From 2000 to 2010, when the U.S. lost 2 million jobs, roughly half of those jobs were from Michigan. Today, the state is back on track with more than 250,000 new jobs created.

Michigan companies pay on average 3% more in “total business costs”.

Michigan has 2,875 units of local government which is the 12th most in the nation.
Innovation
Michigan is a strong innovator with a ranking of 10th in the nation for university R&D spending.

in 10 jobs will require education beyond high school by 2025

Michigan’s metros account for 87% of the state’s exports

Only 21% of Michigan’s high school graduates are college or career ready

38% of all major roads in Michigan are rated poor or mediocre quality
About Business Leaders for Michigan

Business Leaders for Michigan is a private, non-profit executive leadership organization whose mission is to develop, advocate and support high-impact strategies that will make Michigan a Top Ten state for jobs, personal income and a healthy economy. The organization’s work is defined by the Michigan Turnaround Plan, a holistic, fact-based strategy developed to achieve our Top Ten goal. Serving as the state’s business roundtable, Business Leaders for Michigan is composed of the chairpersons, chief executive officers, or most senior executives of Michigan’s largest companies and universities. Our members drive over 25% of the state’s economy, provide over 325,000 direct and 820,000 indirect jobs in Michigan, generate over $1 trillion in annual revenue and serve nearly one half of all Michigan public university students.
Michigan is turning around.

Michiganders want progress, and we have all worked hard to create new jobs and compete in a world that’s very different than it was just a few years ago. As a result, our economy is growing faster than it has in over a decade.

At Business Leaders for Michigan (BLM), we are committed to helping accelerate our state’s transformation. This updated edition of the Michigan Turnaround Plan (MTP), originally introduced in 2009, continues to have a goal of making Michigan a Top Ten state for jobs, personal income and a healthy economy. But it’s been modified to reflect the gains we’ve made as a state, as well as new challenges on the horizon.

Thanks to state policy makers, business and community groups, and citizens and stakeholders who have rallied around the Michigan Turnaround Plan, the state has advanced in meaningful ways. Michigan’s growth now outpaces that of many other states, but we can’t declare victory yet. We are still making up for ground we lost during the Great Recession, and our competitors in other states and regions of the world aren’t standing still.

We need to keep up our momentum and work from a shared playbook that helps us move forward together to grow a stronger Michigan. We believe the Michigan Turnaround Plan provides the ideas and strategies we need to help build what’s next for the Great Lakes State.

Now, more than ever, it’s time for teamwork and resolve.

Michigan’s future is waiting. Are you in?

Sincerely,

Jeff M. Fettig
Chair, BLM Board of Directors
Chairman & CEO
Whirlpool Corporation

Doug Rothwell
President & CEO
Business Leaders for Michigan
“We’re serious about creating more good jobs, higher income, and a healthy economy. We’ve got a pro-business climate, a great location and a talented workforce.”

Sounds great, right? Unfortunately, the above statement is made by virtually every state in our nation, not just Michigan. Everyone is competing to create, attract or retain more good jobs. The only way to win is to be faster, better, and more productive than the competition.

Here in Michigan, we’ve made progress during the last several years rebuilding our position in the worldwide jobs race.
OUR PAST
Prosperous State - Per capita personal income was 14% above the national average in the 1950s.

RECENT DECADES
Relative Decline - Michigan’s economic troubles began in the 1960s and accelerated rapidly in the decades that followed as global competition increased. As a result, Michigan became poorer, smaller and less competitive relative to other states.

NEW GAINS
Reversing Course - Michigan is currently experiencing one of the nation’s strongest recoveries. About one-third of the Michigan Turnaround Plan (MTP) has been implemented with good results. State government finances are more stable. The tax system is fairer. Long-term debt has been reduced. Unnecessary regulations have been eliminated. In short, our business climate is more competitive.

TODAY
Turnaround Underway - Michigan continues to recover faster than most states, but has more ground to make up. Our employment, GDP, and personal income have grown faster than most peers since 2009, but employment GDP and income levels are still below where they were before the Great Recession.

FUTURE
Michigan Turnaround Plan - A holistic plan building on Michigan’s strengths to make Michigan a Top Ten state for jobs, personal income and a healthy economy. The MTP offers strategies to help us compete, invest and grow.
A half-century ago, the U.S. led the world in creating good jobs and a healthy economy, and Michigan was a leader among the states. Michigan enjoyed a reputation as the world’s automotive center, the Arsenal of Democracy and the birthplace of assembly line manufacturing technologies. In 1953 Michigan was in the Top Ten for per capita personal income, with per capita GDP levels that would grow to the nation’s 5th highest over the next decade.

