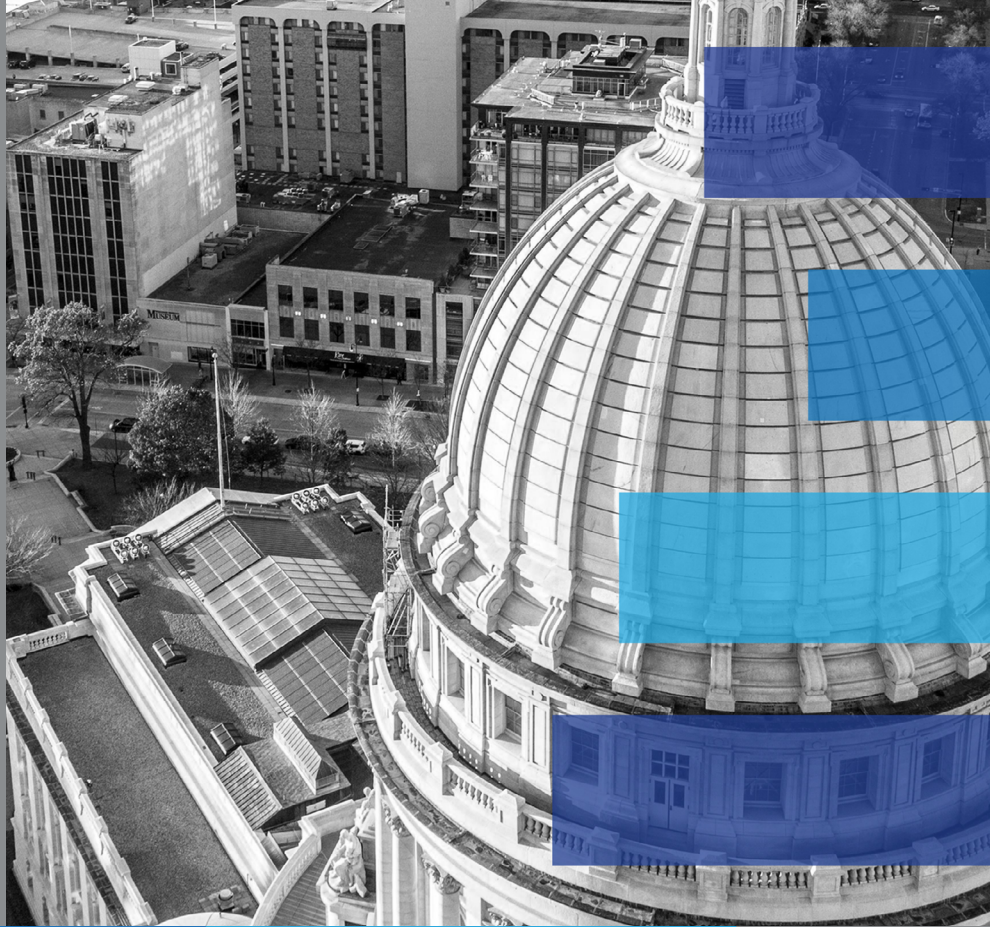

2020

ANNUAL REPORT



The Wisconsin Policy Forum is a statewide nonpartisan, independent policy research organization. We provide informed analysis of critical policy issues affecting local governments, school districts, and the state of Wisconsin. Through research and facilitation activities, we 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.



We bring to light new knowledge on policy issues important to state government, local governments, schools, Metro Milwaukee, and Wisconsin's economy, then disseminate it 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 CHAIR

At the start of 2020, the Forum launched a newly developed strategic plan that was created to guide our organization for the next three to five years. Among our key initiatives were efforts to expand our membership and reach in Greater Madison, tap into a growing demand for our service sharing and fiscal research, and continue to expand our growing statewide influence and credibility with solutions-based policy reports. We also announced plans for a Night of Nonpartisanship gala dinner timed for a month before the presidential election.



Then the pandemic hit and our best laid plans were placed on hold, at least temporarily. As the fight against COVID-19 changed our daily lives, we immediately redesigned our research portfolio and priorities to focus almost exclusively on providing policymakers and citizens with objective analysis that was directly connected to the critical new policy concerns facing our communities and our state.

It is hard to exaggerate how impressed I have been by the efforts of our staff to respond to the pandemic and its impacts on Wisconsin. Their ability to quickly pivot to a COVID 19-focused research agenda and produce report after report on the pandemic's impacts set a new standard of excellence for our organization and helped promote concrete action on many fronts.

We produced a remarkable 58 research publications in 2020 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, albeit virtually.

Indeed, the Forum's critical role in our state as a source of expert, nonpartisan policy analysis and advice has never been more apparent.

As I enter my first year as Board Chair, I look forward to working closely with the Forum's highly respected staff, Vice Chairs Grady Crosby and Cindy Rooks, our Board officers, and all of our members and supporters to ensure that the Forum continues to be both viable and vibrant in achieving its mission. In this era of extreme partisanship, to have an organization like the Wisconsin Policy Forum providing impartial public policy research and analysis is truly critical for our state.

