

WISCONSIN POLICY FORUM STRATEGIC PLAN

2020 – 2023

OUR MISSION

We conduct impartial public policy research and analysis to drive informed debate and effective decision-making in the state of Wisconsin.

OUR PURPOSE

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.

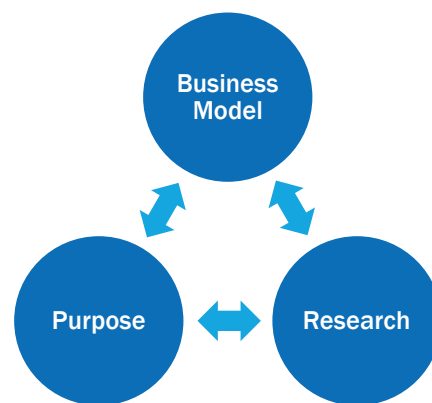
We bring to light new knowledge on policy issues important to state government, local governments, schools, Metro Milwaukee, and Wisconsin's economy and disseminate that knowledge to thought leaders and decision-makers.

We analyze and publish information about the finances of state and local governments and school districts to increase awareness of fiscal and service-level challenges and promote efficient, effective, and equitable use of taxpayer dollars.

BACKGROUND

The Wisconsin Policy Forum was created in January 2018 by the merger of the Milwaukee-based Public Policy Forum and the Madison-based Wisconsin Taxpayers Alliance. We combine the traditions, expertise, and credibility of those organizations and seek (as they did) to improve the quality of public policy decision-making in Wisconsin.

As the merged organization enters its third year, **there is a need to consider the stability of its business model and to revisit how to appropriately align it with the organization's research portfolio and strategic objectives.** As shown in the figure, these three components are interrelated and need to be in sync for the organization to thrive. This document summarizes a series of goals and actions for the next three to five years that are designed to restore the appropriate alignment.



At the time of the merger, WPF leaders decided that the new organization would maintain the former PPF's membership model, as opposed to the subscription/contribution model employed by WISTAX. As reflected by the inclusion of "forum" in the new organization's name, that decision reflects an intention to provide opportunities for financial supporters (i.e. "members") to attend policy discussions and similar events, serve on policy committees, and otherwise be involved in the organization's pursuit of its mission. The decision also conveys a commitment to provide free access to all research products on the organization's website, as opposed to charging for the privilege of accessing WPF's work.

WPF's leadership is firmly committed to continuing the membership model but recognizes new challenges are emerging that are making that model more difficult to sustain, including:

- The **retirement of long-time supporters** at large metro Milwaukee corporate entities, accompanied by difficulty replacing them with new supporters from those firms who show the same level of interest and commitment to WPF;
- **Increased competition from other nonprofits** in areas like social services and K-12 education. There is an understandable desire by some donors to focus on immediate problems and action, as opposed to our commitment to data-driven solutions that often foster longer-term, structural changes.
- Changes in Greater Milwaukee's business landscape, including **the loss of large corporate headquarters** that previously were relied upon for major support and a corresponding need to recruit and retain greater numbers of medium-sized and smaller corporate donors;
- **A lack of personal connections or even basic personal contacts with a substantial portion of the former WISTAX contributor base**, which makes it extremely challenging to retain their support and convert those contributors to members; and
- The recognition that **membership dues can suffer during economic downturns** and that there is a significant probability of a downturn in the not-too-distant future given the prolonged period of economic recovery subsequent to the Great Recession.

At the same time that these post-merger challenges have materialized with regard to WPF's business model, the organization has exceeded all merger-related aspirations on the research front. Since the merger, WPF has produced an average of one research product per week and has broadened its mix of products to include data tools, video report briefs, and interactive charts and graphs. Meanwhile, the quality and relevance of its work have never been higher, as exemplified by its average of 22 media hits per month in major Wisconsin media outlets in 2019, as well as dozens of speaking appearances before civic and legislative bodies.

Indeed, while being cognizant of business-related challenges, WPF's leaders should be prepared to take advantage of several budding opportunities, including the following:

- Vast untapped potential for **new corporate, nonprofit, and governmental members in Greater Madison** once those entities become familiar with WPF's mission and its growing number of research products that address pressing Madison-area policy issues.
- Untapped potential for **new members in Greater Milwaukee**, particularly among newer businesses in the fields of technology and professional services as they become more familiar with WPF's work on regional economic and workforce development issues and its lofty reputation with entities like the MMAC, GMC, and M7.



