1942 as director of research and publications. He retired in 1978.

William J. (Pete) Page Jr. became the fifth executive director of CSG in 1978, followed by Frank H. Bailey in 1980 and Carl W. Stenberg in 1983.

In 1989, Daniel M. Sprague, director of the CSG Western office, was named the eighth executive director of CSG. Sprague undertook the expansion of the headquarters office. David Adkins, a former state legislator, was named executive director/CEO in 2008. Under his leadership, the CSG headquarters building underwent a major renovation, and he has guided the staff through the Great Recession and the COVID-19 pandemic.

NGA and NCSL Establish New Homes

In 1975, CSG underwent a major organizational change. The Governor's Conference, now the National Governors Association, established its own secretariate in 1975 and moved those services to Washington, D.C., along with the National Association of State Budget Officers.

That same year, the National Conference of State Legislators was established when three legislative organizations, including the National Legislative Conference of CSG, merged and opened its headquarters in Denver.

Evolving Programs and Services

In 1983, CSG began the CSG Associates program to provide the private sector opportunities to network and exchange ideas with CSG public sector members. In 1994, the 21st Century Foundation was created to bring public and private sector members together to help direct funds for priority initiatives.

The premier CSG leadership development program began in 1986. The Toll Fellowship Program continues to attract the brightest state officials from all three branches of state government to equip them with the skills and strategies to meet the challenges ahead.

In 2006, the CSG Justice Center, which started as a program of CSG East, became a national CSG initiative. Now, with over 100 employees, the CSG Justice Center, guided by an advisory board of state legislative, judicial and executive branch officials, is the council's largest program.

In 2018, Adkins launched the CSG Center of Innovation, which has been awarded over \$48,708,000 in foundation and government grants to provide outreach to the states on priority public policy issues.

Strategic Planning

CSG created a Leadership Council when revisions to the CSG Articles of Organization were adopted in 2012. The strategic planning function for CSG was assigned to the Leadership Council, and in December 2019 at the CSG National Conference in San Juan, Puerto Rico, 2020 CSG National Chair Wisconsin state Rep. Joan Ballweg announced her intention to guide the creation of the organization's next strategic plan.



PART IV
The Way Forward

Strategic Plan for The Council of State Governments

Mission CSG is a nonpartisan community of the states, committed to connecting, informing, inspiring and empowering public servants in all three branches of state government to put the best ideas and solutions into practice.

Vision CSG unites the states to advance the common good.

Values These are the 10 values that guide our work:

DEMOCRACY

We believe state government is a force for good. We are committed to preserving, protecting and defending the constitutions of the states and nation. We work to build a more perfect union. We believe that interbranch and intergovernmental cooperation, collaboration and communication enhance policy development and government performance. We believe the states play a vital role in our nation's dual sovereignty system of our democracy. We advocate for the interests of the states to all three branches of the federal government.

We grow civic literacy, access to democracy and citizen participation in government.

INTEGRITY

We act ethically in all that we say and do. We are trustworthy and transparent. We are good stewards of resources. We honor our commitments. We hold ourselves accountable.

FAIRNESS

We place equity at the center of our work. We are inclusive and welcoming. We value diversity because we know diversity makes our work better and our organization stronger. We value fairness in all that we do.

CIVILITY

We practice civility and engage in respectful discourse. We seek to understand and learn from those with whom we disagree. We are pragmatic consensus builders. We are tolerant of differences and mindful of all that we share in common with others.

EXCELLENCE

We aspire to achieve the highest levels of excellence in all that we do. We learn from failures and are committed to continuous improvement.

TRUTH

We value knowledge. We are honest. We believe facts matter and that a shared understanding of facts is essential when developing good public policy. We believe the proper use of data can help us understand and solve problems.

INNOVATION

We create new knowledge and identify promising approaches to solve problems. We use technology wisely. We engage in continuous learning. We evolve to meet emerging needs. We aren't afraid of change. We accept failure and disruption as a component of innovation. CSG will always be agile and adaptable, ready to respond to the priorities of state officials.

COLLABORATION

We work well with others. We share information and expertise freely. We forge productive partnerships to improve our impact. We initiate and facilitate productive interbranch and intergovernmental dialogue, collaboration and cooperation. We acknowledge the contributions of others in our work. We are grateful for our partners who help fund and support our work.

UNITY

We bring public servants together to learn from each other and to advance common goals. We are trusted convenors and skilled facilitators of diverse audiences. We value the history of CSG and its commitment to create harmony among the states. We build bridges and foster consensus. Together, we accomplish more.