Sincerely,

A handwritten signature in black ink that reads "Leigh Riley". The script is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Leigh Riley
Chair

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.

58 RESEARCH
REPORTS
PUBLISHED

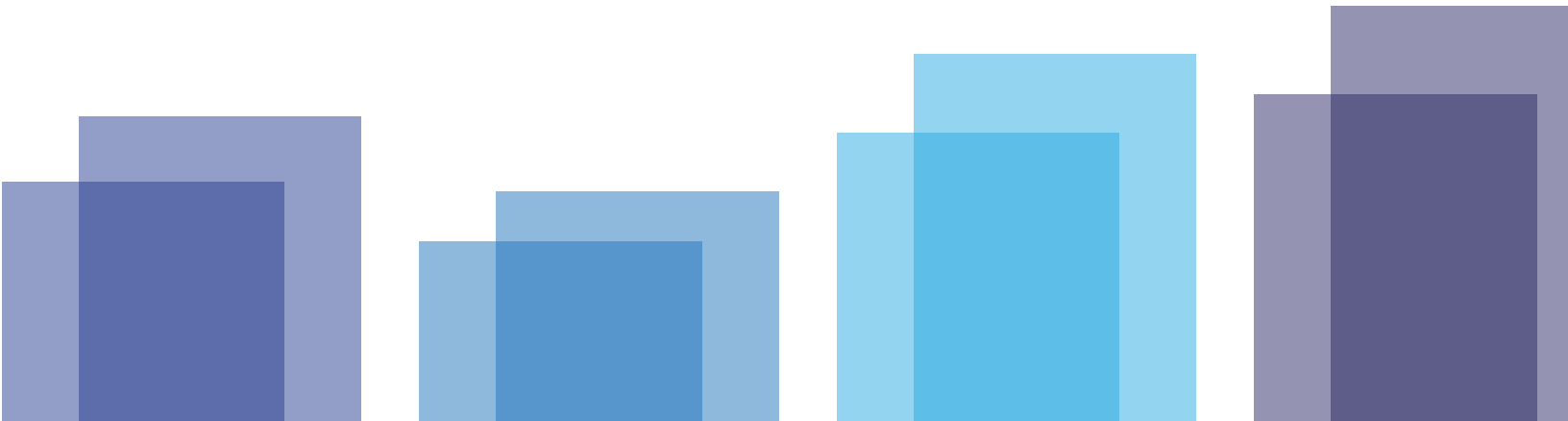
39 ON STATEWIDE ISSUES
13 ON SE WI ISSUES

345 MEDIA
STORIES

5 FORUM FRIDAY
VIRTUAL EVENTS

  **4%**
 **15%**
 **30%** GROWTH IN
SOCIAL MEDIA
FOLLOWERS

100,000+ UNIQUE WEBSITE
VISITS



EXECUTIVE COMMITTEE

CHAIR

Leigh Riley
Foley & Lardner LLP

VICE CHAIRS

Grady Crosby
Johnson Controls, Inc.

Cynthia Rooks

SECRETARY

Tom Rettler
Menasha Corporation

TREASURER

Bradley Viegut
Baird

PRESIDENT

Rob Henken
Wisconsin Policy Forum

Rana Altenburg
Marquette University

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Mark Czarnecki
BMO Harris Bank

Helen Gurholt
A.O. Smith Corporation

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Community Care, Inc.

Steve Radke
Northwestern Mutual

Jennifer Zierer
We Energies

Chris Abele
Argosy Foundation

Griselda Aldrete
Alliant Energy

Lou Banach
Associated Bank

Julie Barbieri
Anthem

James Barry III
The Barry Company

Mike Belot
Milwaukee Bucks

Kevin Brehm
AECOM

Susan Callanan
Northwestern Mutual

Tina Chang
SysLogic, Inc.

Hector Colon
Lutheran Social Services of Wisconsin and Upper Michigan, Inc.

Jill Desmond
Alverno College

Luella Dooley-Menet
American Transmission Company

Alicia Dupies
Capri Communities

Mustafa Emir
Clark Dietz, Inc.

Moir Fitzgerald
Fitzgerald Consultancy

Kelly Fortier
Michael Best & Friedrich LLP

David Gilbert
University of Wisconsin-Milwaukee

Joshua Gimbel
Gimbel Reilly Guerin & Brown, LLP

Veronica Gunn
Genesis Health Consulting

Stephanie Hacker
GRAEF

Art Harrington
Godfrey & Kahn, S.C.

Joe Mar Hooper
Safe & Sound

Christopher Jaekels
Davis & Kuelthau, S.C.

Kathryn Kuhn
Medical College of Wisconsin

Robert Lamb
U.S. Bank

Vicki Martin
Milwaukee Area Technical College

Dan McCarthy
Zilber, Ltd.

