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# 2018

## ANNUAL REPORT

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“We salute the Forum for its nonpartisan, rigorously independent and rigorously fair and thoughtful work. Governments are better for it.”

**MILWAUKEE JOURNAL SENTINEL**

Editorial on eve of Forum's 100th Anniversary



# ABOUT US

The Wisconsin Policy Forum is a **statewide, nonpartisan, independent policy research organization** with offices in Milwaukee and Madison. Our mission is to provide informed analysis of critical policy issues affecting local governments, school districts, and the state of Wisconsin. Our research and facilitation activities encourage elected officials and community leaders to find **effective, data-driven solutions** to pressing policy challenges, and promote productive discussion among the public and private sectors.

## OUR MISSION

Research, analyze and, communicate information about the finances, performance, and relationship of state and local governmental bodies in the state of Wisconsin to enhance government efficiency and educate citizens and taxpayers.



## OUR COMMITMENT


We combine the traditions, expertise, and credibility of Wisconsin's two most respected nonpartisan policy research organizations - the Public Policy Forum and the Wisconsin Taxpayers Alliance - to improve the quality of government decision-making in Wisconsin.

We bring to light new knowledge on issues important to state government, local government, schools, Metro Milwaukee, and Wisconsin's economy.

We provide impartial data and analysis that will allow government leaders and the public to consider all sides of critical policy issues.

We create an effective, visible platform to educate and inform policymakers, citizens, taxpayers, the media, and others.





“With your continued support, the State of Wisconsin – and Greater Milwaukee – will continue to benefit from housing one of the country’s premier public policy research organizations.”

**STEVE RADKE**

Vice President - Government Relations, Northwestern Mutual



# FROM THE CHAIRMAN

The inaugural year of the Wisconsin Policy Forum – formed by the merger of the Public Policy Forum and Wisconsin Taxpayers Alliance – could not have gone more smoothly.

As I enter my first year as Board Chairman, I am proud to say that our fact-based research and analysis is receiving more attention and generating more thoughtful policymaking than ever before. That is particularly important given the growing need for objective policy analysis in an increasingly partisan political environment.

On the research front, we produced a remarkable 56 research publications in 2018 on a mix of both local and statewide policy issues. We also saw several important research findings and recommendations lead to action and we engaged hundreds of members and supporters at our wider array of policy events.

Highlights include:

- Our report on expungement policy in Wisconsin has triggered official calls for reform, including the **introduction of legislation by a bipartisan pair of state representatives** that has already been the subject of hearings in the state Legislature.
- Our regular **policy briefs and reports on a broad range of state government finance issues** – ranging from rainy day funds to debt loads to tax collections – attracted widespread and often front-page media coverage and enlightened both citizens and policymakers on the state's fiscal condition and challenges.
- Our report comparing the City of Milwaukee's revenue structure to those of peer cities – *On the Money?* – **won a national award from the Governmental Research Association** and continues to influence discussion about potential ways to diversify the city's revenue portfolio.
- We enjoyed near-record turnout and financial support at our **26th Salute to Local Government** and held a half dozen successful Viewpoint Luncheons and Policy in a Pub events in both Milwaukee and Madison.

The Forum's aspirations continue to grow, with a new state budget in 2019 giving us even greater opportunity to bring our brand of impartial and rigorous analysis to the state Capitol. We will continue to expand our membership and impact across Wisconsin, which also will benefit the southeastern part of the state by giving us greater capacity to highlight to a statewide audience the pressing policy challenges facing Greater Milwaukee.

Thank you to all of our members and supporters for helping the Wisconsin Policy Forum have a very successful first year. With your continued support, the State of Wisconsin – and Greater Milwaukee – will continue to benefit from housing one of the country's premier public policy research organizations.

Cordially,



Steve Radke, Chairman

## BY THE NUMBERS

The Forum urges local governments to measure performance and share results and applies the same principle to itself. These 2018 results flow from performance objectives established by the staff and Executive Committee. The Forum uses these metrics – and many others – to gauge our impact and effectiveness.