But in the decades that followed, both the U.S. and Michigan had begun to experience the full impact of global competition.
Flash forward to 2009.

The American economy was in the midst of the Great Recession, and Michigan was suffering more than any other state. A poor tax and regulatory environment, regional and political divisions, and mixed priorities contributed to Michigan becoming less and less competitive relative to its peers across the U.S.

- Michigan lost roughly half of the 2 million jobs lost in the nation from 2000 through 2010.
- Personal income in Michigan fell by nearly 14% during the same decade.
- Between 2000 and 2010, Michigan was the only state to lose population.

Michigan had to get competitive again, and fast.

In 2009, Business Leaders for Michigan (BLM) released the Michigan Turnaround Plan (MTP). The MTP is a comprehensive, fact-based plan that lays out a series of achievable, measurable goals that everyone in the state can get behind to help turn the state around. The state’s progress on the MTP is benchmarked annually by BLM and updated as necessary to ensure Michigan stays on track.

Five years later – and thanks to the shared efforts of state, local, community and business leaders in every corner of the state – one-third of the MTP has been implemented. State finances are managed better. Long-term debt has been reduced. Regional divisions are fading and cooperation is rising. The result is more than 250,000 Michigan jobs have been created. Income and GDP levels are on the rise. The conditions are right to foster growth – but now we need to go further.

The 2014 MTP is designed to lay out what’s next for Michigan. It identifies areas where we can compete, invest and grow in order to make our state stronger for generations to come.
Michigan’s Competitive Position

Michigan continues to recover faster than most states, but we have more ground to make up. Our employment, GDP and personal income have grown faster than most peers since 2009, but per capita GDP, income levels and employment are still below where they were before the Great Recession.

Here’s a look at our competitive position, and what we can do to make Michigan stronger.
GROWTH OCCURS WHERE THERE IS HIGH VALUE, FAIR COST

Economic growth occurs in places that offer the most benefit relative to costs. The Michigan Turnaround Plan is based on this understanding, and our state is making real progress toward becoming a high value place to create jobs.

MICHIGAN’S COMPETITIVE POSITION TODAY

Our state’s positives are getting more attention now that we’ve fixed some competitive weaknesses; however, we still have a long way to go to becoming a Top Ten state.

A STATE ON THE RISE

One-third of the way through implementation of the Michigan Turnaround Plan, we see real progress.

The chart at right shows where we were during the worst of the Great Recession, where we are in 2012, and our goal of becoming a Top Ten state. We’re rising in the rankings, but still have more to do.

BUSINESS TAXES ARE IMPROVING

Michigan’s corporate tax climate has improved to 9th best in the nation from 2nd worst and our overall tax environment has risen to 14th best in the nation.

While our tax system has seem dramatic improvements, nationally we still rank poorly for the cost of doing business and business incentives in Michigan may be less competitive compared to other states.

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<tr>
<th>Corporate Tax Climate</th>
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<tr>
<td>Michigan</td>
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<td>2011 2nd WORST</td>
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<td>2014 9th BEST</td>
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RANKS HIGH IN INNOVATION BUT LOW IN ENTREPRENEURISM

Michigan is a Top Ten state for R&D and patent activity, and has a growing supply of venture capital.

Our university R&D is among the Top Ten in the nation, and Michigan ranks 13th in the number of patents awarded. Our state’s entrepreneurs are supported by a 60% increase in venture capital investment, which is now 19th highest in the nation.

PERCEPTIONS ARE IMPROVING

National business leader perceptions of Michigan’s business climate are improving.

*Site Selection* magazine has named Michigan the 8th most competitive state for achieving success in job creation and economic development, up from 16th in 2011.
GEOGRAPHIC LOCATION

Our state’s unique geographic advantages can be leveraged to increase exports and attract foreign direct investment.

Michigan is one of the largest U.S. air hubs to Asia, a center link of the NAFTA highway and the closest entry to the Midwest from the Halifax port. The state can capitalize on the growth of just-in-time delivery and congestion of other midwest ports.

INFRASTRUCTURE NEEDS WORK

Michigan’s aging infrastructure impedes our global competitiveness.

All forms of our physical infrastructure, including roads and bridges, need investment to ensure Michigan’s people and products can access global markets.

LESS EDUCATED WORKFORCE

Michigan’s talent production is good, but college attainment is low.