John Miller
Arenberg Holdings

Reggie Newson
Ascension

Russ Pederson
Deloitte Consulting LLP

Marci Pelzer
Rockwell Automation

Andy Phillips
von Briesen & Roper, s.c

Timothy Posnanski
Husch Blackwell LLP

Daniel Potter
Grant Thornton LLP

Lindsay Punzenberger
Children's Wisconsin

Adam Raschka
Charter Communications

Scott Royer
Veolia Water Milwaukee, LLC

Freda Russell
Vivent Health

Marylou Schirpke
Town Bank/Wintrust

Laura Schmidt
Milwaukee Tech Hub Coalition

Jeremy Simon
United Way of Greater Milwaukee & Waukesha County

Richard Smith
raSmith

Scott Solverson
HNTB Corporation

Gina Spang
VJS Construction

Gina Stilp
Zilber Family Foundation

Todd Taves
Ehlers, Inc.

Deborah Tomczyk
Reinhart Boerner Van Deuren s.c.

Wendi Unger
Baker Tilly Virchow Krause, LLP

John Walz
Milwaukee School of Engineering

Michael Weiss
General Capital Group

Dan Weltzien
Badger Meter, Inc.

Robert Whitaker
North Shore Fire Department

Joe Wilson
Quarles & Brady LLP

Tracy Wymelenberg
Aurora Health Care

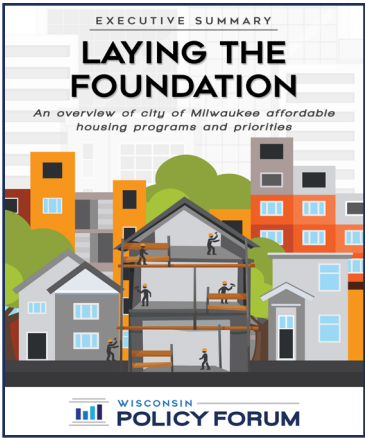
Bruce Block
Jeffrey Browne
Richard Dieffenbach
Tom Finco
Susan Friebert
Michael Harrigan
Susan Hatch
Ed Henschel
Margaret Henningsen
Kristine Hinrichs
Thomas Hlavacek
Michael Juneau
John Kita
Dennis Krakau
Warren Kreunen
Bruce Kruger
Paul Mathews
David Mauer
David Meissner
Chas Mulcahy
Frederick Muth
Hank Newell
Karen Ordinas
Paula Pennebaker
John Peterburs
Joan Prince
Kathleen Pritchard
Jeffrey Remsik
Lisa Robbins
Roger Schroeder
Mike Simmer
Tom Spero
Richard Weiss
Paul Ziehler

Our research publications address timely issues and promote informed and fact-based public policy decision-making. Our portfolio includes in-depth reports, *Focus* policy briefs, and *The Wisconsin Taxpayer* magazine-style pieces that cover a range of topics. Per our strategic plan, our priority research areas include government finance, workforce and economic development, and education. Also, we maintain the traditions of our two legacy organizations -- the Public Policy Forum and Wisconsin Taxpayers Alliance — by emphasizing both issues of statewide importance and those with particular relevance to southeast Wisconsin.

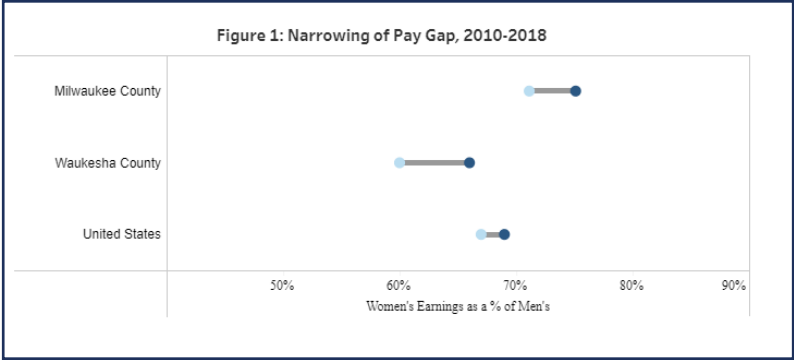
In 2020, after the COVID-19 crisis emerged, we pivoted to research topics that were directly relevant to the pandemic. Our analyses of fiscal impacts on municipalities, counties, school districts, and state government received extensive media coverage across Wisconsin and we presented them (virtually) to hundreds of business leaders, policymakers, and citizens. Additionally, our targeted reports on challenges involving the child care and arts and culture sectors helped initiate direct action by state leaders.

On the following pages, we highlight report covers from some of our most highly publicized in-depth reports in 2020 as well as key visuals from several *Focus* and *Taxpayer* publications.