**56** # OF  
RESEARCH  
REPORTS  
PUBLISHED

**250+** # OF  
MEDIA  
STORIES

**1,054** # OF  
EVENT  
ATTENDEES

**1,642** # OF  
FACEBOOK  
FOLLOWERS

**1,992** # OF  
TWITTER  
FOLLOWERS

**44,235** # OF  
PAGE VIEWS  
ON WEBSITE



# GOVERNANCE

## EXECUTIVE COMMITTEE

### CHAIRMAN:

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# RESEARCH

ECONOMIC/WORKFORCE DEVELOPMENT

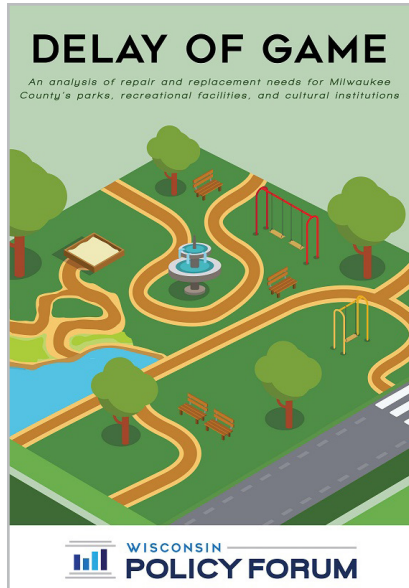
EDUCATION

GOVERNMENT FINANCE

OTHER

We produce relevant and high-quality public policy research that helps generate informed and fact-based public policy decision-making.

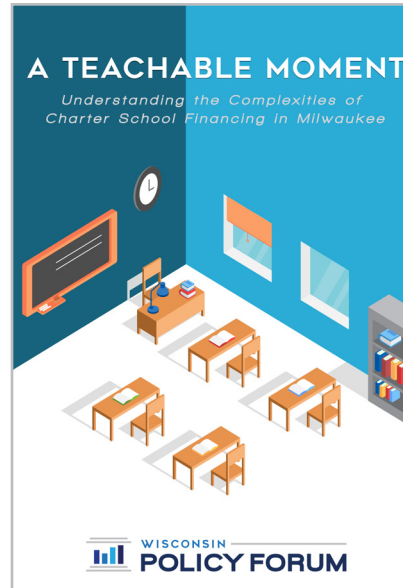
Comprehensive reports, *Focus* policy briefs, and *The Wisconsin Taxpayer* cover a range of topics, including government finance, economic and workforce development, education, and social services.



## DELAY OF GAME

*An Analysis of Repair and Replacement Needs for Milwaukee County's Parks, Recreational Facilities, and Cultural Institutions*

The fourth in our multi-part series on local government infrastructure in metro Milwaukee found a daunting backlog of repair and replacement needs in Milwaukee County-owned parks, recreational, and cultural facilities.

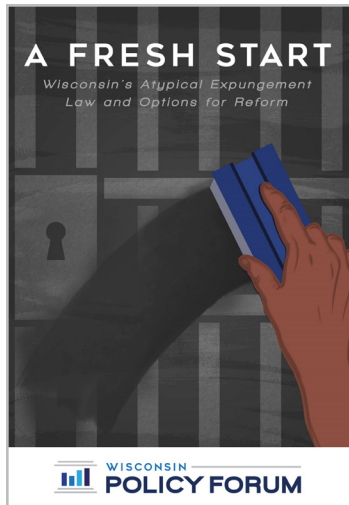


## A TEACHABLE MOMENT

*Understanding the Complexities of Charter School Financing in Milwaukee*

Our report clarifies the charter school funding process in Milwaukee and analyzes financial impacts for both Milwaukee Public Schools and its non-instrumentality charter schools when they contract with one another.