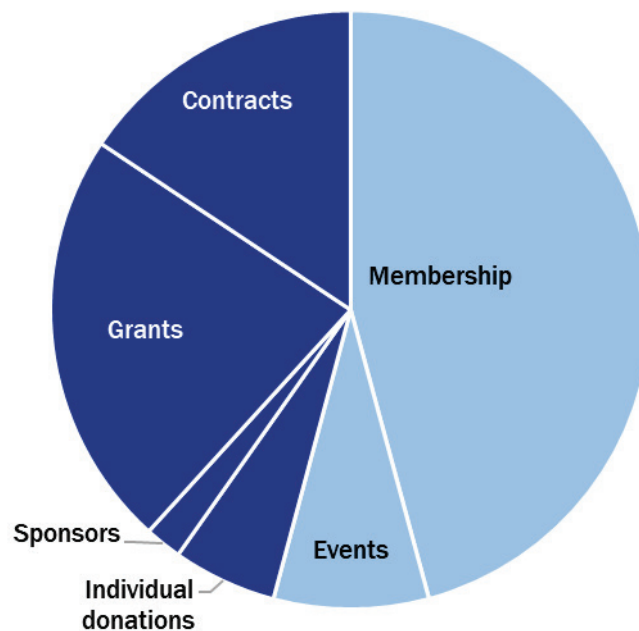
- The growth in **new economic development and innovation-related organizations and young professional groups in Greater Milwaukee** that are seeking partnerships and knowledge and that may offer opportunity for contract research, new members, and future WPF leaders.
- A **growing public thirst for objective and fact-based policy analysis and discussion** resulting from increased partisanship and polarization in both national and local politics.
- The **shrinkage of staff and resources that local governments and school districts can devote to research and analysis**, which produces increased demand for WPF’s research, analytical, and facilitation services on a contract basis.
- Untapped potential for **new members from local governments and school districts** who formerly purchased WISTAX fact books and publications but did not otherwise contribute, as well as from those who have recently become aware of WPF’s data tools and overall portfolio of products.

In sum, WPF’s research productivity and quality and its statewide credibility and influence are significant and growing sources of strength. A key objective is determining how to capitalize on WPF’s research strength to fortify its business model, while at the same time ensuring that the business model provides the necessary resources and independence to sustain the organization’s ability to produce and disseminate highly relevant and impactful policy research.

OUR STRATEGIC OBJECTIVES

We will work to strengthen our business model by increasing the share of our revenue from individual donations, contract and grant income, and sponsorships (see dark blue areas in 2020 budgeted revenue pie chart). That shift will be closely linked – and in many ways dependent – on an increased emphasis on research products that are less purely educational in nature, and that instead are geared more toward addressing difficult policy challenges through compelling analysis and identification of possible solutions.

WPF’s ability to generate new sources of non-membership revenue will flow from its more solutions-oriented approach; and its ability to comprehensively tackle key policy challenges will flow from its new sources of revenue. We recognize that *meeting these objectives will require a more efficient and business-like approach to research project management and a re-dedication of all staff and board resources to achieving these goals.*



Over the next three to five years, we will focus on two primary strategic objectives:



- 1. Focus our research to a greater extent on analysis and solutions.** Over the past two years, our research portfolio has consisted of a roughly equal mix of products that 1) seek to educate, frame, and explain issues to citizens and policymakers; and 2) provide deeper analysis intended to influence policy decision-making. Going forward, we will shift our focus more toward analyzing and influencing and less toward general education. That shift will occur by selecting research topics that we deem worthy of pushing to the forefront of local and legislative agendas, and that involve pressing policy challenges that our expertise and objectivity can help inform or resolve.

While data tools, issue briefs, and general education pieces will continue to be an important part of our research portfolio, a greater proportion of our products will be geared toward articulating new policy insights and producing clear and actionable policy options and solutions. Also, while we will continue to accept contract research projects from governmental entities that involve more “technical assistance” than policy analysis or problem solving, we will take greater care to ensure such projects do not consume too great a share of our research portfolio, particularly if they do not hold potential to inform other governments or have a high likelihood of producing action. Any research we undertake will be guided by this qualifying question: *“Does this research bring to light or help solve a pressing public policy concern?”*

We recognize that this approach carries with it some risk that we will be perceived to be “taking sides” on certain issues, but we believe we have the skill and credibility to lay out options and propose solutions in a manner that will be deemed even-handed and data-driven.