ECONOMIC & WORKFORCE DEVELOPMENT

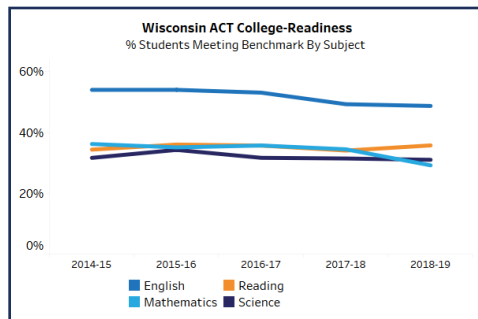


Milwaukee's Gender Pay Gap Narrows But Persists



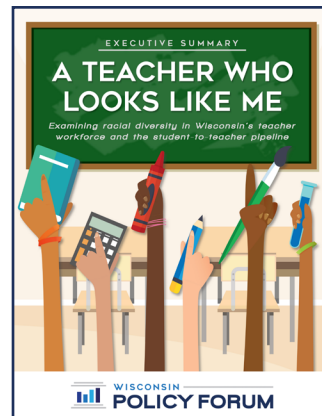
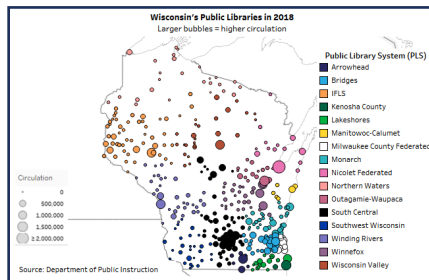
EDUCATION

State's College Readiness Slips

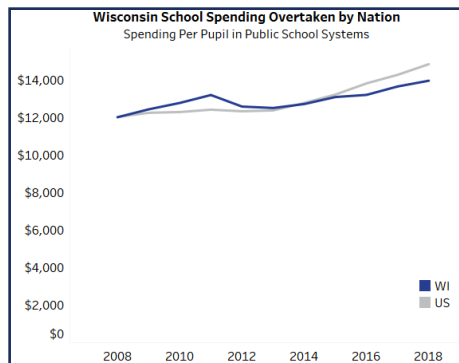


By the Book:

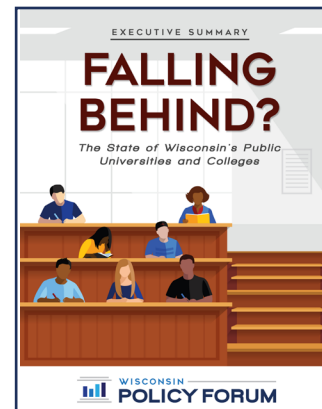
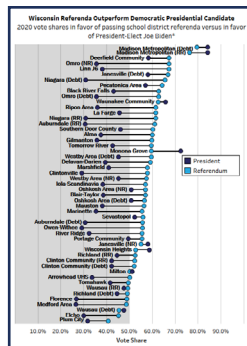
How Wisconsin's libraries are adapting in 2020 and beyond



K-12 Trends Offer Caution as Tough Budget Choices Loom

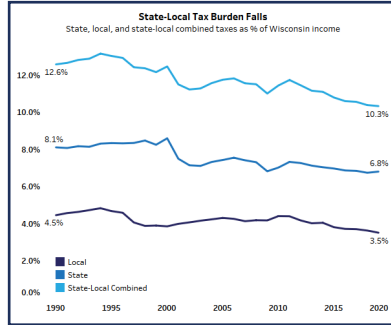


Wisconsin School Referenda Rise above Economy, Politics

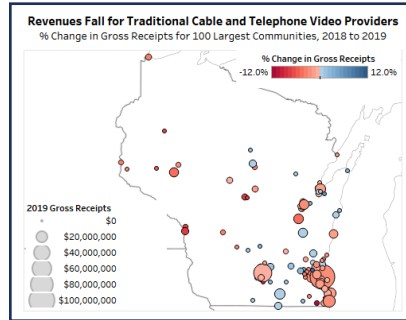


GOVERNMENT FINANCE

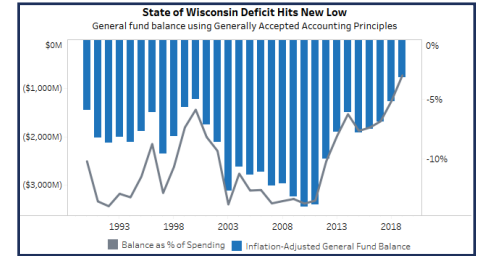
Tax Burden Falls Again



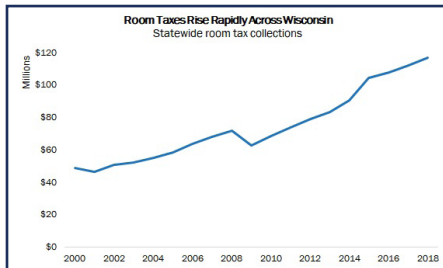
Tuning In To Video Fees



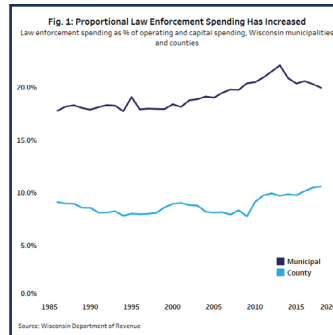
Could State Close the GAP?



