

# NOT FOR RELEASE

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**APPROVED**

BOARD OF DIRECTORS

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TO: Board of Directors

FROM: Program Planning Task Force, Allen J. Saeks, Chairman

## Introduction

The Twin Cities area is coming into a period of major uncertainty, and change, both with respect to the nature of its community and public problems, and with respect to the ways in which these should be addressed. The Citizens League should move during 1978-79 to prepare itself to provide major policy leadership, in the decade of the 1980s.

This is the central conclusion of this task force, from the examination we have made of the questions the Board of Directors has put to us.

It represents, in an important sense, a confirmation of the traditional mission of the Citizens League . . . which we see as, still, to help this community understand its problems and what ought to be done about them. The Citizens League has continued to perform this function well, on specific subject areas. But, increasingly -- for us, as well as for the community in general -- there has been a growing unclarity and uncertainty about some of the basic assumptions. What is "a public problem"? What are the effective and appropriate devices for state or community action?

Our answers to the other questions put to the task force by the Board . . . having to do with the nature of the Citizens League study process, with the implementation of reports and proposals, and with the financing of the organization . . . then fall into place around and supportive of the central concept of its mission.

## Recommendations

We have concluded as follows:

1. The Citizens League should commission a special study beginning in the fall of 1978 to provide a foundation for its own, and the community's, agenda during the coming decade.

We have the sense that public affairs -- really at all levels -- has been through a period stretching back now about 40 years that has been characterized by a dramatic expansion of governmental responsibility for problems; by the addition of new public programs; by dramatic reorganization of government agencies at all levels; by the opening-up of policy-making processes; finally, by dramatic expansion of public finance.

Our task force had the sense that -- again at all levels -- public affairs is now coming into a period of major appraisal of these changes and trends. In this, the central question seems to be "What have been its effects?" Partly, this is asking "What works?" Partly, too, it's asking "What have been the side effects of what we have done?"

In part, also, the period into which we are now moving seems to be characterized by a growing citizen and public discontent with institutions of all kinds -- non-governmental as well as governmental. We can see this through the responses coming back from the public in surveys, about their attitudes toward all the major institutions of community life: medicine, law, the courts, the legislature, the press, business, labor, etc.

Unfortunately, there is coming into the public discussion at the same time a basic uncertainty about the most appropriate and most effective ways to have decisions made, and carried out. It is not clear if things will be better if done at the national level, or at the local level. It is not clear whether, in general, we should encourage the trend toward centralization, or the trend toward decentralization. It is not clear whether the trend toward policy-making by the courts is a good thing, or a bad thing. It is not clear where interventions of government into private systems make those systems work better or worse. It is not clear whether governmental regulation is in the interest of the public or in the interest of the regulated. It is not clear whether increased appropriations are essential for new and innovative programs -- or an enemy of innovation.

It is not only that we seem to be losing confidence about how to do what we know we need to do: It is also that we seem to be increasingly in doubt about what is, in fact, the right thing to do. It is in this sense . . . as well as in the concerns about the effects of governmental programs and regulations . . . that the issues arising today are essentially substantive rather than procedural.

#### The charge for the study

The first and most fundamental effort will be to get the Citizens League in touch with the research, thinking, writing, and discussion about the future issues and processes of public life -- wherever these activities are going on. The Citizens League should then, in its own study, try to think through the issues and the possible responses in the context of Minnesota and the Twin Cities metropolitan area. The aim should be to clarify and, if necessary, to reform the intellectual and philosophical framework through which the State and community will be analyzing their problems and what ought to be done about them, over the next ten years.

The committee should:

- a. Identify the major trends that are moving in our society, and our economy, and our political life. There should also be an effort to identify those factors which we presently believe not to be changing, and which we most tend to take for granted . . . and to examine the possibility of a major "surprise."
- b. Identify the major shape of the problems and opportunities that will be presented for community action during the decade.
- c. Examine the present methods of collective public action, and the concerns about them. This would include issues of scale -- national vs. local. It would include questions about the mode of public action -- legislative, executive/administrative or judicial. It would look at the major forms of action -- public ownership, public regulation, subsidy, subsidy to users vs. subsidy to producers, "competitive" market-type solutions, planning, and goal setting, etc.

- d. Examine the present role of non-governmental institutions for collective action, and some of the issues respecting their role. This would include the institutions of the private sector, and those in the non-profits or "third sector."