- 2. Expand the non-membership portions of our revenue pie while securing new members in Madison and Milwaukee.** While we acknowledge the challenges to our membership model, we have no intention of abandoning it. Instead, we will seek to maintain our current level of membership funding by building our base in Madison and renewing our efforts to cultivate new membership prospects in Milwaukee. Meanwhile, we will accommodate our need for annual revenue *growth* through increased individual donations, grants, contract income, and sponsorships.

WPF has made significant progress in attracting individual donations since the establishment of its Chairman’s Club¹ in 2015, but we believe this still is a source of potential growth that we can better tap by showcasing policy improvements and discussions that result from our research. We also see strong potential for both grant and contract income growth from projects that target specific pressing issues facing local governments, school districts, and economic challenges throughout Wisconsin.

Our immediate focus on membership growth in Greater Madison does not mean we will abandon efforts to retain and strengthen relationships with former WISTAX contributors across the state and to attract new members statewide. Instead, it reflects our intention to prioritize Greater Madison during the next three to five years (in light of limited staff fund development capacity) before turning our attention to the Fox Valley, Central Wisconsin, and other areas that exhibit growth potential.

¹ The Chairman’s Club consists of individuals who have made an annual contribution of \$1,000 or more that is outside of their organization’s membership dues. Club members receive free admission and exclusive seating at WPF events, recognition on the website, and invitations to special policy discussions throughout the year.



SPECIFIC ACTIONS TO IMPLEMENT OUR STRATEGIC OBJECTIVES

In order to strengthen our organization and implement our strategic objectives, we will focus on the following actions over the next three to five years:

Research Capacity

We will increase our capacity to conduct timely and influential policy analysis through the following actions:

- Eliminating our practice of setting goals for the number of various publications we produce monthly or annually. We will continue to maintain short issue briefs (e.g. *Focus*), magazine-style pieces (e.g. *Wisconsin Taxpayer*), lengthier reports, budget briefs, and data tools in our portfolio. However, we will choose the appropriate publication based on which can be most effectively used to tackle the particular issue we wish to highlight or research, as opposed to having the need to produce a specific publication drive our choice of research topic. **Linked to Strategic Objective 1.**
- Re-shaping personnel policies and practices to establish clear expectations and measurable accountabilities for research staff in terms of output and performance, and to ensure greater symmetry between the time spent on projects and their relative importance to our strategic objectives. This may include introduction of a system to track researchers' time spent on various projects. **Strategic Objective 1.**
- Being more selective in our acceptance of technical assistance-oriented contract research projects to ensure they are not consuming too great a proportion of our research capacity and that sufficient researcher resources are devoted to projects that are consistent with our criteria for relevance and impact. **Strategic Objective 1.**
- Placing the Communications Director in charge of developing content ideas and overseeing content development for *Focus* to ensure that we do not diminish too greatly our capacity to produce these popular short briefs on a regular basis, but that we also preserve sufficient research capacity for more analytical products. **Strategic Objective 1.**

Research Impact

We will strengthen the impact of our research and expand its usage to inform debate and develop data-driven policy solutions through the following actions:

- Presenting clear and actionable policy recommendations or policy options when our research findings compel us to do so and selecting research topics that clearly lend themselves to recommendations and options. Where appropriate, our research products also will emphasize best practices used in other states or metro areas and how those practices specifically could be applied in Wisconsin and Greater Milwaukee. **Strategic Objective 1.**
- Continuing to enhance our use of data visualization, multiple forms of media, and other strategies that will make our research products more accessible, attractive, and digestible to greater numbers of policymakers, members, and citizens. **Strategic Objectives 1 and 2.**
- Engaging our policy committees on a more regular basis for the specific purpose of discussing research project ideas and helping us to identify possible funding sources for lengthier projects. **Strategic Objectives 1 and 2.**



- Seeking additional opportunities to present our research to government bodies, business and civic organizations, conferences, and at brown bag lunches involving our members. Each member of our research staff will be expected to pursue and take part in such opportunities. **Strategic Objectives 1 and 2.**

Contract and Grant-Supported Research

We will proactively develop and seek contract and grant-supported research projects that meet our strategic objectives instead of responding to such project requests when they come to us. This objective will be achieved through the following actions:

- Using our connections with business leaders, chambers of commerce, and local government and school district personnel in Wisconsin’s largest metros to identify needed areas of policy research and potential funding sources for such research. **Strategic Objectives 1 and 2.**
- Cultivating connections with potential philanthropic and corporate funders of our research in metro areas outside of Milwaukee. **Strategic Objectives 1 and 2.**
- Enhancing our efforts to develop contract research project ideas that meet our criteria for impartiality, relevance, and impact and that may have appeal to statewide or metro Milwaukee associations or business groups (such as our recent research on municipal revenue structures that attracted support from the League of Municipalities and Wisconsin Realtors Association). **Strategic Objectives 1 and 2.**

Recurring Research

We will add financial value to our recurring research products by seeking new or additional sponsors and using them to attract new local government and school district members. This goal will be achieved through the following actions:

- Highlighting the value of our School DataTool, Municipal DataTool, and Property Values/Taxes DataTool to education and municipal associations and organizations as well as entities who do business with school districts and municipal governments. **Strategic Objective 2.**
- Highlighting the value of our Innovation DataTool to metro Milwaukee stakeholders who are active in start-up and entrepreneurial endeavors. **Strategic Objective 2.**
- Identifying and approaching civic and corporate entities in Greater Milwaukee and Greater Madison who recognize the value of our Milwaukee, Milwaukee County, Milwaukee Public Schools, and Madison budget briefs to sponsor those publications; doing likewise for potential sponsors for our state of Wisconsin budget brief. **Strategic Objective 2.**
- Making aggressive membership appeals to non-member local governments and school districts through communications and personal follow-up highlighting the utility and quality of our data tools and their free access. **Strategic Objective 2.**

Expanded Metro Area Research

Replicating our successful approach in metro Milwaukee and more recent efforts in Greater Racine, we will become a trusted and sought-after source of timely and hard hitting local government fiscal and policy analysis in other large metro areas across Wisconsin. Recognizing our limited research



staff capacity, we will initiate that effort with a specific focus on Madison and Dane County over the next three years before turning to metro Green Bay, the Fox Valley, and other large metros. We will spearhead our efforts in Greater Madison through the following actions:

- Continuing annual publication of a city of Madison budget brief and carving out capacity to also produce a Dane County and/or Madison Metropolitan School District budget brief. **Strategic Objectives 1 and 2.**
- Engaging Greater Madison members, business organizations, civic organizations, and other stakeholders to discuss and develop ideas for timely and relevant local government and school district fiscal and policy research. **Strategic Objectives 1 and 2.**
- Highlighting Madison and Dane County in research products that present statewide data, like our school and municipal data tools and other projects that address county or municipal data trends. **Strategic Objectives 1 and 2.**
- Holding Policy in a Pub events and/or Viewpoint luncheons in Madison to highlight our work on Madison-area issues. **Strategic Objectives 1 and 2.**
- Organizing brown bag lunches at the offices of Greater Madison corporate members and speaking appearances before Greater Madison chambers of commerce and other business and civic organizations to highlight our work on Madison-area issues. **Strategic Objectives 1 and 2.**

Racial Equity and Inclusion

We will enhance the diversity of our Board, members, and staff and strengthen our commitment to researching issues that are important to communities of color and central to ensuring growth and prosperity in all parts of Greater Milwaukee and Wisconsin. These actions reflect our principles and they are critical to maintaining and enhancing our credibility with policymakers, citizens, members, and funders. We will do so through the following actions:

- As we seek to build our Greater Madison membership base and fortify our Greater Milwaukee membership base (see actions below), we will emphasize recruitment of members, active participants, and prospective directors who are racially diverse and represent all parts of the Greater Madison and Greater Milwaukee communities. **Strategic Objective 2.**
- We are proud of recent research projects involving Greater Milwaukee's Hispanic workforce and Milwaukee's Residents Preference Program. Now, in focusing to a greater extent on research that is meant to influence and inform solutions, we will place an even greater emphasis on projects that address racial disparities and issues of concern to minority populations. **Strategic Objectives 1 and 2.**
- We will strengthen our efforts to recruit and retain a racially diverse workforce by better connecting with minority business and community organizations to advertise our job openings, internships, and fellowships and otherwise implementing strategies to identify and attract minority candidates to seek paid and unpaid positions with the Forum. These actions are important for a variety of reasons, including ensuring that we are more effective in identifying and researching issues important to minority populations. **Strategic Objectives 1 and 2.**