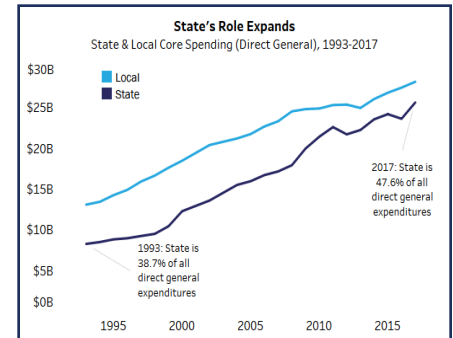
Rise in Online Home Rentals Creates Taxing Dilemma



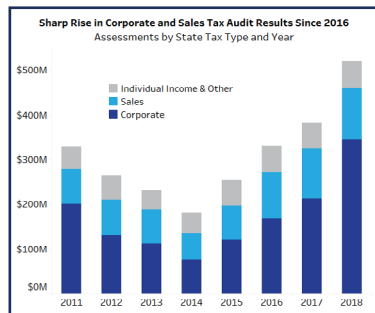
A High-Level Look at Police Funding Trends in Wisconsin



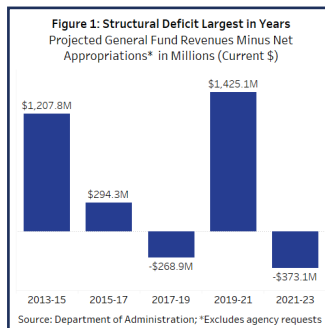
State's Share of Public Spending Rises



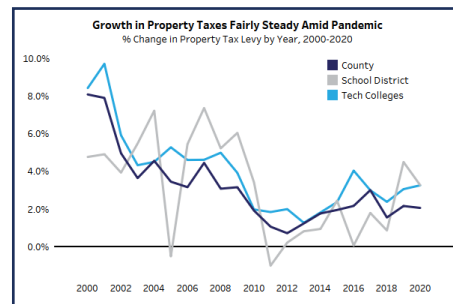
State Increases Auditors - And Corporate Collections



State's Budget Challenges Come into Focus

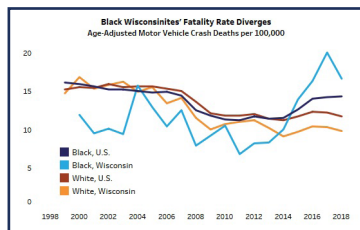


School Tax Levies Rise But Pace Slows

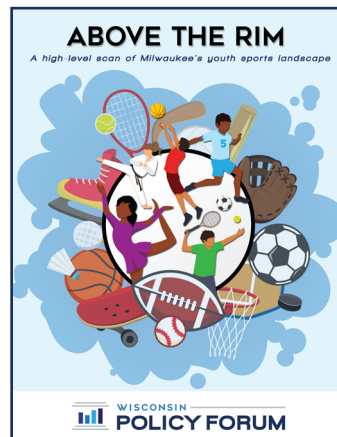
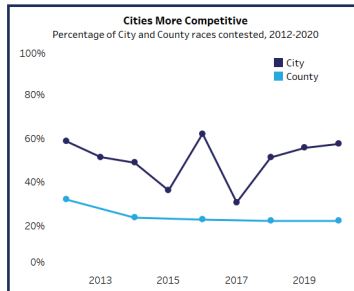


OTHER REPORTS

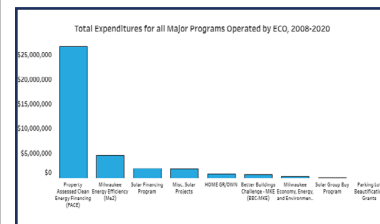
Wrong Way:



No Contest: Local Spring Elections Feature Few Choices for Wisconsin Voters

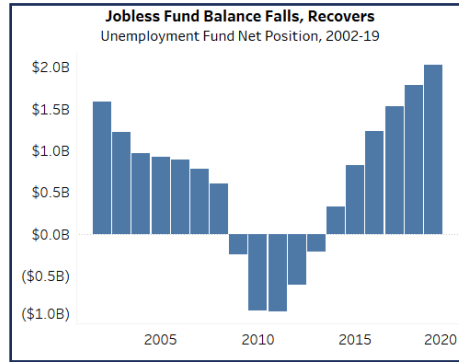


Local Government's Role in Milwaukee's Environmental Sustainability

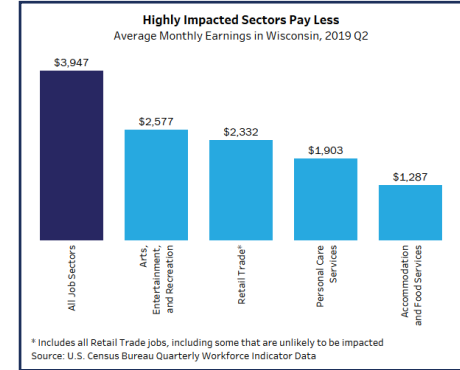


COVID-19

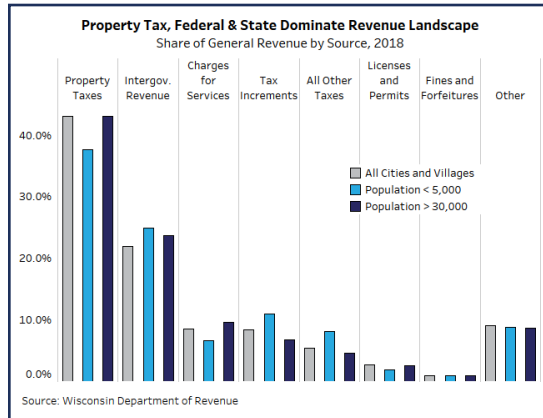
Ready for
Recession?
Recent financial gains
will help but may not
be enough