IMPACT

We want to make a difference. We believe any state official can be more effective by being an active member of the CSG informed community of diverse peers. We build trust in state government when we help state officials solve problems to improve the lives of the people they serve.

Strategic Objectives

Part 1: Program Development

STRATEGIC OBJECTIVE 1

CSG will elevate its uniqueness of being the only three-branch organization that brings state officials together to learn from each other and to craft solutions to public policy challenges.

In assessing the strengths of CSG, it was noted by members and the leadership that one of the unique aspects of CSG is its commitment to a three-branch approach to its programming and membership. In looking at the membership numbers, this representation is not always in line with that ideal. This strategic objective seeks to improve that balance and develop ways to enhance three-branch participation. CSG is uniquely situated to provide actionable analytics that foster interstate cooperation.

Goals

1. Develop a plan to align organizational advocacy for the interests of the states in our federal government.
2. Increase the engagement of the leaders and influencers in the three branches of state government and encourage the involvement of members at all levels.
3. Facilitate opportunities for states to come together to craft multi-state solutions, including interstate compacts, allowing states to collectively advance shared priorities without federal involvement.

Action Steps

- Recruit staff to lead the federal affairs initiative.
- Reimagine ways for members to learn and share promising and proven solutions to public policy challenges.
- Provide data to improve the performance of all state governments.
- Educate members about the benefits of multi-state partnerships.
- Convene members to collaborate and create multi-state solutions.

STRATEGIC OBJECTIVE 2

CSG will expand its leadership development programs through the creation of a Leadership Development Center. In every focus group and in many of the strategic planning committee meetings, the CSG Henry Toll Fellowship and regional leadership programs were touted as premier activities of CSG. This strategic objective seeks to build on that program and expand its reach to multiple sectors of the membership based on tenure, experience and organizational expertise.

Goals

1. Grow and enhance state leaders by offering multiple levels of participation.
2. Achieve growth by providing state training, leadership development and creating a template for all state officials on civility and intentionality through interbranch education.
3. Create enhanced methods of coordination and collaboration between the CSG regional and national offices.
4. Create leadership training opportunities for all levels and branches of state government.

Action Steps

- Develop a leadership programming plan:
 - First-term orientation.
 - Legislator 101 Program.

- Leaders in the Legislature.
 - Legislative Staff.
 - Interbranch 101.
 - Continuum of leadership development across officials' careers.
 - Develop trainings for CSG members and staff on communications and negotiations to increase expertise.
 - Compare criteria on regional leadership requirements and the Henry Toll Fellowship.
- Share with leadership to identify priorities.

STRATEGIC OBJECTIVE 3

CSG will amplify, coordinate and align the policy work throughout the organization, including at the national headquarters office, the CSG Justice Center, CSG regional offices and affiliated organizations.

In numerous conversations with the Strategic Planning Committee, CSG membership as well as senior staff, regional directors and others, it was not always clear how the various levels of policy work related to one another, how information was shared and who was in charge of the output of policy recommendations. This strategic objective aims to clarify, strengthen and enhance the ability of CSG to make timely, precise and helpful recommendations to its constituency, membership and to represent the organization at all levels of government.

Goals

1. Analyze and align critical issues with member needs.
2. Incorporate information from the states and the federal level and its impact.
3. Make CSG the go-to organization to represent states at the federal level.
4. Develop the capacity to deliver trusted, timely actionable information on emerging, critical policy issues that affect the states.
5. Articulate the way the CSG Center of Innovation and the CSG Justice Center work together.
6. Biennially identify the public policy priorities of the states and align programs and services to respond to those priorities programs and services.
7. Engage partners to assist in delivering high-value programing on the issues identified.
8. Leverage the strengths of every CSG component to deliver programs and services in response to the priorities identified.
9. Accommodate three-branch perspectives and participation when determining priority issues.
10. Develop an intergovernmental affairs agenda to advance the interests of the states on the priority issues identified.

Action Steps

- Charge CSG staff to analyze how to meet the growing demands and increase capacity and speed of accurate responses.
- Develop authorization tree for the approval/action agenda for policy recommendations.
- Conduct conversations with states/advisory board/members to establish what they want more information on and what resources they need that CSG could provide.

STRATEGIC OBJECTIVE 4

CSG will grow opportunities for officials in all three branches of state government to collaborate, network and learn from each other.

One clear way to enhance three-branch participation in CSG is to provide additional opportunities for the membership to learn and collaborate going forward. This objective creates more opportunity to build the three-branch membership, create a stronger cadre of leaders with the vision of CSG in mind.