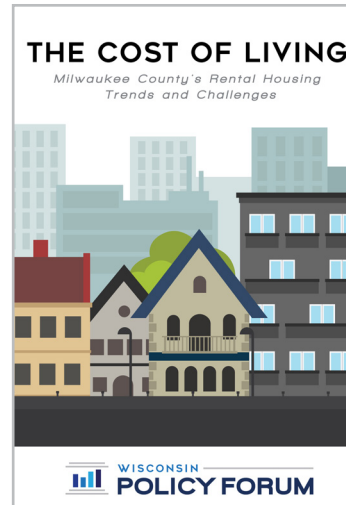




## A FRESH START

*Wisconsin's Atypical Expungement Law and Options for Reform*

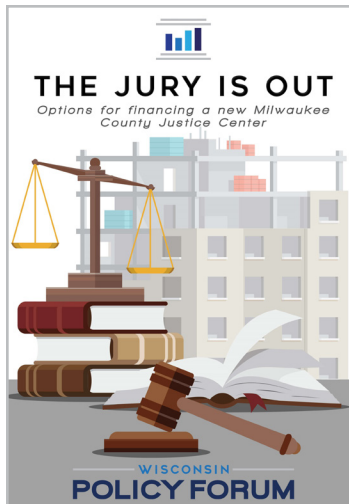
In Wisconsin, 1.4 million individuals have criminal records, which may pose a major impediment to securing a job. Our report considers expansion of expungement opportunities as one strategy to remove obstacles for jobseekers.



## THE COST OF LIVING

*Milwaukee County's Rental Housing Trends and Challenges*

Our report assesses the rental housing landscape in Milwaukee County, comparing affordability and availability of rental housing to neighboring counties and national peers, and analyzing rental housing trends.



## THE JURY IS OUT

*Options for Financing a New Milwaukee County Justice Center*

Our report explores funding options for a new Milwaukee County Justice Center to replace the aging Safety Building. We examine courthouse projects from around the country to gain insights into financing alternatives.

“I can’t overstate how much I’ve used *A Fresh Start* since it came out. WPF’s research perfectly illuminates how an arcane system is not only holding back Wisconsin’s economic growth, but also preventing social justice. The report’s key findings are often referenced by policymakers, will likely become part of a new expungement law, and represents the first step in an unprecedented level of bipartisanship around criminal justice reform. Great work!”

**JEREMY SIMON**  
United Way

## FOCUS

*Focus* is a regularly published policy brief covering a timely issue or trend.

This publication provides concise analysis and provocative data points. Last year, our *Focus* reports on “dark store” property tax challenges, shortage of rural psychiatrists, wheel taxes, and decline in state hunting and fishing license sales sparked statewide news coverage.

## GREEN BAY PRESS-GAZETTE

### WHEEL TAXES GAIN TRACTION AROUND WISCONSIN

MADISON – As Green Bay officials again consider enacting a wheel tax to help fund road repairs, a new report finds a growing number of communities have already taken the step.

More than 20 local governments around Wisconsin have adopted wheel taxes in recent years, resulting in a seven-fold increase since 2011, an analysis by the nonpartisan Wisconsin Policy Forum has found.

### LOCAL GOVERNMENTS TURN TO “WHEEL TAXES” AS OTHER REVENUES LAG

In recent years, Wisconsin has seen a sharp increase in new local government vehicle registration fees. State law requires local governments to use the funding for local transportation costs.

### RULING TRIGGERS RISE IN STATE SALES TAXES, POTENTIAL CUT IN INCOME TAXES

A new decision by the U.S. Supreme Court allows Wisconsin and other states to impose sales taxes on most online sales. The new opinion also triggers an estimated \$120 million cut in state income taxes.

### ARE “DARK STORE” PROPERTY TAX CHALLENGES ON THE RISE?

“Dark store” appeals are made by businesses seeking to lower their property tax assessments and overall tax bill. Our survey of municipal officials suggests they may be rising in Wisconsin.