COVID-19's
Impact on Jobs
in Wisconsin



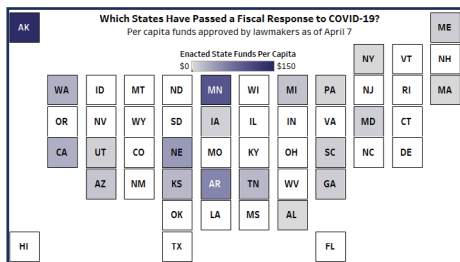
The COVID-19 Fiscal Fall-Out for Cities and Villages



“Really have appreciated reading and then hearing the supportive echo through the media about your report on the arts and culture existential crisis.”

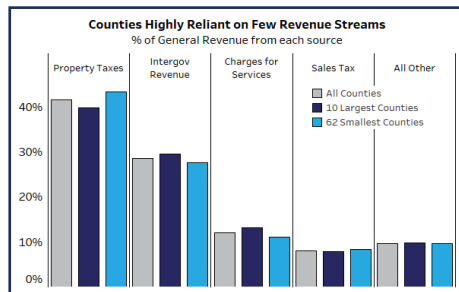
GEORGE TZOUGROS

Executive Director of Wisconsin Arts Board

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Counties Highly Reliant on Few Revenue Streams
 % of General Revenue from each source

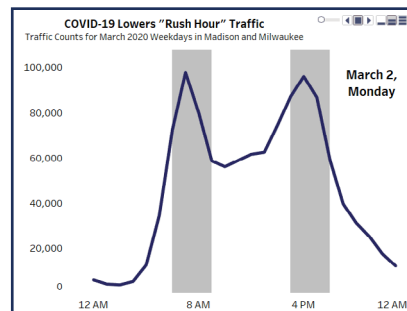
Revenue Source	All Counties	10 Largest Counties	62 Smallest Counties
Property Taxes	42%	40%	44%
Intergov Revenue	29%	30%	28%
Charges for Services	12%	14%	11%
Sales Tax	8%	8%	9%
All Other	10%	10%	10%



COVID-19 Lowers "Rush Hour" Traffic

Traffic Counts for March 2020 Weekdays in Madison and Milwaukee

March 2, Monday



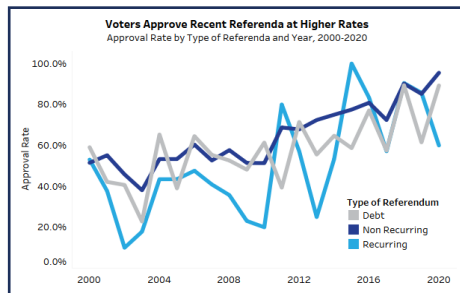
Voters Approve Recent Referenda at Higher Rates
Approval Rate by Type of Referenda and Year, 2000-2020

The chart displays the approval rates for three types of referenda from 2000 to 2020. The Y-axis represents the approval rate as a percentage, ranging from 0.0% to 100.0% in 20% increments. The X-axis represents the year, with labels every four years (2000, 2004, 2008, 2012, 2016, 2020). The legend identifies three series: Debt (grey line), Non Recurring (dark blue line), and Recurring (light blue line).

Key observations from the chart include:

- Non Recurring Referenda:** Consistently show the highest approval rates, starting around 50% in 2000 and rising to nearly 95% by 2020.
- Debt Referenda:** Show moderate approval rates, fluctuating between approximately 40% and 65% throughout the period.
- Recurring Referenda:** Generally show the lowest approval rates, starting around 50% in 2000 and ending around 60% in 2020, though they show a significant peak around 2015.
- Trends:** All three types of referenda show an overall upward trend in approval rates over the 20-year period.

