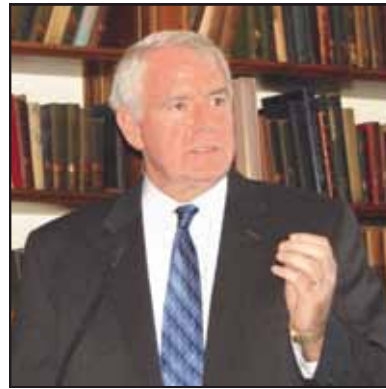
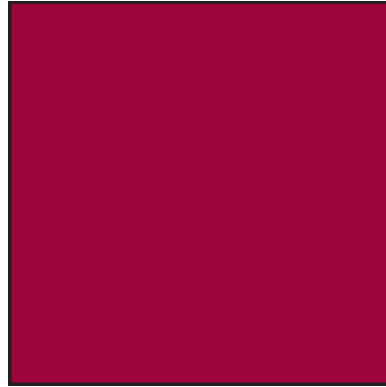




Public Policy Forum

Impartial research. Informed debate.

Annual Report



2012

From the Chairman:

During a year of intense politics involving both a gubernatorial recall and a presidential election, the Public Policy Forum again provided much-needed relief from attack ads and political rhetoric. Our work once again showed the importance of non partisan discourse with thorough research reports, in-depth fiscal analyses, and nonpartisan policy discussions.

Indeed, while laying the groundwork for an exciting series of 100th anniversary events and activities, Forum staff also found the time to publish 18 highly-regarded reports, present their research to dozens of local government committees and civic groups, and appear regularly in the local news media to help shape local policy debates in a nonpartisan and data-driven manner.



Included among our many accomplishments in 2012 were:

- Our reports on shared fire services and consolidated dispatch in the southern Milwaukee County municipalities, which triggered needed discussions about the delivery of public safety services and about shared services in general.
- The first two reports in our multi-year research project on Milwaukee's afterschool programming, including one that was featured in a special panel discussion by the Milwaukee Film Festival.
- A pair of reports on workforce development funding and programming, which have influenced decision-making on the next state budget and promoted greater understanding of the roles played by key workforce agencies in Milwaukee.
- And, most recently, our groundbreaking report on the finances of the Milwaukee Public Schools, which already has launched an informed, community-wide discussion on MPS' resource needs and its appropriate role in the city's education framework.

In addition to producing significant and well-received research, the Forum worked diligently to frame issues and share insights with elected officials, civic leaders and citizens across the region. Forum staff appeared regularly on public affairs broadcasts like WisconsinEye and Lake Effect, moderated voter forums and presented research findings from Wauwatosa to Racine, and worked behind the scenes to educate newly elected supervisors in Milwaukee County and justice system leaders in Sheboygan County.

On the financial front, we finished 2012 with a small surplus, which we will dedicate to improving the quality and affordability of our many special 100th anniversary events in 2013. Thanks again to our loyal members who continue to generously support the one organization in Milwaukee that promotes efficient and accountable government in a constructive and nonpartisan manner.

The year ahead, of course, will be highlighted by our 100th anniversary celebration. We kicked it off in grand fashion with the release of our 100-year history book, great press in the *Milwaukee Journal Sentinel*, and our January annual meeting, attended by nearly 250 members and friends. Our May 9 Gala Dinner featuring David Brooks and E.J. Dionne, and the annual national conference of the Governmental Research Association that we are hosting in July, will provide even more opportunity for both commemoration and policy discussion.

I look forward to working with all of our Trustees, members and supporters as we continue our celebration and begin our journey toward another century of making a difference.

Cordially,

A handwritten signature in cursive script that reads "Susan H. Hatch".

Susan H. Hatch
President
Hatch Staffing Services

Mission

We seek, discover and disclose true and accurate information to enhance the effectiveness of government and public policy in southeastern Wisconsin, the state and the nation; and we facilitate public policy discussion and action.

Vision

Our vision is for a southeastern Wisconsin that is socially and economically healthy, and that deals decisively, responsibly and in a timely manner with public issues. We will be the indispensable resource for objective research and analysis to guide and shape public policy.

