2019

ANNUAL REPORT







The Wisconsin Policy Forum is a statewide nonpartisan, independent policy research organization with offices in Milwaukee and Madison. We 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.

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

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.



FROM THE CHAIRMAN

If the inaugural year for the Wisconsin Policy Forum laid footings for the future, our second year was all about building on them to reach new heights. We are proud to say 2019 was when we realized our promise to become Wisconsin's most valued source of nonpartisan, independent public policy research. This is what we sought in 2018 when we merged the Public Policy Forum and the Wisconsin Taxpayers Alliance. This new organization, we hoped, would uniquely position us to provide informed and objective analysis that would help guide the future of our state and its communities.

Now – as 2020 promises to require enormously consequential decision-making by public officials – we believe our work has never been more vital. Divisiveness and tribalism increasingly dominate our discourse, but we are holding fast to our mission: using objective, data-driven analysis to produce and disseminate nonpartisan research on the most pressing problems in state and local government.

Using this approach, our research team produced 53 publications in 2019. Highlights included:

- The culmination of our five-part series of reports on the city of Milwaukee's and Milwaukee County's deteriorating infrastructure, which helped spur rare consensus on a proposed solution among the region's business and political leadership.
- New levels of media exposure in 2019, with more than 80 media reports in the fourth quarter alone citing our research on state and local budgets, taxes, retiree benefits, medical marijuana, the shifting job market, police staffing, and more. With financial challenges constraining resources in many local media organizations, our trusted voice has become more relied-upon than ever.
- We significantly upped our interactive data research offerings in 2019, capped by our rollout of our newly digitized Municipal DataTool and our much-improved School DataTool.
- Community organizations recognized the Forum as our president, Rob Henken, was the Milwaukee Rotary Club's person of the year for 2019.
- Our events also reached new heights, capped by Our Salute to Local Government event -- which hosted more than 400 attendees and featured keynote speaker Gov. Tony Evers.

While we celebrate our accomplishments in 2019, the current year is bringing immense challenges. We have swiftly pivoted our research focus to the COVID-19 crisis and how it is affecting our economy, schools, transportation network, and local and state governments. We are proud to see government leaders and the news media continue to look to us as one of their most sought-after sources of data and analysis.

In Wisconsin as elsewhere, the road ahead will bring huge public policy challenges. Debates about how to handle them will be heated – and the need for sound decision-making never greater. Amid this, the Forum is redoubling its commitment to our singular mission. We hope to count on your continued support as we forge ahead.

Cordially,

Sa A Rolhe Steve Radke, Chairman

BY THE NUMBERS

The Forum urges local governments to measure performance and share results and applies the same principle to itself. Forum staff and the executive committee establish performance objectives and use these metrics – and many others – to gauge our impact and effectiveness.

REPORTS PUBLISHED

300+ MEDIA 1,215 EVENT ATTENDEES

% OF

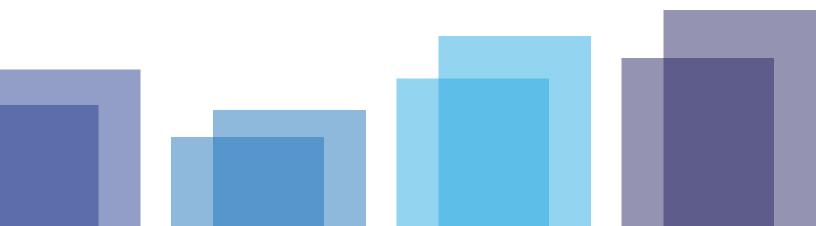
23 SOCIAL MEDIA

GROWTH

220,449

PAGE VIEWS

THE YEAR TO THE END OF THE YEAR



CHAIRMAN:

Steve Radke

Northwestern Mutual

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Foley & Lardner LLP

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Iill Desmond Alverno College

Luella Doolev-Menet American Transmission Company

Alicia Dupies Capri Communities

Rana Altenburg Mustafa Emir Marquette University Clark Dietz, Inc. **James Archambo**

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Veronica Gunn Genesis Health Consulting

Stephanie Hacker GRAEF

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CommonBond Communities Christopher Jackels Davis & Kuelthau, S.C.