### RURAL COUNTIES FACE PSYCHIATRIST SHORTAGE

55 of 72 Wisconsin counties face a “significant shortage” of practicing psychiatrists and 20 have none at all. This contributes to an absence of care for many Wisconsin adults needing mental health services.

### WISCONSIN'S PRISON POPULATION ON THE RISE

Wisconsin's adult prison population will reach a record 25,000 inmates by 2021. While the growth has slowed in recent years, substantial additional funding will be needed in the next state budget.

### UNDER THE GUN ON CONSERVATION FUNDING

A decline in hunting – and corresponding license fees – is threatening key conservation funding in Wisconsin. Total deer licenses dropped 5.8% from 1999 to 2017 and the decline is projected to continue.



# THE WISCONSIN TAXPAYER

*The Wisconsin Taxpayer* takes a deeper dive into issues policymakers need to consider.

These magazine - style pieces examine both fiscal and policy issues facing the state and its governments and school districts, as well as demographic developments and trends. Last year, among other topics, the *Taxpayer* untangled state and local funding for special education, compared Wisconsin's incentives for manufacturing to those of other states, and assessed the burden of unfunded retiree health care obligations on local governments.



## A GROWING DIVIDE

[Do levy limits lock in disparities in high- and low-growth municipalities?](#)

Since 2006, the state has imposed levy limits on municipalities to slow local property tax growth. Those limits – which are linked to increases in property values due to new construction – have contributed to growing disparities between high-growth and low-growth communities.



## PROMISES TO KEEP

[Unfunded liabilities improve but still pose challenge for many cities](#)

While Wisconsin's largest cities still face sizable unfunded liabilities for retiree health care, progress has been made to close the gap. Nevertheless, the state's 25 largest cities still hold liabilities of more than \$2 billion, with some facing obligations of thousands of dollars per resident.



## SCHOOL REFERENDA ON THE RISE

[Ballot questions for K-12 funding at highest levels since 1990s](#)

Despite recent increases in state funding, more school districts are turning to referenda to increase spending. This issue looks at recent trends in school referenda and also provides a primer on rural broadband expansion.

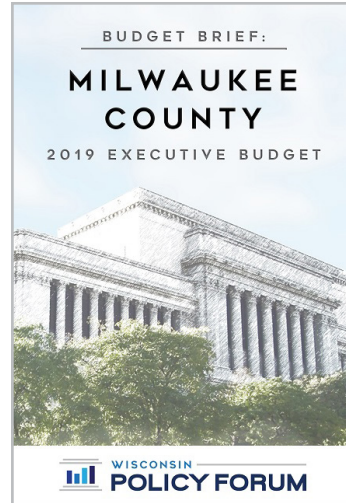
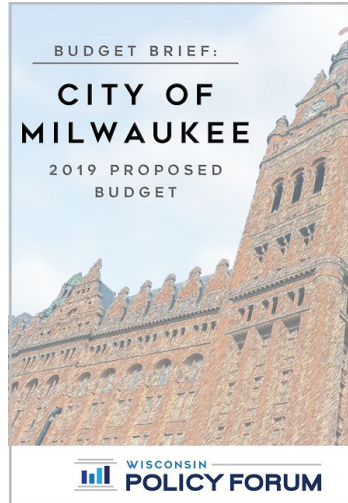


## ASSEMBLING JOBS

[A look at how Wisconsin seeks to foster factories](#)

Manufacturing plays a critical role in Wisconsin, providing nearly a half million jobs and higher than average wages to workers. Tax exemptions and incentives intended to foster the industry are now worth more than \$900 million a year.