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Jacobus Wealth Management

Paul Ziehler
City of West Allis

Performance

The Forum urges local governments to measure performance and share results with constituents, and it applies the same principle to itself. These 2012 results flow from performance objectives established by the executive committee.

- 22:** New members
- 821:** Viewpoint luncheon attendees
- 440:** Salute to Local Government attendees
- 18:** Research reports published
- 23:** Presentations to elected officials/public bodies
- 122:** Stories in print and/or broadcast media about Forum research, in 26 different media outlets
- 13:** Radio and TV appearances by Forum staff, including one national story
- 32:** Posts on the Forum's policy blog, Milwaukee Talkie
- 265,988:** Unique visitors to the Forum's website
- 184:** New Twitter & Facebook followers
- 16,454:** Downloads of top five reports

Public Policy Forum in action



Research

Forum researchers published **18** reports in 2012, building on their award-winning portfolio of local government finance analyses, issuing a pair of studies on workforce development, producing three reports on shared services and two on afterschool programming, plus much more.



Presentations

With **23** speaking appearances in 2012, Forum researchers shared their research and expertise with decision-makers, opinion leaders and concerned citizens. From the State Capitol to the Milwaukee County Courthouse, and from the Milwaukee Regional Medical Center to Oak Creek City Hall, the Forum made its voice heard.



Partnerships needed to address worker gap

Premium content from The Business Journal by Sean Ryan, Reporter
Date: Friday, August 3, 2012, 5:00am CDT

The steady decline in federal dollars coming to Wisconsin for job training programs has the Public Policy Forum of Wisconsin recommending more public-private partnerships similar to the Milwaukee Area Workforce Funding Alliance.



MILWAUKEE • WISCONSIN
JOURNAL SENTINEL
Voucher enrollment jumps after rules eased
Rolls rise by 2,200 pupils, says Public Policy Forum report



Events

The Forum is known for its balanced and provocative programming, which gives members direct access to the views and insights of policy experts and the chance to network with colleagues. In 2012, 1,400 members and their guests attended our Viewpoint luncheons and other special events.



Facilitation

The Forum's objectivity and expertise make it well suited to facilitate problem-solving and collaboration among different governmental entities, and to help local governments plan strategically. In 2012, Forum staff facilitated more than a dozen meetings and strategic planning sessions for local governments.



Economic Development

Economic development is a priority research area for the Forum, with particular focus on economic development policies pursued by local governments, academic institutions, and community-based organizations. Our research agenda includes topics that directly relate to job creation and tax base growth, as well as topics that play a strong indirect role in the health of our regional economy, such as workforce development, transportation, and vocational education. Much of our work in this area is underwritten by the Helen Bader Foundation.

In 2012, we focused our economic development research on state and local workforce development policy and funding. In July, we released **Wisconsin's Workforce Development System 2012: A Graphical Guide to Employment and Training Resources in Wisconsin**. The report tracked the flow of federal workforce development funds into Wisconsin and how those funds were



distributed by state agencies to local workforce programs and services.

Findings from the report were used by Tim Sullivan, a special consultant to the Governor, to inform his recommendations regarding state workforce development policies. Both Sullivan and DWD Secretary Reggie Newson spoke at a Forum "Policy in a Pub" event at which members were briefed on the report's findings.

We followed up the state-focused report with one on Milwaukee's workforce development landscape in early December. The report – **Pathways to Employment** – analyzed the

resources and activities of the city's key workforce development players, and assessed their ability to serve the needs of both job seekers and employers. One of the report's key findings – that the city's sector-specific economic development strategies may not be in tune with the needs of its unemployed population – will be the subject of further Forum research in 2013.

Economic development also was the focus of three Viewpoint luncheons in 2012. A May Viewpoint addressed the future of the Park East Corridor, and included Milwaukee County Executive Chris Abele and Milwaukee Development Commissioner Rocky Marcoux. In September, we focused on the region's new affordable housing plan with a panel that included Milwaukee Alderman Michael Murphy and New Berlin Mayor Jack Chiovatero. Finally, in October, we turned our attention to information technology infrastructure with a panel that included Milwaukee's Chief Information Officer and other technology experts from the private sector and academia.