Greater Madison Membership Base

We will build a base of membership support and participation in Greater Madison that approximates levels enjoyed in Greater Milwaukee. Again, this does not mean we will forsake membership recruitment and retention throughout all of Wisconsin, but simply reflects prioritization of Greater Madison over the next three to five years in light of our limited staff capacity. We will expand our Greater Madison membership base through the following actions:

- Successfully implementing a Greater Madison research portfolio as described above and gaining notoriety for such research through media coverage, events, and presentations. **Strategic Objectives 1 and 2.**
- Securing interest and active participation from employees in the Madison offices of Greater Milwaukee members through one-on-one meetings, special events, and brown bag lunches. Enlisting assistance from directors and members in the Greater Milwaukee offices will be central to this effort. **Strategic Objective 2.**
- Converting large numbers of former WISTAX corporate and association members in the Madison area to WPF membership through direct personal communication and assistance from other Greater Madison members. **Strategic Objective 2.**
- Recruiting several new Greater Madison members by using and building on a prospect list and strategies formulated with the help of a Madison-based fund development consultant in 2019. This effort will include an emphasis on younger and racially diverse members as noted above. **Strategic Objective 2.**
- Identifying the resources to hire a part-time membership staff person in Madison or to extend the hours of the part-time administrative assistant in Milwaukee to provide increased membership and fund development and events capacity. **Strategic Objective 2.**

Greater Milwaukee Membership Base

We will limit the erosion of our existing Greater Milwaukee membership base and enhance our recruitment of new members through the following actions:

- Revitalizing our Membership Committee or creating a new Fund Development Committee and using it to target new prospects, re-define our value proposition, and develop new marketing tools. **Strategic Objective 2.**
- Asking and expecting our Directors to be more actively engaged in membership recruitment and in the identification and implementation of new fundraising strategies. **Strategic Objective 2.**
- Enhancing our recruitment of younger and racially diverse members and Directors (as noted above) to assist us in broadening our reach to different types of corporate, nonprofit, and individual membership prospects and maintaining our credibility both in Milwaukee and across Wisconsin. **Strategic Objective 2.**
- Devoting increased time by the President, Development & Operations Director, Board Chair, and Executive Committee to enhancing Board participation, recruiting new Board members, and strengthening Board retention. **Strategic Objective 2.**



- Identifying the resources to hire a part-time membership staff person in Madison or extend the hours of the part-time administrative assistant in Milwaukee as noted above. **Strategic Objective 2.**

Individual Donations

We will build on the success of our Chairman’s Club by broadening our base of individual donors, exploring opportunities to increase the size of donations from both new and existing individual donors, and considering new individual donor strategies. We will do so through the following actions:

- Using our revitalized Membership Committee or a new Fund Development Committee to identify and target new individual donor prospects, including Emeritus Directors and other retired individuals who were once active in the Forum or WISTAX. **Strategic Objective 2.**
- Asking and expecting our Directors to be more actively engaged in individual donor recruitment, including specific strategies to reach out to former Directors. **Strategic Objective 2.**
- Evaluating the potential of new individual donor strategies, including planned giving and special individual sponsorship opportunities for events and research. **Strategic Objective 2.**
- Considering new individual giving categories that exceed the current maximum of \$1,000 and that are accompanied by special recognition or other benefits. **Strategic Objective 2.**

The actions delineated above represent newly prioritized activities for the next three- to five-year period. WPF believes that its current communications strategies and its current portfolio of events are largely successful and do not need to undergo significant modification, with the exception of a need to continue to evaluate the correct number and types of events for the Madison market.

Finally, WPF will continue to evaluate whether its current staffing composition is appropriate to achieve its strategic objectives and to successfully carry out the activities cited above. **In particular, the following staff additions will be considered:**

- A part-time or full-time fund development position (likely in Madison) to support the President and Development & Operations Director in building the Madison membership base, cultivating corporate and philanthropic foundation support outside of metro Milwaukee, and pursuing individual donor strategies.
- One or more new research positions to be filled by an individual or individuals with direct experience in public sector finance or administration to enhance research capacity in the areas of fiscal analysis, service sharing, and government-related contract work; and/or by an individual or individuals with a strong background in economics or statistics to broaden the types of contract research projects we may be able to pursue. This position or positions either could replace existing research positions (if researchers leave through attrition) or potentially could be added if contract research volume grows sufficiently.