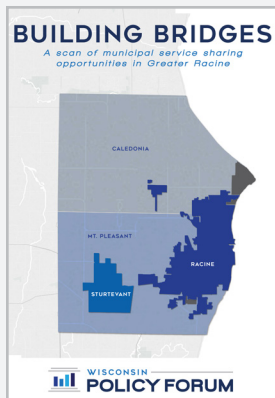
# BUDGET BRIEFS



Our annual budget briefs provide information about the government's basic financial framework, the specific expenditure and revenue challenges facing the government that year, and how the proposed budget resolves them. We seek to objectively frame the key issues and decisions that are at the heart of the budget – not only for citizens, but also for policymakers themselves. In 2018, we covered Milwaukee's three largest local government entities. In 2019, we added state government. We hope to expand our briefs to other large governments in our state.



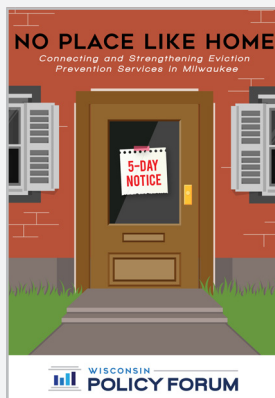
# SERVICE SHARING AND FACILITATION



## BUILDING BRIDGES

*A Scan of Municipal Service Sharing Opportunities in Greater Racine*

With the arrival of Foxconn, municipal governments in Greater Racine will face vastly increased demands for local government services. In this report, we explore how those governments might collaboratively respond.



## NO PLACE LIKE HOME

*Connecting and Strengthening Eviction Prevention Services in Milwaukee*

We facilitated a local stakeholders group seeking to collaborate on eviction prevention efforts in Milwaukee. Our report summarizes the group's initial recommendations to improve coordination and fill service gaps.

Our objectivity and expertise make us well-suited to facilitate collaboration among different government entities. We bring government leaders together to forge consensus and create an environment that is conducive to problem-solving.



“The study provided a series of suggestions that may improve the quality of life and save spending for residents and governments of Greater Racine’s municipalities.”

## RACINE JOURNAL TIMES

Sept. 29, 2018, reporting on the Forum’s “Building Bridges” analysis of local government service sharing in Racine County.

# MEDIA COVERAGE



To ensure that our policy research reaches policymakers and citizens, we actively disseminate our reports via the news media, social media, our policy blog, and other platforms. Forum researchers also are regularly contacted by reporters for their objective insights on policy issues, and they appear often on local radio and television news programs.



DAILY  
REPORTER

NPO  
NORTHWESTERN POLICY QUARTERLY

BizTimes  
MILWAUKEE BUSINESS NEWS



JOURNAL SENTINEL  
MILWAUKEE-WISCONSIN  
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The  
Economist

Green Bay  
Press Gazette.



LA CROSSE  
Tribune

The Journal Times

NEWS/TALK  
1310  
WIBA



WHBY  
REAL. LOCAL. RADIO.

WUWM 89.7  
MILWAUKEE'S NPR

Milwaukee  
Record



WISCONSIN  
STATE JOURNAL



The Janesville  
Gazette



DOOR COUNTY  
PULSE

WISBUSINESS.COM  
Wisconsin's Business News Source

# SHARING OUR KNOWLEDGE

Presenting our research and policy insights to our members, including government and civic entities, is a top priority. Members, civic groups, elected officials, and advocacy groups request Forum staff to speak on our research or related policy issues. We welcome the opportunity to organize exclusive policy discussions and brown bag lunches for our members, and our researchers always are available to answer policy-related questions. We are also happy to help our members connect with individuals in government, academia, and elsewhere to obtain policy information and analysis that is critical to their work.

We encourage Forum members to serve on policy committees, including Government Finance, Economic Development, and Education, that meet a few times each year to review research findings and discuss potential new research topics with Forum staff.



“The conversation was very informative and thought-provoking. We are very proud to call ourselves sponsors of the Wisconsin Policy Forum and look forward to seeing more great stuff in the months to come.”

**ANDREW PHILLIPS**

von Briesen & Roper, s.c.