#### Procedures for the study

This special study should be organized and conducted with somewhat different procedures from the normal Citizens League study. In some respects it should follow the model used in 1966-67 for the major study of metropolitan governmental organizations. Specifically, the study should:

- a. Be handled through a committee whose members are appointed by the Citizens League Board of Directors. The study committee should consist of about 40 persons. Some should be from the community outside the Citizens League. Some should be members who have had experience with one or more of the Citizens League studies of major service problems in recent years. The President should be responsible for bringing to the Board a proposed list of committee members, working with the counsel of such persons as he may find helpful. Board members should be encouraged to offer, and be responsible for offering, suggestions for possible members.
- b. Be equipped with more than the normal amount of resources for study and investigation. Much of the resource material for this study will have to be gathered from persons and publications outside the Twin Cities area. Some may be visited, where they work. Some should be brought in here -- in person or by telephone -- to visit with the committee. There should also be an intensive review of Citizens League study reports in recent years: These in many respects, will form the background for this new study . . . in much the same way that the studies of particular metropolitan service problems, 1969-66, formed the background of the work of the special study under the committee chaired by Charles Clay.
- c. Run on a schedule that would involve beginning in October 1978 and concluding by July 1, 1979.

#### Financing of the study

This study should have some different characteristics from the normal Citizens League study. Specifically, it should:

- a. Have a budget somewhat higher than the normal, to finance the special resources mentioned above.
  - b. Have some special "targeted" funding from an outside source. A grant, or grants, should be sought from one or more local foundations toward the cost of the study.
2. The Citizens League should increase significantly its efforts to follow up its reports and to pursue implementation of its recommendations.

In the last five or six years, we have opened up a number of major new policy areas. We have taken on some very large and complex policy problems. Our study committees and the Board have made some ambitious recommendations. Not all of them are as focused on governmental policy action as reports and recommendations in earlier years. For all these reasons, implementation is difficult and often slow and evolutionary.

Your task force believes that the organization needs to have better balancing, annually, of the effort "budgeted" to follow up and pursue reports and proposals as against efforts to open up new reports and proposals in still other policy and problem areas. This involves the allocation both of staff and volunteer time.

With such a substantial stock of recommendations and proposals, so to speak, "in inventory," we have concluded that beginning in 1978 there should be a significant increase in the efforts under the general heading of "community information."

#### Increased activity by the task forces

Everything we have seen reinforces the conclusion arrived at by the last Program Planning Task Force . . . that the range of issues in which the Citizens League is active is now so broad that it cannot conceivably be followed adequately by the Community Information Committee operating as a single entity on its traditional meeting schedule. The diversification of the community information effort, through task forces working in the major program areas, is therefore a good one, to be continued.

These are appropriate also because, typically, the situation surrounding a report and proposals begins to change not long after the report is issued. There is a need to update our understanding of the context of community action. Small investigations conducted by the task forces are very effective for this purpose -- as are the written "statements" that emerge from them.

The task forces should be continued in the areas of tax and finance, governmental structure, transportation, and housing, even though one or more might not be activated for some months at a time. These should not, however, be considered as permanent: they should be re-established annually by the Board of Directors at the beginning of its new year. Similarly, task forces may be established on the same basis in other program areas.

We should continue the practice of appointing members to the task forces from the Board and the Community Information Committee, and from the community -- in order to draw in persons necessarily involved in the action required to implement the League's recommendations.

#### Communication to, and contact with, the community

We emphasize the importance for the success of the League in being successful with the proposals being made by our study committees. At the same time, the League cannot -- practically or legally -- become a lobbying organization competing with the type of advocacy organization now active on either the national or state scene. Essentially, the job of the Citizens League remains to generate innovative and constructive and realistic proposals, and to persuade others -- in their own interest, and in the interest of the community -- to pick up these ideas and put them into action.

We must therefore make special efforts to communicate to others the understanding of problems, and their solution, that develops within the Citizens League study process.

The Community Information Committee should, in the fall of 1978, organize a program of personal contacts to broaden and strengthen the relationships between

the Citizens League and organizations and individuals active in public affairs in the Twin Cities area, governmental and non-governmental. In some cases this will involve persons from the community coming in to speak to the Community Information Committee and its task forces. In some cases it will mean staff members or volunteers from the League going out for conversations in the community.

The Community Information Committee should, during the coming year, continue to expand the practice of supplying information about public affairs to the public information media -- the press, radio and television, and specialized publications.

#### The use of members of the study committees

The responsibility for the presentation of the Citizens League's position (which is the Board's position) should continue to be a responsibility of the Board and its Community Information Committee. There should, however, be better reporting to the Board, and where possible to the members of the study committee, on the progress of implementation and the nature of community reaction. The early presentation of the report should be the responsibility of the study committee chairman, assisted by the staff. Routinely, a meeting should be scheduled at an early date, at which the study committee chairman can sit down with the Community Information Committee to report on the early reaction to the League's report and proposals, and receive guidance. The reporting on the progress of implementation should continue to occur through the monthly "update" reports to the Board, and through items in the Citizens League NEWS. Where feasible, a special memo should be sent to the members of the study committee. In general, too, the study committee members should be made aware, before their work is completed, of the procedures the Citizens League will use in following up and acting on their report.