"We think the Forum asked a great question, one that city officials must try to answer even if it means hiring outside help to do so"
Milwaukee Journal Sentinel editorial, 2/4/12



SEWRPC Executive Director Ken Yunker presents a draft of the region's new affordable housing plan to Forum members and guests at a Viewpoint luncheon in September.



Education/Early Childhood

During the past two decades, the Forum has built a reputation as the region's premier source of impartial data and analysis on K-12 education issues, with annual reports on the demographics, achievement and financing of public and private schools. In 2007, we expanded our portfolio to include early childhood education, launching a multi-year research project on child care quality that helped shape state policy and garnered a national award from the Governmental Research Association.

In January 2012, we published the final report in our early childhood education series. The report – **Youngstar at One Year: An Analysis of Child Care Quality in Milwaukee County** – reviewed the first year of the state's new quality rating system and its impact on local providers. A key finding was that more than four-fifths of Milwaukee County's rated child care providers stood to lose funding under YoungStar because they had



received ratings of two stars or less.

Soon after concluding our early childhood project, and armed with financial support from the Herzfeld and Argosy foundations, we launched a new multi-year research project on afterschool programming in Milwaukee. In July, we released the first report in that series, **Afterschool in Milwaukee: Is it Child Care?** The report provided a broad overview of afterschool programs in Milwaukee, analyzed the extent to which afterschool programs are funded and regulated like child care, and summarized funding and regulatory models from other states. Three months later, we released

Readiness for Quality Ratings Varies Among Milwaukee Afterschool Programs, a research brief that described the results of a comprehensive survey we conducted of local afterschool providers.

We also produced our annual analyses of the region's public schools, Milwaukee Parental Choice Program schools, and the Racine Unified School District. The two public schools reports contained expanded sections detailing major changes in state and federal standards and accountability policies, while our report on Milwaukee's choice schools analyzed the impacts of recent state legislative changes that expanded eligibility for the program.

A major part of the Forum's education research agenda in 2012 also involved school finances. Our comprehensive reports on the finances of the Milwaukee Public Schools and support services spending in Milwaukee County's suburban districts are described on the following page.

"The Forum's work has raised a variety of questions for policy-makers to consider, from how money could be better directed to help support more families, to what the public expects from a quality provider."

Milwaukee Journal Sentinel, 10/9/12



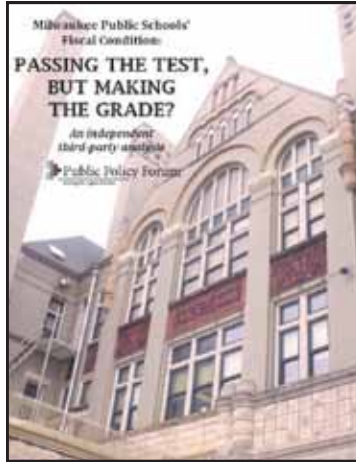
Four of the region's foremost economic development leaders discuss development possibilities for the Park East Corridor with moderator Tom Daykin at a May Viewpoint.

Wisconsin Department of Public Instruction Superintendent Tony Evers discusses his new proposal for school funding at the Forum's quarterly Trustees meeting in December.



The Forum has made a concerted effort to return to its "roots" with an increased focus on local government fiscal analysis and the important relationship between fiscal planning and the quality of government services. We spend considerable time assessing expenditure and revenue trends and preparing forecasting models. The Northwestern Mutual Foundation has supported much of our work in this area.

The centerpiece of our local government finance work in 2012 was our 84-page report assessing the financial condition of the Milwaukee Public Schools, entitled **Passing the Test, but Making the Grade?** The December report received front page coverage in the *Milwaukee Journal Sentinel* and launched a community-wide discussion of MPS' financial prospects on the newspaper's op-ed page and local education blogs, as well as in civic settings such as the Greater Milwaukee Committee and Greater Milwaukee Foundation.