While Michigan confers a large number of degrees and awards more “critical skills” degrees than most of our peers, the percentage of Michigan’s population with an associate’s degree or above is lower than Top Ten states. What’s more, degreed individuals aren’t moving to Michigan, leaving us with an overall talent deficit.
Today, our state is more competitive. In a fast-paced global economy, it’s not enough just to compete. Michigan needs to win.

Our work needs to be about both controlling costs and adding more, positive benefits. Michigan must become a more responsive place with better talent and stronger assets. We must be a more connected and welcoming place than our competitors. We must leverage assets we already have to drive growth and be recognized as a center of innovation.
michigan turnaround plan

COMPETE
- Create an economic environment that is better than competitor states
- Strengthen Michigan’s fiscal stability and reduce future financial uncertainty
- Create a regulatory environment that’s more responsive than competitor states
- Provide stronger economic development services than competitor states
- Provide better local government services than competitor states
- Support federal policy changes that enhance Michigan’s competitiveness

INVEST
- Connect Michigan to the world through strong infrastructure
- Ensure every Michigan child is ready to learn and advance
- Increase the number of workers with education and training beyond high school
- Achieve Top Ten community college and university affordability by increasing performance-based funding
- Improve the connection between education and careers

GROW
- Grow a New Michigan economy by leveraging assets with the greatest potential to meet future global economic needs
- Grow Detroit into a thriving central city by attracting new investment, improving city services and repopulating neighborhoods
- Make Michigan an aspirational destination by being a welcoming place to all
- Reclaim Michigan’s reputation as a center for innovation by advancing a holistic strategy
COMPETE

Goal
Michigan is more attractive than competitor states as a place for job providers to start or grow a business

Why it’s important
Because there are a virtually unlimited number of places where business can locate in a global economy, Michigan has to at least be average or better on most business climate factors compared to competitor locations

Indicator of success
Top Ten state as a place to do business
Create an economic environment that is better than competitor states

- Annually benchmark Michigan's economic competitiveness to Top Ten states
- Continue to modernize Michigan's tax system to reward production and reflect changes in the composition of the economy
  - Phase out the personal property tax without negatively impacting communities
- Maintain competitive energy costs

Strengthen Michigan's fiscal stability and reduce future financial uncertainty

- Adopt a 10 year state strategic plan
- Require annual performance-based budgeting
- Reduce corrections costs to the Great Lakes average
- Continue paying down state unfunded liabilities
- Grow the Budget Stabilization Fund to 5% of annual operating revenues
- Adopt fiscal notes for all legislation

Create a regulatory environment that's more responsive than competitor states

- Issue permits in Top Ten timeframes
- Change the regulatory culture to be customer-centric

Provide stronger economic development services than competitor states

- Deliver Top Ten economic development customer service
- Offer competitive economic development incentives
- Act cohesively to attract and grow more good jobs

Provide better local government services than competitor states

- Benchmark and encourage local governments to adopt fiscal best practices
- Benchmark local government competitiveness on key site location factors
- Strengthen local governments and school districts and encourage service sharing:
  - Align state and federal program boundaries with regional economies
  - Preserve the Emergency Financial Management Act
  - Limit local debt service to 10% of local operating expenses
  - Preclude local governments from offering defined benefit retirement plans and retiree health care benefits to new hires
  - Provide regions the ability to identify and fund regional assets

Support federal policy changes that enhance Michigan's competitiveness

- Engage leaders on tax reform, workforce policies, immigration reform, etc.
Goal
Michigan has more talent and is better connected to the world than competitor states.

Why it’s important
To fill the jobs of today and tomorrow, Michigan needs to fill its pipeline with an educated and skilled workforce. A globally connected infrastructure is needed to move our people and products around the world to better serve global customers.

Indicator of success
Top Ten state for talent and global connectivity (air access, international trade, etc.)
Connect Michigan to the world through strong infrastructure

- Adopt solutions that support a strong transportation system
- Develop critical rail connections
- Strengthen Michigan’s logistics infrastructure
- Fully develop VantagePort (formerly Detroit Region Aerotropolis)

Ensure every Michigan child is ready to learn and advance

- Increase public awareness of the value of education
- Expand high quality pre-school education
- Maintain competitive academic standards including the Common Core State Standards and Michigan Merit Curriculum
- Reward schools, teachers and leaders performing at a high level
- Require high school graduation to be based on meeting college or career readiness benchmarks

Increase the number of workers with education and training beyond high school

- Increase out-of-state college enrollment to the national average without reducing in-state access
- Attract educated workers and skilled immigrants to Michigan
- Expand just-in-time, customized worker training programs
- Develop a long-term strategy to ensure Michigan has a Top Ten community college and university marketplace

Achieve Top Ten community college and university affordability by increasing performance-based funding

Improve the connection between education and careers

- Increase opportunities for high school and college students to participate in school-to-work transition experiences
- Require community colleges and universities to track graduate placement results
Goal
Michigan is known as a hub of innovation and as a thriving, welcoming state.