Goals

1. Evaluate the structure of the organization and determine how that structure can be changed, or to whose responsibility it should be, to enhance three-branch engagement in CSG governance, programs and services.
2. Expand opportunities for three-branch collaboration in the work of the CSG Justice Center.
3. Define how the annual CSG National Conference works with CSG regional offices and affiliated organizations and how the organization comes together.
4. Develop content targeted for specific audiences to significantly enhance awareness of and grow participation in CSG programs, initiatives and services.
5. Design forums to learn and share promising and evidence-based solutions to public policy challenges so that policymakers can utilize.
6. Build a broader cadre of participants to increase the sustainability of CSG.
7. Offer timely information to participants to develop more broad-based policy options.
8. Provide exclusive programming and content to state leaders.
9. Educate state leaders on the programs and services that can be delivered by CSG directly in state capitols.

Action Steps

- CSG will conduct a comprehensive analysis of the CSG National Conference, including the areas of:
 - budget
 - marketing
 - sponsorships
 - agenda content
 - attendance
 - staffing
 - date
 - length of convening
- Define what that time together looks like (celebration/recognitions/networking vs. breakout/work sessions).
- Create opportunities for increased collaboration to make the best of time, ideas and resources.
- Create a gap analysis on state engagement.

Part 2: Management / Structure / Governance

STRATEGIC OBJECTIVE 1

Develop a common set of criteria that can be applied across the regions to select leaders to serve in CSG national leadership roles.

In looking at the process for selecting national leaders, it was not always clear what factors came into play in the selection/election of national leaders. At the strategic planning meeting in Madison, it was suggested by members that a review of criteria be part of the plan and that the ability and willingness to access resources should be a part of the criteria for national leadership. A further investigation of the criteria is warranted as CSG faces financial hurdles going forward.

Goals

1. Align the selection of national and regional leaders.
2. Invite regional offices to review criteria for national leadership.
3. Review and update national leadership job descriptions and selection process.
4. Analyze the ability and willingness of leadership to secure resources and/or advance the organization through time and talent.
5. Encourage new leadership to increase the base of support.
6. Be intentional about diversity and representation when selecting leaders and national officers.
7. Identify core competencies for each officer's role.

Action Steps

- Review the national officer selection process to determine how to enhance diversity, ensure political balance, and advance the financial success of the annual national conference and other organizational initiatives.
- Define and develop specific job descriptions for all positions leading up to national leadership.
 - Outline time commitments.
 - Coordinate between national and regions on leadership role selection.
 - Analyze timelines for chair rotations for a unified selection process.

STRATEGIC OBJECTIVE 2

Evaluate the current national and regional governing structure for effective long-term viability of CSG to enhance organizational performance.

During the course of the strategic planning process, it has become evident that there needs to be greater clarity and cooperation in how CSG is governed from a national perspective. Leadership must determine the best and most economical way to advance CSG to achieve its vision. The CSG national office is committed to the whole and to sharing staff and resources across the field. Now is the time to begin the process of evaluating the best organizational model for the future.

Goals

1. Increase resiliency and sustainability through an organizational risk assessment.
2. Understand areas for improvement and implement changes for a more coherent governing structure to achieve the vision of a united CSG.
3. Make changes as needed to ensure diversity and equitable access.
4. Generate greater collaboration and cooperation among CSG national, regions and the CSG Justice Center.
5. Study the national standing policy committee structure to determine how best to align it with CSG public policy priorities, understanding that standing committees allow a constant forum and means for sharing among members during convenings.

6. Implement a system that reviews the affiliated organizations' values and benefits to the larger organization.
 - a. Define process and criteria for evaluating new affiliated organization requests.
 - b. Evaluate the current affiliated organizations for value and benefit.
 - c. Determine long-term strategy of affiliated organization structure.
 - d. Complete a strategic cost analysis of all affiliated organizations.
 - e. Develop a new affiliated organization agreement where appropriate.
 - f. Make decisions on current affiliated organizations.
 - g. Consider tiers of affiliation:
 - i. Management.
 - ii. Partnership in the work.

Action Steps

- Formalize communications with regional directors/senior leadership.
- Clarify current work and responsibilities.
- Involve regional and national leadership to discuss future alignment of regional and national offices.
- Build on current training in diversity, equity and inclusion.
- Assess and align the demographics within CSG leadership structure.

STRATEGIC OBJECTIVE 3

Embed the mindset of “One Team,” a unified workplace culture that reflects the CSG values into operations to support the execution of the strategic plan, while recognizing the varied organizational settings, focus and priorities.