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Vicki Martin Milwaukee Area Technical College

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Scott Rover Veolia Water Milwaukee, LLC Freda Russell

AIDS Resource Center of Wisconsin

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BMO Harris Bank **Jeremy Simon** United Way of Greater Milwaukee & Waukesha

County Richard Smith

raSmith

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Guv Stuller Anthem

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Ehlers, Inc. Deborah Tomczyk

Reinhart Boerner Van Deuren s.c.

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Michael Weiss General Capital Group Robert Whitaker

North Shore Fire Department

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Aurora Health Care

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Kathleen Pritchard

Jeffrey Remsik

Roger Schroeder

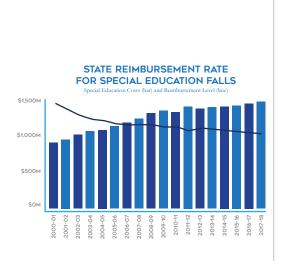
Lisa Robbins

Richard Weiss

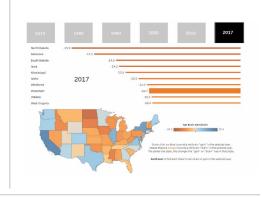
Paul Ziehler

We regularly publish relevant and high-quality public policy research that helps generate informed and fact-based public policy decision-making. Our in-depth reports, Focus policy briefs, and The Wisconsin Taxpayer magazine-style pieces cover a range of topics, including government finance, economic and workforce development, education, and social services.

Our research calls attention to pressing policy challenges and provides data that decision-makers can use. Public-sector officials rely on the Forum for rigorous analysis and creative policy insights, while civic and business leaders use our reports and policy briefs to stay informed and determine where they need to get involved.



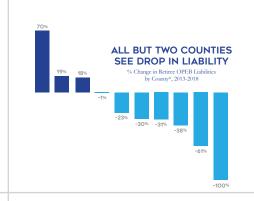




"The Forum excels at boiling down key policy issues into analysis that citizens and business leaders can understand and use."

HELEN JOHNSON-LEIPOLD,

CEO of Johnson Outdoors Inc. and Chairman of the Johnson Foundation at Wingspread

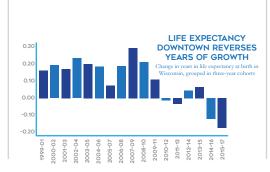


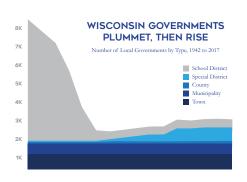


"This report has a lot of great information - I hope the whole council will read it!"

MAYOR SATYA RHODES-CONWAY

City of Madison on the Forum's Madison Budget Brief















Our collection of DataTools provide important information on taxing, spending, and performance in an interactive format that encourages users to run their own comparative reports and draw their own conclusions. Our Municipal DataTool includes data on all 601 cities and villages in the state, while our Property Values and Taxes DataTool explores key trends in important indicators of the state's economic health, the cost borne by taxpayers, and the finances of its local governments. Our School DataTool compares educational data for school districts throughout Wisconsin. We also published our Metro Milwaukee Innovation DataTool, which looked at how the four-county metro Milwaukee region fares on key measures of innovation and the knowledge economy.











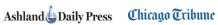
Our objectivity and expertise make us well-suited to facilitate collaboration among different government entities. We bring government leaders together to forge consensus and create an environment that is conducive to problem-solving.





Bringing our research to the public -- which we do through the news media and our social media platforms -- helps ensure our work has maximum impact, and anchors our state's policy debates in nonpartisan facts and data. Our research was cited more than 300 times in local, state and national news outlets in 2019, and news media often seek out Forum researchers as expert sources. Our social media accounts combined had more than 4,700 followers at the end of 2019.