Board members should also be made more aware, generally, of the Community Information Committee and its operations. A staff memo prepared for the task force laid this out in some detail. It is attached as an appendix to this report, and should be distributed to new members of the Board annually.

3. The Citizens League should, for the time being, continue -- with some modification -- the present policy of exploring new issue areas through committees formed by the process of open sign-up.

While increased attention would, under our recommendations, be devoted to keeping up with issue areas in which the League has conducted studies and made recommendations, a major part of the organization's activity would also continue to be in areas not studied previously (or for some considerable period of time).

Since the early 1960s these studies have been done by committees formed just for that particular purpose out of the membership by open sign-up. This -- as your task force was aware -- is not a typical pattern for organizations involved in public affairs. It has served the League well for a considerable period of time. Beginning in the early 1970s the planning task forces and the Operations and Program Committees in the League have been concerned about some aspects of its operation.

Your task force believes the Citizens League should be prepared to consider a shift toward a system in which the members of study committees are named by the Board of the League, on application from members. We do not, however, conclude that the time has come in 1978 to install this system generally for League studies.

For the time being, the Citizens League should continue the efforts that have been introduced in recent years to make adjustments in the study process that would balance or offset some of the changes in the composition and activity of study committees that are causing concern.

During the work of this task force, and at the time of the mail ballot election, a survey was made of members' attitude toward their participation in study committees. One overwhelming conclusion was that our present study process is excessively long and burdensome on members who participate. Ways must be found to shorten and simplify the process. The task force believes that a major step in this direction can be achieved by thinking through the background of the study somewhat more carefully before launching the study committee on its assignment. Hence, the proposals for Board involvement prior to the formation of the study committee.

As the Board will recall, our task force concluded that there should be -- under Board direction -- some new procedures for the development of the charge to the study committee; and some greater involvement of Board members in the recruitment of generalists for study committee membership. Our recommendations on these points were submitted to the Board early, at its meeting June 28. As of mid-July, they have been approved and are in process of implementation.

Your task force believes, also, that the recruitment of generalist members could be assisted if the organization could do a somewhat better job of "scouting" for persons -- both within and presently outside the Citizens League membership -- who might be willing, able and interested to make a major contribution to League study projects. The staff should develop this "recruitment" function.

4. The Citizens League should make a major effort to upgrade its system of finance, and begin to seek limited financing for its study program from private philanthropic sources.

Your task force sees the present program of the Citizens League essentially continuing . . . neither changing greatly, nor expanding. We considered, but rejected, the suggestion sometimes made that the Citizens League should "go statewide." We believe that about six major reports and ideas is enough: about as much, in other words, as the community can absorb in a year.

Nevertheless, even without major expansions of program, the budget will rise. Typically, the inflationary increase which appears in our budget will also have a growth due to the continuing maturity of the staff. Reasonable projections indicate this will take us to a level of about \$400,000 per year by 1983.

Over this five-year period, the League should make major efforts to expand financing from philanthropy, both individual and organized.

Traditionally, all financial support for the League has come in the form of memberships and contributions to the organization, rather than to and for the purpose of any particular one of our annual policy studies. This policy was followed and maintained in a period during which the great bulk of the organization's revenues came from commercial business firms. As the League moves increasingly for revenues toward charitable foundations, it should be possible to permit, in certain appropriate cases, the solicitation of grants specifically for the conduct of certain studies. We recommend the Operations Committee, in its supervision of the League's financing, follow this policy subject to four conditions: (a) That the source is appropriate, presenting no real conflicts of

interest, or appearances of conflict that would be detrimental to the credibility of the League in conducting the study; (b) That it would be done as a supplemental effort, if needed, to the organization's fundamental effort to open up larger support from philanthropy in the form of substantial grants for the basic operating program on a non-recurring basis; (c) That there be an upper limit (perhaps one-third of the total budget for studies) for contributions from such sources, this limit to be set by the Operations Committee; (d) That all applications for financial support for particular studies be prepared by the Operations Committee and sent to the Board for approval, with both the subject of the study and the potential donor specified.

The Operations Committee and the League staff should implement, beginning in the coming year, a project for bequests and memorials. We should not, nowever, make a major effort at, or pin major hopes on, the building of a large endowment.

Your task force has also concluded that the Citizens League cannot achieve its goals without a greater understanding throughout the giving community of the needs of this organization and its programs . . . and an understanding as well of the contribution the Citizens League makes back to the community through its analysis and proposals. The Operations Committee and staff should therefore develop during 1978-79 a program that would have the object of educating both present and potential contributors to the League, and -- more generally -- persons in civic leadership positions active in the public life of the community, about the Citizens League and its activities.