In looking at the organizational structure and culture of CSG one can see the possibility of building a unified team that manifests the newly stated vision of CSG. United to advance the common good has resonance with the staffing model as well as the national vision. Utilizing the work done in developing a “One Team” mindset throughout the organization can only benefit the whole.

Goals

1. Bring together senior leadership across the organization to foster alignment.
2. Partner effectively to speed up decision making and execution.
3. Learn together and transfer learning within CSG.
4. Build on the “One Team” concept to enhance the culture and talent of the organization.

Action Steps

- Develop agreement on how the team will work together.
- Define CSG culture, purpose and values — how we want to be remembered.
- Define culture statement — the culture needed for success and to make CSG a great place to work.
- Understand actions from CSG senior management, as reflected in the organizational structure, that translate the culture for everyone to understand.
- Define leadership competencies and behavior expectations.
- Define culture of accountability through metrics.

STRATEGIC OBJECTIVE 4

CSG will build a fiscally sustainable business model to support “One Team.”

At the convening of the regional directors, senior management and affiliated organizations in June 2021, there was discussion about the way in which the regional and national offices work together towards their common purpose, organizational objectives, communication and program development. A commitment was made to explore this complex organizational model and to build a clearer path for moving forward in the process of developing the Strategic Plan. The successful implementation of this objective will make clear who, when, where and how operational decisions are made and how CSG can become more efficient and streamlined.

Goals

1. Conduct a comprehensive, enterprise-wide risk assessment and, consistent with best practices, address any vulnerabilities identified.
2. Develop a single, enterprise-wide business model, budget process and financial procedures to ensure the efficient administration of the organization and to advance the fiscal viability, sustainability, accountability and resiliency of the organization.
3. Identify vulnerabilities and specific steps necessary to address them.
4. Develop a collaborative, enterprise-wide process to annually develop a unified budget for CSG to ensure accountability across the organization.
5. Enhance transparency and assure integrity in all financial matters.
6. Plan for a broad range of potential financial scenarios to better prepare for all financial contingencies.
7. Strictly enforce processes and procedures to enhance financial performance and compliance.

Action Steps

- Develop approval process for grant applications.
- Develop protocol for institutional obligation.
- Increase efficiencies across the organization.
- Create timeline to implement changes.

Part 3: Resource Development

STRATEGIC OBJECTIVE 1

CSG will create and implement a comprehensive, enterprise-wide resource development plan.

The development of a comprehensive plan will codify and categorize the multiple opportunities to increase income and sources of funding for CSG, nationally and regionally. When shared, this information will allow much more to be done and more resources to be raised for the operation of CSG nationally and regionally and build a stronger base of support going forward.

Goals

1. Achieve financial stability to support long-term growth.
2. Ensure ability to capitalize on emerging opportunities.
3. Develop a common language and standardize fundraising methodology.
4. Develop organizational fundraising goals with commitments and tracking.
5. Grow existing relationships.
6. Coordinate donor benefits.
7. Act in accord with CSG values.
8. Eliminate internal competition.
9. Better share information, donors and prospects.

Action Steps

- Clarify staff responsibilities in every business unit to improve overall fundraising coordination.
- Develop a decision tree.
- Conduct a study of the CSG Associates Program including cost of membership, benefits conferred, benefits used and allocation of revenue to determine how best to design a private sector support community to enhance private sector revenue that supports the entire organization.
 - Review sponsorship program to ensure alignment of all business units.
- Conduct a study and develop a plan to grow general fund support for CSG from charitable foundations and nonprofit partners.
- Implement enterprise-wide database to more effectively manage fundraising relationships across the organization.
- Analyze financial implications of duplicative funding asks and responses.
- Coordinate with membership on overall dues strategy.
- Coordinate with finance on how states and individuals support attendance at CSG events.

STRATEGIC OBJECTIVE 2

CSG will ensure all member states are financially committed with CSG.

The issue of nonparticipation of certain states was a recurring theme in the interviews, focus groups and the strategic planning team. A close and in-depth look needs to be taken and a course of action taken to make decisions about this issue. When controversy exists around individual participation in states where dues are not paid, conversations need to be held in a supportive manner as to how to address these issues.

Goals

1. Achieve 100% state dues participation by all states.
2. Increase participation and retention of member states.
3. Clarify participation of individual members in non-dues-paying states.
4. Develop policy on travel to non-dues-paying states for meetings and convenings.
5. Develop scaled charges for services of CSG or the CSG Justice Center in dues-paying and non-paying states.

Action Steps

(To be coordinated and supported by the respective regions.)