# VIEWPOINT LUNCHEONS

Our popular Viewpoint Luncheons promote in-depth policy discussions and feature knowledgeable speakers covering a variety of timely topics. We host these events in Milwaukee and Madison and regularly draw 150 to 200 civic, government, and business leaders.



## City Governments in Wisconsin: At a Breaking Point?

We reviewed the findings of our research on Milwaukee and Racine finances and state property tax limits. A panel of local municipal leaders offered their perspective on the unique financial challenges facing Wisconsin's largest cities.

### PANELISTS:

**Tom Barrett**, *Mayor, City of Milwaukee*

**Erik Brooks**, *Mayor, City of South Milwaukee*

**Lori Luther**, *City Manager, City of Beloit*

**James Palenick**, *City Administrator, City of Racine*

## Can the Private Sector Help Address Greater Milwaukee's Infrastructure Woes?

We highlighted the key findings of our infrastructure report series. A panel of subject matter experts explored the role the private sector might play in addressing local government infrastructure challenges.

### PANELISTS:

**Chris Abele**, *Milwaukee County Executive*

**Grady Crosby**, *VP Public Affairs & Chief Diversity Officer, Johnson Controls*

**Jodi Gibson**, *President & CEO, Zoological Society of Milwaukee*

**Charles Renner**, *Partner, Husch Blackwell*



## A Fresh Start: When Do Employers Have a Right to Know?

We presented our research that uncovered the atypical nature of expungement policy in Wisconsin. A panel of key stakeholders discussed the state's current expungement framework and the pros and cons of potential policy reforms.

### PANELISTS:

**Shanyeill McCloud**, *Clean Slate Milwaukee*

**Ismael Ozanne**, *Dane County District Attorney*

**Elise Rommes**, *Wisconsin State Council of the Society of Human Resource Management*

**Kelli Thompson**, *Wisconsin State Public Defender*



# SALUTE TO LOCAL GOVERNMENT

The Salute to Local Government is one of the few events in our state that highlights the value of public sector performance and the benefits that public sector innovation and excellence bring to taxpayers and our state as a whole. This event reflects the Forum's strong belief that good government is worth celebrating, and that there are many examples of ingenuity and outstanding performance in local government and school districts that need to be recognized.



## JEAN B. TYLER LEADER OF THE FUTURE AWARD

### **Jeremiah Johnson**

*Director of Operations and Human Resources,  
Muskego-Norway School District*



## JAMES R. RYAN LIFETIME ACHIEVEMENT AWARD

### **Mark Nicolini (co-winner)**

*Retired Budget Director,  
City of Milwaukee*



## JAMES R. RYAN LIFETIME ACHIEVEMENT AWARD

### **Dr. Patricia Greco (co-winner)**

*Retired Superintendent,  
Menomonee Falls School District*



## NORMAN N. GILL AWARD FOR INDIVIDUAL EXCELLENCE

### **Martha Brown**

*Deputy Commissioner, Department of City Development,  
City of Milwaukee*



## INNOVATIVE APPROACH TO PROBLEM SOLVING

City of Milwaukee Municipal Court | *Warrant Withdrawal Wednesday*



## INNOVATIVE USE OF DATA OR TECHNOLOGY

City of Muskego | *DIY Drone Program*



## INTERGOVERNMENTAL COOPERATION

City of Waukesha & City of Milwaukee | *Great Water Alliance*



## PUBLIC-PRIVATE COOPERATION

Sheboygan Falls School District & Bemis Manufacturing | *Innovation Design Center*



# ANNUAL MEETING

More than 150 people attended our inaugural annual meeting. We provided an update on organizational developments, previewed 2018 research projects, and formally swore in our officers & directors.

The program focused on transportation planning surrounding the Foxconn development and how it relates to the broader economic development aspirations of the state and region. Wisconsin Department of Transportation Secretary Dave Ross delivered a keynote address. Then, a panel of prominent local and state leaders reacted.