Green Bay Press Gazette.
PART OF THE USA TODAY NETWORK















MILWAUKEE INDEPENDENT



The Journal Times

































NETWORK & LEARN

We communicate our research in many ways, including via presentations to our members. Forum members, civic groups, elected officials, and advocacy groups request Forum staff to speak on our research or related policy issues.

We organize exclusive policy discussions and brown bag lunches for our members, and our researchers always are available to answer policy-related questions.





We connect our members 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 our policy committees: Government Finance | Economic Development | Education | Social Services. Our policy committees meet a few times each year to review research findings and discuss potential new research topics with Forum staff.

VIEWPOINT LUNCHEONS

Our popular Viewpoint Luncheons promote in-depth policy discussions and feature knowledgeable speakers covering a variety of timely topics. We typically attract 150 to 200 civic, government, and business leaders to network and learn at these events which are held in Madison and Milwaukee.

We explored whether Century City is poised to turn the corner, or if challenges will continue to hold it back. A panel of local leaders who have been actively engaged in the effort to make Century City a success provided their take.

PANELISTS:

Joaquín Altoro, CEO, Wisconsin Housing and Economic Development Authority Tom Barrett, Mayor, City of Milwaukee

Cheryl Blue, Executive Director, 30th Street Industrial Corridor Corporation

Rebecca Mitich, Partner, Husch Blackwell & Past Chair, Northwest Side

Community Development Corporation





We discussed the state of education in Wisconsin and provided the Forum's take on the education components of the Governor's proposed budget. A panel of education experts offered their perspective.

PANELISTS:

Jeff Buhrandt, Senior Director of State Relations, UW System
Scott Manley, Senior VP of Govt Relations, Wisconsin Manufacturers & Commerce
Dan Rossmiller, Director of Govt Relations, Wisconsin Association of School Boards
Sharon Schmeling, Executive Director, Wisconsin Council of Religious & Independent Schools



We explored how the next state budget will impact citizens in metro Milwaukee and provided our take on the Governor's proposed budget. A panel of local leaders spoke to the wide range of possible impacts for the state's largest metro region.

PANELISTS:

Suzanne Kelley, President, Waukesha County Business Alliance
Mary Jo Meyers, Director, Mihraukee County Department of Health and Human Services
Mark Mone, Chancellor, University of Wisconsin-Mihraukee
Maxine White, Chief Judge, First Judicial District of Wisconsin



Nearly 200 people attended our 2019 annual meeting on Thursday, January 24. Our program featured a conversation with Wisconsin Department of Administration Secretary Joel Brennan, who discussed the upcoming state budget and the policy challenges and priorities of the new administration. We provided our own analysis of the state's fiscal condition and budget issues and previewed our 2019 research projects. We also formally swore in our officers, new directors, and directors renewing their board terms.







POLICY IN A PUB

Our Policy in a Pub events provide attendees the opportunity to learn about timely research, enjoy great policy discussion, and connect with other Forum members. Milwaukee Mayor Tom Barrett and County Executive Chris Abele were the featured speakers and highlighted the challenges in their upcoming budgets at our Milwaukee event in the summer. We hosted our first-ever Policy in a Pub in Madison in the fall and featured Madison Mayor Satya Rhodes-Conway, who discussed her proposed budget and provided an update on budget deliberations by city leaders.







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. More than 430 people packed the room at our 27th annual Salute on June 25, which featured Governor Tony Evers as our keynote speaker. Our awards recognized governments and school districts for strong financial management, innovation, partnership and cooperation, as well as individuals in the public sector for excellence and lifetime achievement.