We also explored local school district financial issues outside of MPS, publishing **Spending Outside the Classroom: An Analysis of Support Service Costs in Milwaukee County's Suburban School Districts** in March. The report showed expenditure amounts for each district on support services, and how they compare to peers from other counties. It also explored the potential for greater non-instructional service sharing among Milwaukee County's suburban districts.

The emphasis on shared services reflected another key research priority for the Forum in 2012. In May, we released our highly

anticipated report on **Exploring Shared or Consolidated Fire Services in Southern Milwaukee County**. The report, which involved the participation of fire chiefs and administrators from five municipalities, provided a series of options for enhanced service sharing, including one that would save more than \$1 million annually from a full consolidation of the five municipal fire departments. In September, we followed that report with **Modeling a Consolidated Dispatch Center for Milwaukee County's South Shore**, which similarly laid out options and potential cost savings for different service sharing scenarios. Both reports continue to be discussed by policymakers in 2013.

Finally, our annual analyses of the proposed budgets of the Milwaukee mayor and county executive received widespread attention by the local media, and served as an important source of independent analysis for aldermen and supervisors as they deliberated the budgets' nuances.

"The last sentence of the Public Policy Forum report frames the challenge for us all."

Superintendent Gregory Thornton, Milwaukee Journal Sentinel, 12/22/12



The WisconsinEye public affairs network devoted a half-hour "Newsmakers" program in December to the Forum's comprehensive fiscal assessment of the Milwaukee Public Schools.



Other Policy Areas

While economic development, education and local government finance are the three priority research areas established by Forum Trustees, our research staff typically tackles issues in several other policy areas - like criminal justice, social services, transportation, and the environment - where our expertise and impartiality are valued by policymakers.

In June, we released our findings on the performance of an innovative mental health case management program. The report – **Milwaukee’s Protective Payee Program: Evaluating its Performance and Role in the Larger Case Management System** – also discussed the program in the context of recommendations made in our highly publicized 2010 report on mental health redesign (co-authored with a national mental health consultant). We found that the program’s outcomes supported the contention that the mental health system would benefit from a broader



array of case management services.

We turned our attention to criminal justice in July with the release of **Milwaukee County Juvenile Recidivism – Metrics and Trends**. This research brief examined the methodologies used by Milwaukee County’s Delinquency and Court Services Division to evaluate its success in reducing the re-occurrence of criminal activity by juvenile offenders. We found that while the county had achieved solid results, the manner in which it was measuring recidivism could use improvement, and we offered an alternative recidivism measure to help the division better monitor the impacts of

its programming and operations.

In October, we released the results of a pair of surveys we conducted in our role as research assistant to the Nursing’s Voice project. Our research brief – **Mental Health Nurses and Their Employers See Enhanced Role for Nursing in Milwaukee County’s Mental Health System** – reported that the separate surveys of 120 mental health nurses and 34 health care employers found similar support for a greater role for nurses in a redesigned mental health system.

The Forum also maintained its tradition of providing behind-the-scenes research support to local governments. We continued to provide research assistance to criminal justice councils in Milwaukee, Waukesha and Sheboygan counties, and also offered technical assistance to Milwaukee County by analyzing Behavioral Health Division budget trends and participating on a work group that develops the county’s five-year fiscal projections.

"It was good to see the recent decision by the Spirit of Milwaukee to hire the nonpartisan Public Policy Forum to study the needs of county-owned facilities."
The Business Journal Serving Greater Milwaukee editorial, 9/7/12



Three retiring Milwaukee County supervisors reflect on their time in office and the future of county government at a Viewpoint luncheon in February.

Milwaukee Journal Sentinel editor Marty Kaiser discusses the newspaper’s evolving role in covering local government at the Forum’s annual meeting in March.