## PANELISTS:

**Jonathan Delagrave**, *Racine County Executive*

**Jason Fields**, *Wisconsin State Assembly (11th District)*

**Tim Sheehy**, *President, Metropolitan Milwaukee Association of Commerce*

**Craig Thompson**, *Executive Director, Transportation Development Association of Wisconsin*



# POLICY IN A PUB



During our Policy in a Pub events, attendees can learn about timely research, enjoy great policy discussion, and connect with other Forum members in a casual atmosphere. At our summer pub event, we provided a sneak preview of our new research on charter school funding in the city of Milwaukee, which details the city's charter school financial landscape.



# GOVERNMENTAL RESEARCH ASSOCIATION

The Wisconsin Policy Forum's report, *On the Money? The City of Milwaukee's Uncommon Revenue Structure and How it Compares to Peer Cities*, received the award for "Most Effective Education" at the Governmental Research Association's (GRA) annual policy conference.

The GRA was founded in 1914 as the national organization of individuals and organizations professionally engaged in governmental research. GRA's annual awards competition "recognizes exceptional research on state and local governmental issues performed by staff members of governmental research agencies."

The Forum has been a GRA member for decades. Currently, Senior Researcher Joe Peterangelo serves on the GRA's board of directors, and Forum President Rob Henken is a past president of GRA.



## FELLOWSHIPS

### Norman N. Gill & Todd A. Berry Fellowships

These two fellowships are awarded annually to two graduate students to conduct research projects on issues mutually selected with Forum staff and our Fellowship Committee. The fellows work under the tutelage of Forum staff and their work is published as Forum research products.

### Public Policy Reporting Fellowship

The Public Policy Reporting Fellowship is awarded annually to a Milwaukee-area graduate student who produces content for the Neighborhood News Service (NNS) with guidance from Forum staff. The fellowship is made possible by a generous grant from the Argosy Foundation and is a collaborative effort between the Forum and NNS.



# CHAIRMAN'S CLUB

The Chairman's Club was established in 2016 to help build financial capacity to support the Forum's core mission and enhance its communications. Members receive complimentary admission to all Forum events and are invited to private receptions at great venues, like Fiserv Forum, featuring prominent speakers. Many thanks to these generous donors who support the Forum through direct donations or bequests.

**Ian Abston**  
**Jim Barry**  
**Tina Chang**  
**Grady Crosby**  
**Eileen Dubner**  
**Daniel & Marie-Anne Ewig**  
**Moira Fitzgerald**  
**Katherine Gehl**

**Veronica Gunn**  
**Michael Harrigan**  
**Art Harrington**  
**Susan Hatch**  
**Katie Heil**  
**Kristine Hinrichs**  
**Dennis Krakau**  
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**Fred Young**



# FINANCES

In its first official year as a newly merged organization, the Wisconsin Policy Forum ran a small deficit that was anticipated due to several one-time expenses associated with the merger. Most important budget targets – including membership and contract revenue targets – were met. Budget histories from the two legacy organizations were used to develop the 2018 budget.