JEAN B. TYLER LEADER OF THE FUTURE AWARD

Kayla Chadwich (co-winner)

Administrator/Clerk, Village of Butler

Sam Leichtling (co-winner)

Long Range Planning Manager, City of Milwaukee

JAMES R. RYAN LIFETIME ACHIEVEMENT AWARD

Lynn Green

Retired Director, Dane County Department of Human Services

NORMAN N. GILL AWARD FOR INDMIDUAL EXCELLENCE

Janet Schutz Nelson

Chief Legal Counsel, Milwaukee County Department of Child Support Services

INNOVATIVE APPROACH TO PROBLEM SOLVING

Amsterdam Dunes Preservation Area and Wetland Mitigation Bank | Sheboygan County

INNOVATIVE USE OF DATA AND TECHNOLOGY

Washington County Park Fees | Washington County

INTERGOVERNMENTAL COOPERATION

Improving Fire/EMS Capabilities in Milwaukee Region | North Shore Fire Department, cities of Milwaukee, West Allis, Wauwatosa, Greenfield, St. Francis, and Oak Creek

PUBLIC-PRIVATE COOPERATION

St. Anthony's Place | Milwaukee County and Heartland Alliance



Rob Henken President



Jason Stein



Therese Schneider



Mark Sommerhauser



Jeffreu Schmidt Data & Technology



Anne Chapman Senior Researcher



Joe Peterangelo Senior Researcher



Ashleu Fisher Fiscal Researcher



Ari Brown Data & Research





Researcher



Betsy Mueller Matt Tompach Alyssa Doman Administrative &

Not pictured:

Will Henkes, Summer Research Intern: Chris Paul, Summer Research Intern: Robyn DiGiacinto, Research & Data Analyst

FELLOWSHIPS

We award fellowships annually to two graduate students who are studying in Wisconsin to conduct research projects. The fellows work under the guidance of Forum staff and their work is published as Forum research products.



2018-2019 Todd A. Berry Fellow Rachel Ramthun



2018-2019 Norman N Gill Fellow Gina Vlach



2019-2020 Todd A. Berry Fellow Chalisa Sims



2019-2020 Norman N. Gill Fellow Joe Krivichi

GOVERNMENTAL RESEARCH **ASSOCIATION**



The Forum has been a member of the Governmental Research Association (GRA), which was founded in 1914 as the national organization of entities engaged in governmental research. Senior Researcher Joe Peterangelo has served on the GRA board of directors for four years, and President Rob Henken is a past president of GRA.

ROTARY PERSON OF THE YEAR **AWARD**



One of many 2019 highlights for the Forum was seeing our president Rob Henken, named the Rotary Club of Milwaukee's 2019 Rotary Person of the Year. According to the club, this "recognizes individuals, executives and entrepreneurs who, through their profession, are making the Milwaukee community a better place to live and work." The club said Henken received the award "in recognition of his service to Wisconsin as head of the state's leading independent nonpartisan public policy research organization."

FINANCES

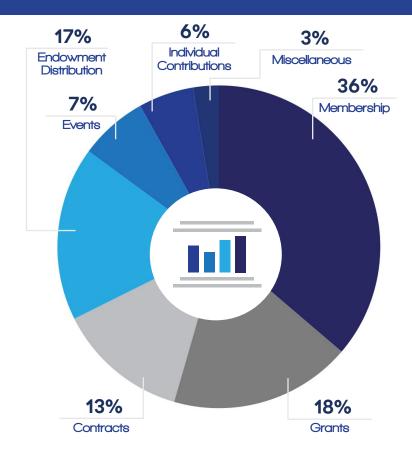
The Wisconsin Policy Forum had another successful year in 2019, despite encountering some challenges with our post-merger business model. Our reserves remain robust and our overall financial condition is excellent. However, some obstacles associated with our membership model demand a new emphasis on individual donations, grants, contracts, and sponsorships. We crafted a new strategic plan that was rolled out in early 2020 to address these challenges and make small course corrections.

Some of our most important budget targets – including grant and contract revenue targets – were met. We exceeded our goal for individual contributions and the Chairman's Club generated more than \$50,000 in discretionary revenue. We also revised and simplified our membership dues structure to reflect the significant value of membership while upholding our commitment to making our research accessible to the general public.