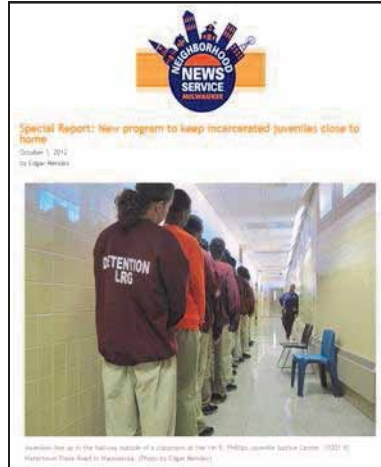
Partnerships

While the Forum has steadfastly sought to preserve its independence over the years to maintain the integrity of its research, we also seek and welcome partnerships to maximize our reach and further our mission of promoting effective and efficient government.

In 2012, we entered into one exciting new partnership while maintaining two others. In September, we launched our new Excellence in Public Policy Reporting fellowship, which is an effort to enhance the quantity and quality of local government reporting in our local news media.

The project stems from a grant by the Milwaukee-based Argosy Foundation and is a partnership between the Forum, the Milwaukee Neighborhood News Service (an online news service that focuses on Milwaukee neighborhoods), and Marquette University's Diederich College of Communication.

Marquette will select two journalism graduate students each



year to serve as Public Policy Reporting Fellows, working 10 hours per week for NNS covering local government news that is relevant to Milwaukee neighborhoods. The Forum will use its knowledge of local government committee agendas and proceedings to guide the fellows on story ideas, as well as to advise them on contacts and research. Our first fellow, Edgar Mendez, produced several hard-hitting stories for NNS during his first semester on topics ranging from child care to county pools to juvenile corrections.

Our partnership with the Faye McBeath Foundation on the

"Nursing's Voice" project also flourished in 2012. The Forum has served as research assistant and fiscal agent for the project, which was initiated in the fall of 2011 after the Foundation secured a substantial grant from the national "Partners Investing in Nursing" project. The goal of Nursing's Voice is to enhance the supply of qualified mental health nurses in Greater Milwaukee. In addition to our survey work for the project (described on the previous page), the Forum has been instrumental in fund development and project communications.

Finally, the Forum continues to house the coordinator position for the Milwaukee County Community Justice Council. The Council was formed in 2008 to ensure that justice system leaders in Milwaukee County (including the Sheriff, District Attorney, Mayor and Milwaukee Police Chief) work collaboratively to coordinate criminal justice policies. The Forum has been providing research assistance to the Council since its inception and has housed the coordinator since 2010.

"Thank you for the rigor and knowledge you bring to the key questions facing Milwaukee today."
Julia Taylor, Greater Milwaukee Committee



The Forum provides research assistance to the Milwaukee County Community Justice Council, a collaboration of justice system leaders that includes District Attorney John Chisholm, Sheriff David Clarke, and Chief Judge Jeffrey Kremers (pictured here at a Forum event).

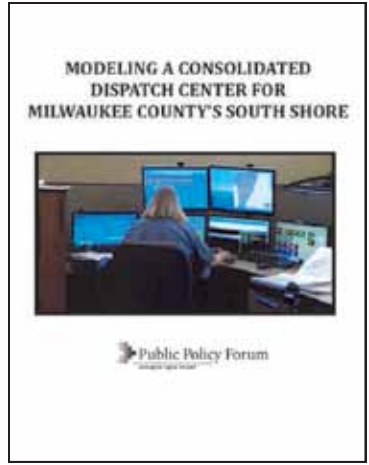


Facilitation

Throughout its history, the Public Policy Forum has sought to promote sound public policy decision-making not only through its fact-based research and analysis, but also through efforts to bring government leaders together to forge consensus and create an environment that is conducive for problem-solving.

In 2012, the Forum continued its facilitation of the Intergovernmental Cooperation Council's "Shared Services and Consolidation Work Group," which was formed at the suggestion of the Forum and Greater Milwaukee Committee to encourage Milwaukee County municipal leaders to explore how they might share or consolidate certain services. The group consists of top administrators from the county's 19 municipalities and Milwaukee County government.

The Work Group met four times in 2012 at Forum-facilitated meetings, where it discussed several service areas considered ripe for sharing, including property tax



assessment, public works, fire, and public safety dispatch. Between meetings, Forum staff collected and synthesized data from each city and village and met with key officials – including the Milwaukee County and City of Milwaukee public works directors and the county executive – to advance possible initiatives.

