“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
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
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
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.

**BY THE NUMBERS**

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
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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 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.

**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.

“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 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.

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.

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.

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.

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.

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 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.
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.
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.

**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.

“We 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.
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.
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.
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.

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
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.

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

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.

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

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

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
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.
PUBLIC-PRIVATE COOPERATION
Sheboygan Falls School District & Bemis Manufacturing | Innovation Design Center

INTERGOVERNMENTAL COOPERATION
City of Waukesha & City of Milwaukee | Great Water Alliance

INNOVATIVE USE OF DATA OR TECHNOLOGY
City of Muskego | DIY Drone Program

INNOVATIVE APPROACH TO PROBLEM SOLVING
City of Milwaukee Municipal Court | Warrant Withdrawal Wednesday
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

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.
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.

**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.
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  
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Grady Crosby  
Eileen Dubner  
Daniel & Marie-Anne Ewig  
Moira Fitzgerald  
Katherine Gehl

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Michael Weiss  
Fred Young
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.
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AECOM
Alliant Energy
Altria Client Services
Alverno College
Alwin Manufacturing Company
American Transmission Company
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General Capital Group
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Goodwill Industries of Southeastern Wisconsin
GRAEF
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Greater Milwaukee Association of REALTORS
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Greater Milwaukee Foundation
Greendale School District
Greenheck Fan Corporation
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Hatch Staffing Services
Heil Family Foundation
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J.P. Cullen & Sons
Jacobs
Janesville Sand & Gravel Company
Jefferson County
Jewish Family Services
John Deere Horicon Works
Johnson Controls
Johnson Foundation at Wingspread
Joxel Group
Judd S Alexander Foundation
Kenosha Beef International
Kettle Moraine School District
Kikkoman Foods Foundation
Kohler Company
Kwik Trip
La Crosse County
Lakeside Foods
Langer Roofing & Sheet Metal
Lauritzen
League Of Wisconsin Municipalities
LISC Milwaukee
Madison Gas & Electric Company
Managed Health Services
Mandel Group
Marcus Center for the Performing Arts
Marcus Corporation
Marin Milwaukee-Kuehn Division
Marquette University
Medical College of Wisconsin
Medical Society of Milwaukee County
Meissner, Tierney, Fisher & Nichols
Menasha Corporation
Menomonee Valley Partners
Mequon-Thiensville School District
Merrill Area School District
Metaltek International
Metropolitan Milwaukee Association of Commerce
Michael Best
Mid-States Concrete Industries
Midwest Food Processors Association
Miller Coors
Milwaukee Area Technical College
Milwaukee Art Museum
Milwaukee County
Milwaukee Downtown, Bid #21
Milwaukee Film
Milwaukee Forge
Milwaukee Health Care Partnership
Milwaukee Metropolitan Sewerage District
Milwaukee Municipal Court
Milwaukee Public Library
Milwaukee Public Museum
Milwaukee Public Schools
Milwaukee Regional Medical Center
Milwaukee Urban League
Mortenson Construction
Mortgage Guaranty Insurance Corporation
Mosinee School District
Mount Mary University
Mueller Communications
NAIOP Wisconsin
National Electrical Contractors Association
National Guardian Life Insurance Company
NFIB/Wisconsin
North Shore Bank
North Shore Fire Department
Northwest Side Community Development Corporation
Northwestern Bank
Northwestern Mutual
Ogden & Company
Oshkosh Chamber of Commerce
Ozaukee County
Pabst Theater Group
Packaging Corporation of America
Park Bank
Penfield Children’s Center
Perlick Corporation
PMA Financial Network
Port Washington-Saukville School District
Potawatomi Hotel & Casino
Precision Plus
Prism Technical Management & Marketing Services
Procter & Gamble
Public Financial Management
Quad/Graphics
Quarles & Brady
Racine County
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