Unaudited operating revenue totaled about \$1.34 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 2019, 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 36% of operating revenue came from membership dues, which support discretionary research projects and activities deemed important by the staff and Directors.

Another important source of annual revenue is distributions from the Forum's ample reserves. Our annual policy allows for withdrawal amounts of 4% from most reserves.



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. These generous supporters receive complimentary admission to all Forum events and are invited to private receptions at great venues featuring prominent speakers. Many thanks to these members who support the Forum through direct donations or bequests.

Ian Abston James Barry **Grady Crosby** Eileen & Howard Dubner Katherine Gehl Jennifer Gonda Veronica Gunn Art Harrington Michael Harrigan Susan Hatch Katie Heil Kristine Hinrichs Dennis Krakau David Lubar David Meissner John Miller George & Susan Mitchell Chas Mulcahy Peter Ogden

Daniel Potter Steve Radke Tom Rettler Leigh Riley Cynthia Rooks **Andy Schiesl** Roger Schroeder Richard Smith **Ricky Smith** Tom Spero **Bradley Viegut** Laura & Scott Vuchetich Carol Ward Knox Joe Wilson Fred Young



Milwaukee Journal Sentinel editor George Stanley spoke to our Chairman's Club about the challenges and triumphs of running a daily newspaper in the digital age.

EVENT & REPORT SPONSORS

























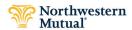








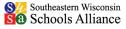




















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SEWRPC Social Development Commission Village of Bayside Village of Bellevue Village of Brown Deer Village of De Forest Village of Elm Grove Village of Greendale Village of Hales Corners Village of Little Chute Village of Mukwonago Village of Shorewood Village of Sussex Village of Thiensville Village of West Milwaukee Village of Whitefish Bay Washington County Waukesha County Wisconsin Department of Transportation Wood County

Racine County

EDUCATION MEMBERS

Alverno College

Cardinal Stritch University Cedarburg School District Concordia University Education Deans of Greater Milwaukee Elmbrook School District Greendale School District Hamilton School District Kewaunee School District Marquette University Merrill Area School District Milwaukee Academy of Science Milwaukee Area Technical College Milwaukee Public Schools Milwaukee School of Engineering Mosinee School District Mount Mary University Mukwonago School District Port Washington-Saukville Schools School District of Brown Deer School District of Menomonee Falls School District of New Berlin Shorewood School District

Somerset School District University of Wisconsin-La Crosse University of Wisconsin-Milwaukee Waukesha County Technical College Wauwatosa School District West Salem School District Whitewater Unified School District Whitnall School District

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Metropolitan Milwaukee Association of Commerce Milwaukee Art Museum Milwaukee Center for Independence Milwaukee Downtown, Bid #21 Milwaukee Film, Inc. Milwaukee Public Library Milwaukee Public Museum Milwaukee Regional Medical Center Milwaukee Urban League Next Door Northwest Side Community Development Corporation Penfield Children's Center, Inc. Rogers Memorial Hospital Rotary Club of Milwaukee Schools That Can Milwaukee Seeds of Health, Inc. Southeastern Wisconsin School Alliance St. Charles Youth & Family Services Inc. United Way of Greater Milwaukee & Waukesha County VISIT Milwaukee Weiss Family Foundation Wisconsin Council of Religious & Independent Schools

Wisconsin Hospital Association Wisconsin Philanthropy Network Wisconsin Women's Business Initiative Corporation YWCA Southeast Wisconsin

We maintain a diverse array of financial supporters that is comprised equally of entities from the corporate, public, and nonprofit sectors.

We also enjoy support from hundreds of individuals across the state.





MILWAUKEE

633 W Wisconsin Ave Suite 406 Milwaukee, WI 53203 (414) 276-8240

MADISON

401 N Lawn Ave Madison, WI 53704 (608) 241-9789

wispolicyforum.org info@wispolicyforum.org