The shared services effort was initiated in the summer of 2011. So far, it has produced two comprehensive research reports by Forum staff, with a third (on fire service consolidation in Milwaukee County's South Shore) anticipated early in 2013. The Forum also has embarked on a related effort to

explore the potential transfer of the Milwaukee County Water Utility (located on the Milwaukee County Grounds) to the City of Wauwatosa.

In addition, an effort by Greendale officials to explore shared services between the village and school district – facilitated by Forum President Rob Henken – produced an agreement in July to build a new Community Learning Center to house the village's library, health department and parks/recreation department (formerly housed by the school district). Construction should be completed by mid-2013.

Forum staff also was busy in 2012 with strategic planning facilitation. Rob Henken and Research Director Anneliese Dickman facilitated and advised strategic planning efforts by the Greendale and Whitnall School Districts, each of which produced new multi-year plans to guide district programming and finances. Both districts were able to take advantage not only of the Forum's facilitation skills, but also its 25 years of compiling data on the region's public schools.

"The Public Policy Forum did an admirable job."
Gerald Peterson, Oak Creek City Administrator



The Forum's efforts to facilitate discussion on shared services led to a comprehensive report on fire department consolidation in five southern Milwaukee County communities.

Forum President Rob Henken moderates a Greater Milwaukee Committee discussion on Milwaukee's city and county budgets with leaders from the two entities.



20th Annual Salute to Local Government

The Forum promotes accountable and efficient government in numerous ways, including an annual breakfast honoring public sector leaders for outstanding and innovative performance.

Innovative Response to Tough Budget Times Award

Milwaukee County Treasurer
Productivity & Quality Improvements

Inter-Governmental Cooperation Award

Villages of Bayside Brown Deer, Fox Point, River Hills, Shorewood, Whitefish Bay, City of Glendale and North Shore Fire Department
North Shore Consolidated Dispatch Services

Private-Public Cooperation Award

Gorman & Company, City of Milwaukee, Milwaukee Public Library & Northwest Side CDC
Villard Square Project



Effective Use of Technology Award

City of Wauwatosa
Wireless Network Infrastructure

Leader of the Future Award

Jason Dzwinel
Assistant County Administrator & Human Resources Director
Ozaukee County

James R. Ryan Lifetime Achievement Award

James T. Dwyer
Former Waukesha County Board Chairman

Norman N. Gill Award

Sue Black
Director
Milwaukee County Department of Parks, Recreation and Culture



Presentations

Forum researchers constantly seek opportunities to present research findings to decision-makers. Some of the venues we visited in 2012:

Commercial Association of Realtors - Rob Henken shared his views on transportation in the Milwaukee/Chicago corridor with real estate industry leaders.

Milwaukee County Courthouse - Rob Henken, Vanessa Allen and Joe Peterangelo presented findings on juvenile recidivism and mental health case management to County Board committees.

Milwaukee County Executive's Office - Rob Henken delivered a 90-

minute briefing to newly elected supervisors on the ins and outs of county government.

Milwaukee Regional Medical Center - Anneliese Dickman presented the technology transfer report to technology leaders from regional higher education and medical research entities