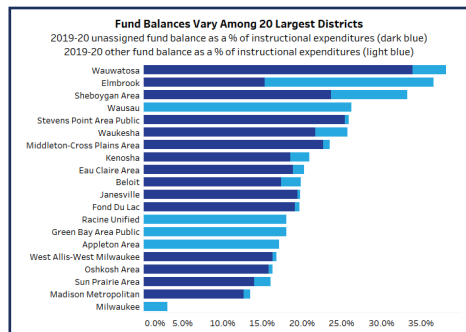
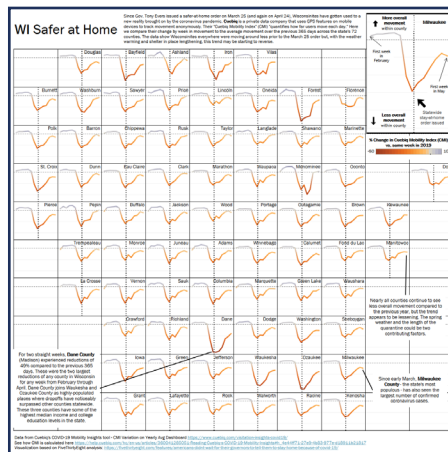
Year	Debt (%)	Non Recurring (%)	Recurring (%)
2000	55	50	50
2001	55	55	40
2002	40	55	30
2003	25	40	10
2004	60	50	15
2005	40	55	45
2006	65	60	55
2007	55	55	45
2008	50	55	40
2009	45	50	35
2010	45	50	25
2011	60	60	20
2012	40	65	25
2013	70	65	45
2014	60	70	55
2015	65	75	100
2016	55	70	75
2017	90	85	85
2018	90	90	80
2019	60	95	60
2020	75	95	60



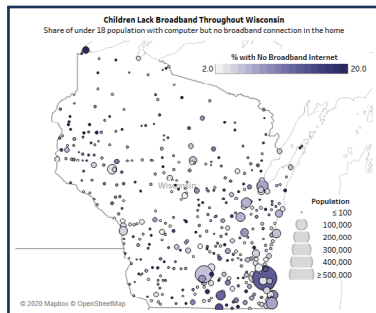
Fund Balances Vary Among 20 Largest Districts

2019-20 unassigned fund balance as a % of instructional expenditures (dark blue)
2019-20 other fund balance as a % of instructional expenditures (light blue)

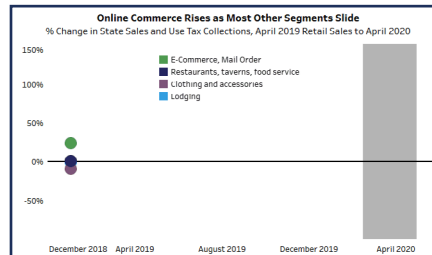
District	2019-20 unassigned fund balance as a % of instructional expenditures (dark blue)	2019-20 other fund balance as a % of instructional expenditures (light blue)
Wauwatosa	~34.0%	~34.0%
Elmwood	~18.0%	~33.0%
Sheboygan Area	~24.0%	~32.0%
Wausau	~24.0%	~28.0%
Stevens Point Area Public	~24.0%	~27.0%
Waukesha	~23.0%	~26.0%
Middleton-Cross Plains Area	~22.0%	~25.0%
Kenosha	~21.0%	~24.0%
Eau Claire Area	~20.0%	~23.0%
Beloit	~19.0%	~22.0%
Janesville	~19.0%	~21.0%
Fond Du Lac	~19.0%	~20.0%
Green Unified	~18.0%	~19.0%
Racine Unified	~18.0%	~18.0%
Appleton Area	~17.0%	~17.0%
West Allis-West Milwaukee	~16.0%	~16.0%
Oshkosh Area	~15.0%	~15.0%
Sun Prairie Area	~14.0%	~14.0%
Madison Metropolitan	~13.0%	~13.0%
Milwaukee	~12.0%	~12.0%

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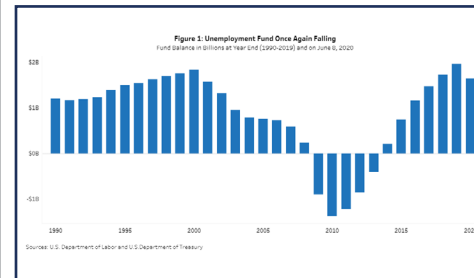
Wisconsin's Digital Divide and its Impacts on Learning



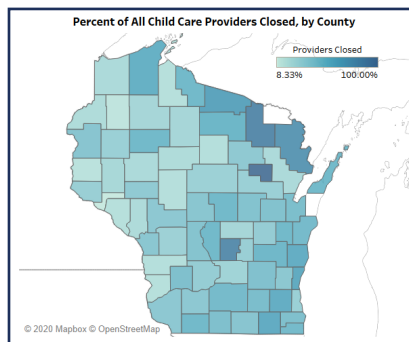
The Online Effect: Shift to Internet Retailers Benefits Income Taxpayers Not Budget



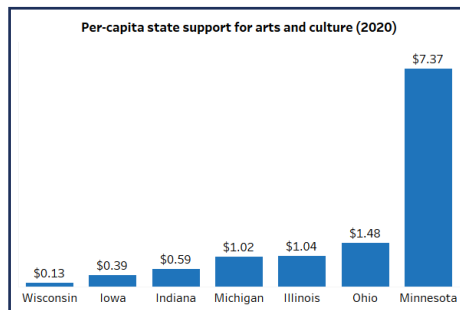
Jobless Claims Tax State, But Not Yet Employers



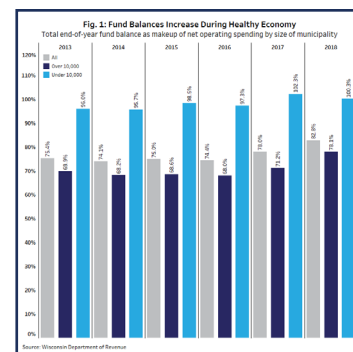
Wisconsin's Child Care Sector Needs Care Itself