- Develop state customized plans.
- Develop a state liaison plan (also applies to external/branding):
 - Define responsibilities.
 - Develop one-pager/other marketing materials demonstrating CSG value for state visits.
 - Review best practices in the regions.
 - Recruit bipartisan teams from each state.
 - Seek approval from leaders in the legislature on who serves as a liaison.
- Develop policy on travel to non-dues-paying states for meetings and convenings.
- Develop scaled charges for services of CSG in dues paying and non-dues-paying states.

STRATEGIC OBJECTIVE 3

CSG will attract new external resources to support program work.

There are certain policy issues that can attract specific funding for particular work. This objective offers the opportunity to attract new resources and to build relationships with new funders so that the base of support for CSG grows over time.

Goals

1. Attract new funders.
2. Increase resources for policy program areas.
3. Develop a process for joint proposals between national and regional offices.

Action Steps

- Establish a baseline to understand funding sources.
- Create a focus group with internal public policy experts.
- Establish reasonable and achievable actions within a one-year timeframe.
- Choose initiatives that will provide the best organizational benefit.
- Communicate state ROI in investing in CSG to demonstrate the true value.

Part 4: External Environment

STRATEGIC OBJECTIVE 1

CSG will develop and implement a comprehensive, enterprise-wide, integrated strategic communications plan involving all components of the organization: the CSG national headquarters office, the CSG Justice Center, CSG regional offices and affiliated organizations.

CSG does not have the widespread profile that could be possible for an organization with its depth of expertise, savvy and reach that it should have. An organization-wide plan can correct that and advance the public image, create new memberships and align its supporters with its national agenda.

Goals

1. Ensure unified CSG branding and visual identity across the enterprise.
2. Train all staff on the “voice” of CSG, elevator speech and all component parts of CSG.
3. Grow awareness of CSG among core constituencies.
4. Sharpen messaging on all platforms to better communicate with state officials and the public they serve.
5. Create a shared understanding of how CSG is perceived externally.

Action Steps

- Create a sustainable marketing plan.
- Implement a unified membership management system.
- Rebrand the CSG Center of Innovation to increase understanding of policy initiatives.
- Develop metrics to measure success and effectiveness.
- Update website with more complete information.

STRATEGIC OBJECTIVE 2

Ensure member outreach to all three branches of government.

If CSG is successful in creating opportunities for program development in all three branches, CSG can then brand and communicate these success stories to create broader, deeper and more resonant stories to advance the common good.

Goals

1. Understand who is responsible for the multi-branch approach.
2. Create uniformity in the multi-branch approach in the states.
3. Review committee structures.

Action Steps

- Identify a multi-branch team to explore the audience.
- Clarify team roles and responsibilities.
- Connect with new constituencies.

STRATEGIC OBJECTIVE 3

Elevate CSG profile inclusive of all components.

One of the greatest assets of CSG is its leadership, including its national leadership and senior staff. This objective creates an opportunity to take advantage of these assets by specifically designing public campaigns that take advantage of the strengths of the personnel and the audiences immediately available to them.

Goals

1. Develop a communications plan for senior staff and senior leadership.
2. Identify senior staff and their area of concentration/responsibility on public media, including the organization's website.
3. Capture and utilize information from external visitations.
4. Create calendar for regular press releases, visitations and outreach.

Action Steps

- Develop process for incorporating feedback.
- Incorporate learned information into the communications strategy.

STRATEGIC OBJECTIVE 4

CSG will develop enhanced rapid response capabilities to provide timely assessment of current and emerging public policy issues and their impact on the states.

A key asset of CSG is its ability to create rapid response. The challenge is to move the information through a densely populated organization without a clear line of authority as to what can be said and when. This objective would seek to clarify and enhance the process of a rapid response mechanism.

Goals

1. Recognize that timeliness directly impacts the value and relevancy of information.
2. Expand capacity to respond to breaking news and major events that affect the states with accurate and insightful information.

Action Steps

- Identify team members and responsibilities.
- Integrate communication team members across the organization to create efficiencies.
- Create master calendar.

CONCLUSION

The successful accomplishment of the strategic objectives outlined above will ensure the strong viable CSG that is envisioned at the outset and creation of the plan.

CSG National Headquarters

1776 Avenue of the States / Lexington, KY 40511 / csg.org

CSG East

22 Cortlandt Street, 22nd Floor / New York, NY 10007 / csg-erc.org

CSG Midwest

701 E. 22nd Street, Suite 110 / Lombard, IL 60148 / csgmidwest.org

CSG South

P.O. Box 98129 / Atlanta, GA 30359 / csgsouth.org

CSG West

1107 9th Street, Suite 730 / Sacramento, CA 95814 / csgwest.org



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