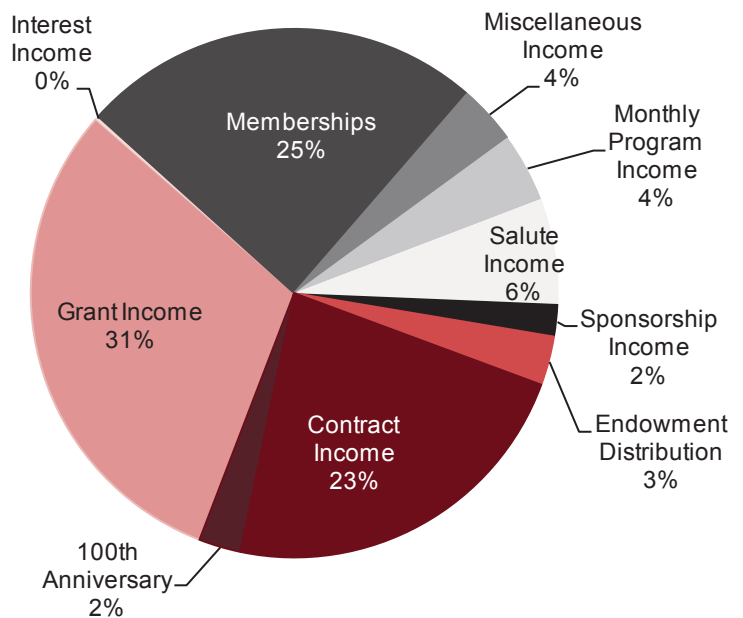
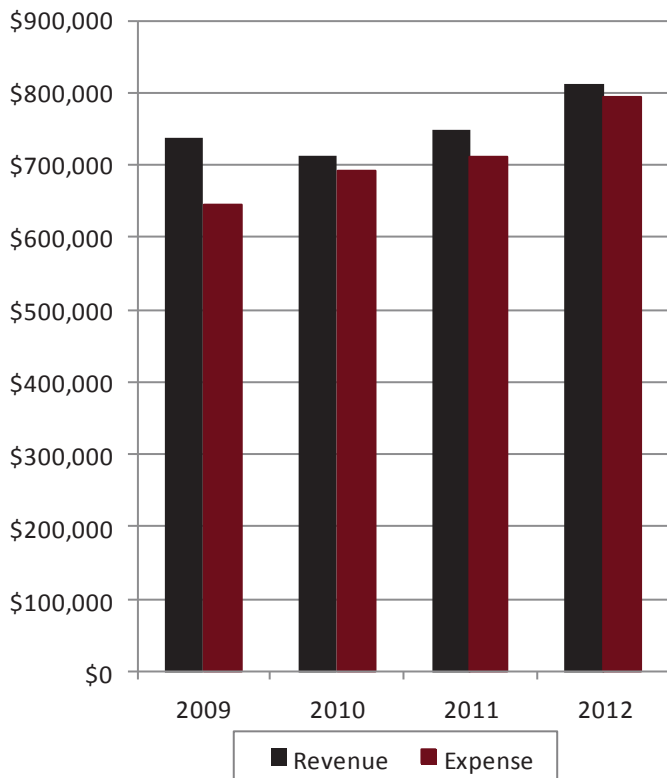
Nicolet High School - Rob Henken, Anneliese Dickman and Jeff Schmidt presented the annual public schooling report to the Nicolet School Board.

Oak Creek City Hall - Rob Henken and Vanessa Allen presented the report on fire service sharing and consolidation to the Oak Creek Common Council.

State Capitol - Rob Henken and Joe Peterangelo presented the state workforce development funding map to the Governor's Council on Workforce Investment.



Finances



The Forum had a strong year financially in 2012. Unaudited results show operating revenue of about \$811,000, an increase of \$61,000 from the 2011 total. Operating expenditures totaled about \$795,000, an increase of \$84,000 over 2011, which included \$61,000 related to preparing for the Forum's 100th Anniversary in 2013. The budget is overseen by the Forum's Finance and Executive Committees, which receive frequent and periodic reports.

The Forum derives 54% of its operating revenue from grants and contracts from local foundations, nonprofits and governments, which support specific research projects or areas of research. A quarter of its revenue comes from membership dues, which support discretionary research projects and activities deemed important by the staff and Trustees. Other major revenue sources include proceeds from the Salute to Local Government and Viewpoint Luncheons.

Staff



Robert E. Henken
president



Anneliese M. Dickman
research director



Pam Matthews
membership/ operations manager



Jeffrey K. Schmidt
researcher/ IT director



Vanessa Allen
researcher



Joseph Peterangelo
researcher



Anne Chapman
part-time researcher



Davida Amenta
part-time researcher

Not pictured: Andrew Pendola, Norman N. Gill Fellow and Edgar Mendez, Public Policy Reporting Fellow



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A.O. Smith Corporation
Argosy Foundation
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Associated General Contractors
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Children's Hospital of Wisconsin
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