Why it’s important
Michigan must cultivate its strongest assets to ensure lasting prosperity. From our core cities to our abundant human, technological, and natural resources, we can make the most of what we do best to grow a brighter future for our state.

Indicator of success
Top Ten state for jobs, personal income, GDP and population.
michigan turnaround plan

Grow a New Michigan economy by leveraging assets with the greatest potential to meet future global economic needs (see p. 18-19)

- Engineering talent into a Global Engineering Village
- Geographic location into a Gateway to the Midwest
- Automotive industry into a Global Center for Mobility
- Natural resources into a Natural Resources Economy
- Health and medical expertise into a Life Sciences Hub
- Higher education system into a Higher Education Marketplace

Grow Detroit into a thriving central city by attracting new investment, improving city services and repopulating neighborhoods

- Champion the delivery of the basics: safety, services, ethics, fiscal integrity
- Encourage greater alignment on community priorities
- Facilitate job creation

Make Michigan an aspirational destination by being a welcoming place to all

- Attract skilled immigrants and facilitate their relocation transitions
- Expand cultural exchange programs
- Prohibit discrimination based on sexual orientation for employment just like we do for race, color, religion, sex, national origin or disability

Reclaim Michigan’s reputation as a center for innovation by advancing a holistic strategy

- Become a Top Ten state for the availability of venture capital
- Provide Top Ten entrepreneurship and innovation services
- Remove legal and regulatory barriers to entrepreneurship and innovation
- Promote the automotive and manufacturing industries as engines of innovation
- Showcase Michigan’s innovation at entry portals to the state – define visitor and resident perceptions by featuring innovative Michigan products and services
- Become a convening center for entrepreneurship and innovation conferences, competitions and research

New Michigan opportunity jobs are growing

2X the rate of the state as a whole

Michigan can grow total economic output

$31 Billion per year with Top 10 performance in New Michigan opportunities

over 10% of business owners in Michigan are immigrants

Top 10 in R&D for R&D Expenditures at Universities
newmichigan

A 10-year plan to leverage distinctive Michigan assets to grow a New Michigan economy

Strong base of entrepreneurship, innovation and manufacturing
The Michigan Turnaround Plan features an aggressive strategy for growing a New Michigan economy. It identifies opportunities based on Michigan’s unique assets with the highest potential to create thousands of good paying jobs over the next ten years. The framework for a New Michigan economy highlights six areas. If leveraged properly, each offers great promise for success. Together, they have the potential to make our state into a vital economic powerhouse.

**Global Engineering Village**

Global demand is increasing for high-tech manufacturing industries such as aerospace, medical devices, and precision instruments. These and other industries rely heavily on quality engineers, who are in abundance in Michigan. Encouraging the automotive industry to adopt cutting-edge technology, fostering innovation in advanced manufacturing industries, and embracing start-ups can help Michigan capitalize on this opportunity.

**Gateway to the Midwest**

The movement of goods and people is crucial to economic growth and success. Michigan’s geographic location enables it to be accessible by road, rail, sea, or air. Michigan can build on this advantage by advancing as an integrated, multi-modal hub for trade. Specifically, Michigan has the capacity to encourage the development of aviation-dependent businesses and international border crossings.

**Higher Education Marketplace**

Economic growth is being driven by gains in productivity, and gains in productivity are driven by talent and talent-generated innovation. As a primary source of both talent and innovation, our higher education system represents a major opportunity to grow Michigan’s economy. In addition, higher education institutions are drivers of economic growth as they bring students, employers, and additional spending to local economies.

**Natural Resources Economy**

Today, the demand for natural resources is more pressing than ever. The development of technologies that maximize the production of scarce resources in a sustainable way is crucial for succeeding in natural resources markets. Michigan also has competitive advantages in agricultural innovation, and can leverage its natural beauty to increase its tourism industry.