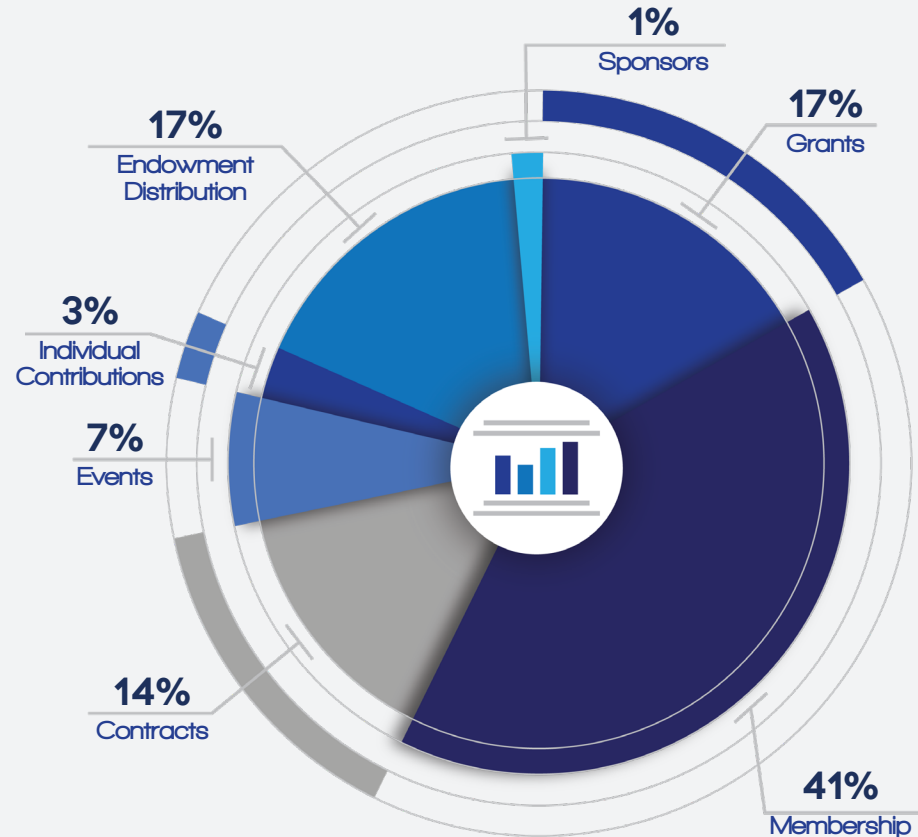
Unaudited operating revenue totaled about \$1.41 million, while unaudited operating expenditures totaled about \$1.47 million. The budget is overseen by the Forum's Finance and Executive Committees, which receive frequent and periodic reports.

Unaudited totals show that in 2018, just over 30% of the Forum's operating revenue came from grants and contracts from foundations, nonprofits, and governments, which support specific research projects or areas of research. Roughly 40% of operating revenue came from membership dues, which support discretionary research projects and activities deemed important by the staff and Directors. The Chairman's Club generated nearly \$30,000 in discretionary revenue.

Another important source of annual revenue is distributions from the Forum's ample reserves. The Finance and Executive Committees approved a new policy in 2018 that generally establishes annual withdrawal amounts of 4% from most reserves.

## 2018 Major Income Sources

*\*unaudited*





# STAFF



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*President*



**Jason Stein**  
*Research Director*



**Therese Schneider**  
*Development & Operations Director*



**David Callender**  
*Communications Director*



**Jeffrey Schmidt**  
*Data & Technology Director*



**Joe Peterangelo**  
*Senior Researcher*



**Anne Chapman**  
*Senior Researcher*



**Betsy Mueller**  
*Researcher*



**Susan Moeser**  
*Researcher*



**Ashley Fisher**  
*Researcher*



**Matt Tompach**  
*Researcher*



**Barb Pariseau**  
*Administrative Assistant*

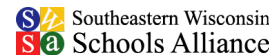
## Not pictured:

Mandy Potapenko, *Director, Milwaukee Community Justice Council*; Erin Perkins, *Project Manager, Milwaukee Community Justice Council*; Yaidi Cancel Martinez, *2017-18 Norman N. Gill Fellow*; Gina Vlach, *2018-19 Norman N. Gill Fellow*; Rachel Ramthun, *2018-19 Todd A. Berry Fellow*; Elizabeth Baker, *2017-18 Public Policy Reporting Fellow*; Analise Pruni, *2018-19 Public Policy Reporting Fellow*; LaLinda Xiong, *Research Intern*

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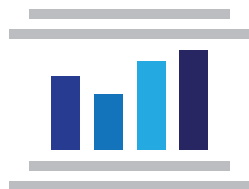
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