**Global Center for Mobility**

Michigan has been a center for automotive innovation for as long as cars have existed. The state has a unique opportunity to continue to expand with the automotive industry, by transforming the existing automotive cluster to a hub of a diverse set of industries that meet the demands of global mobility. Michigan can increase its focus on multi-modal sustainable transportation.

**Life Sciences Hub**

The demand for a higher quality of life persists among developing and developed nations alike. The search for life sciences solutions is causing health care expenditure growth to outpace GDP growth in the developed world. Michigan produces a large number of bio-science degrees. This combined with its high-end medical research facilities, and expertise in bio-pharmaceutical products and medical devices gives Michigan unique advantages to advance as a Life Sciences Hub.
Since the Michigan Turnaround Plan was released in 2009, significant actions have been taken or are underway that align with the plan.

The following shows the progress made to date — approximately one-third of the original plan has been addressed.
Responsibly Manage Finances
- Improved revenue and expenditure forecasts
- Multi-year financial and budget plans
- Citizen friendly balance sheet
- Reduced state debt by one-third
- State agencies required to implement spending plans with a strategic mission, vision and goals
- Improved state bond rating

Effectively & Efficiently Provide Public Services
- Aligned public employee health care premiums with the private sector
- Removed statutory barriers and provided incentives to encourage local service sharing
- Passed public school employee retirement reforms estimated to reduce unfunded pension and health care liability by $16 billion
- Passed emergency manager law to help locals “fix the basics”

Create a Competitive Business Climate
- Improved Michigan’s corporate tax climate by replacing the MBT with a flat corporate income tax
- Improved Michigan’s regulatory climate by: rescinding over 1,000 obsolete and redundant rules; and requiring a cost benefit analysis for all proposed rules
- Passed legislation to allow for the gradual phase-out of the Personal Property Tax
- Expanded technical worker training
- Grew venture capital to #19 nationally
- Reformed Unemployment Insurance system

Strategically Invest for Future Growth
- Increased funding for higher education based on performance
- Increased access to early childhood education for underserved students
- Increased funding for transportation
- Reached agreement to build new international bridge

Accelerate the Growth of Cities & Metros
- Adopted Michigan urban strategy
- Increased investments in cities
- Adopted regional economic development model

Leverage Assets to Grow the New Michigan
- Identified Michigan’s six most promising existing assets to accelerate growth
- Developed and implementing strategies for 4 of the 6 assets: Higher Education Marketplace, Gateway to the Midwest, Global Engineering Village and Global Center of Mobility
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<thead>
<tr>
<th>Name</th>
<th>Company/Role</th>
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<tr>
<td>JEFF M. FETTIG</td>
<td>CHAIR OF THE BOARD Whirlpool Corporation</td>
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<td>TERENCE E. ADDERLEY</td>
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<td>Michigan State University</td>
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<tr>
<td>SAM SIMON</td>
<td>Atlas Oil Company</td>
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<td>MATTHEW J. SIMONCINI</td>
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<td>BRIG SORBER</td>
<td>Two Men And A Truck/International, Inc.</td>
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<td>ROBERT S. TAUBMAN</td>
<td>Taubman, Inc.</td>
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<td>GARY TORGOW</td>
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<td>SAMUEL VALENTI III</td>
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<td>STEPHEN A. VAN ANDEL</td>
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<td>JAMES R. VERRIER</td>
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<td>BRIAN C. WALKER</td>
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<td>THOMAS J. WEBB</td>
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<td>WILLIAM H. WEIDEMAN</td>
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<td>M. ROY WILSON</td>
<td>Wayne State University</td>
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<td>ROGER J. WOOD</td>
<td>Dana Holding Corporation</td>
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<td>WILLIAM C. YOUNG</td>
<td>Plastipak Holdings, Inc.</td>
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<td>Charter One</td>
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*This list represents the board members at the time of printing. For a current list, visit businessleadersformichigan.com.*
Michigan is our home. Business Leaders for Michigan members work, live and raise their families here. We are the companies that you and your neighbors have worked for, shopped at or been served by for years. We are committed to Michigan and show that commitment every day by reinvesting in our state. We are convinced that our state has a bright future ahead. We invite you to join us in driving strategies that accelerate Michigan’s turnaround.

Research for the 2014 Michigan Turnaround was conducted by Business Leaders for Michigan and Anderson Economic Group, a research and consulting firm with expertise in economics, public policy, finance, and industry analysis. The data presented in this report come from several sources, most of which are publicly available. For a detailed list of the sources, please see Appendix A at: www.businessleadersformichigan.com/MTPappendix