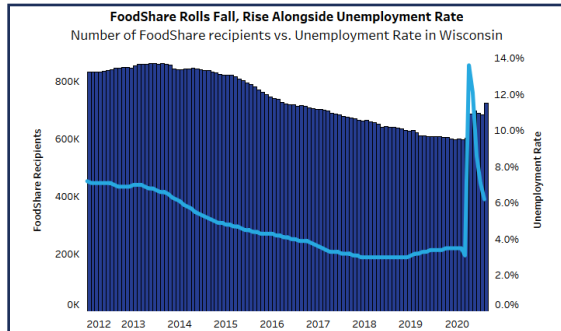
Arts and Culture in a Pandemic: An existential threat



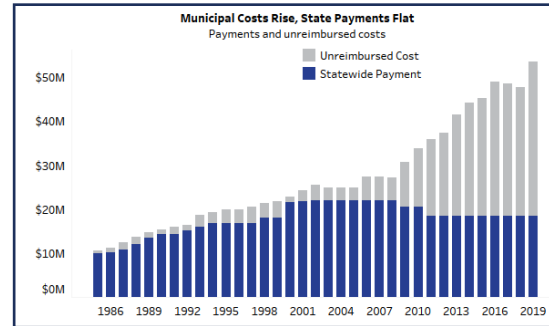
Healthier City Reserves Could Cushion the Blow of COVID-19



Rise in Foodshare Another Indicator of Pandemic's Toll



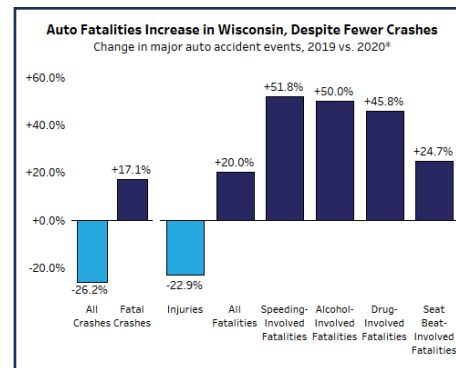
Serving State Facilities: A look at how cities are reimbursed



“Your timely information during the COVID-19 crisis has been outstanding! Thank you!”

TERRI PHILLIPS
Southeastern Wisconsin
Schools Alliance

Alcohol, Speeding Deaths Fuel Increase in Crash Fatalities





Our 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 objectively frame the key issues and decisions that are at the heart of the budget. In 2020, we expanded our portfolio to include the Madison Metropolitan School District.

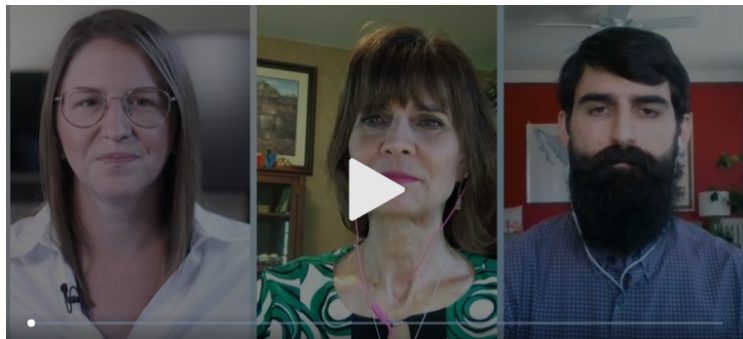


Our collection of DataTools bolsters the Forum's role as a go-to source for understanding local and state government policy and workforce issues in Wisconsin. Our Municipal DataTool includes data on all 601 cities and villages in the state, while our Property Values and Taxes DataTool shows how property values change from year to year in municipalities and counties across the state and how those changes are impacting the taxes levied by local units of government. Our School DataTool compiles academic performance and financial data for Wisconsin public school districts and allows users to run their own comparative reports.





The Forum is widely respected by government and school district leaders for our objectivity and expertise, and we are often called upon to facilitate collaboration discussions among different government entities or to analyze opportunities for service sharing and consolidation. In 2020, we produced four service sharing reports covering communities and governments in Jefferson, La Crosse, and Milwaukee counties. We also continued our prominent role as a research arm for the Johnson Foundation at Wingspread's Resilient Communities initiative in Greater Racine, which seeks to promote greater collaboration among municipal leaders in that region.



Senior researcher Joe Peterangelo is interviewed by PBS Wisconsin for the Arts and Culture report.



Research Director Jason Stein is interviewed by WKOW-TV Madison for the *Falling Behind* report.

Connecting our work with the broadest possible audience – which we do through the news media and social media – maximizes our impact and furthers our goal of anchoring state policy deliberations in impartial facts and data. In 2020 our research was cited nearly 350 times in local, state and national news outlets, and news media routinely sought out Forum researchers as expert sources. Our social media accounts combined had more than 5,100 followers at the end of 2020.



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.



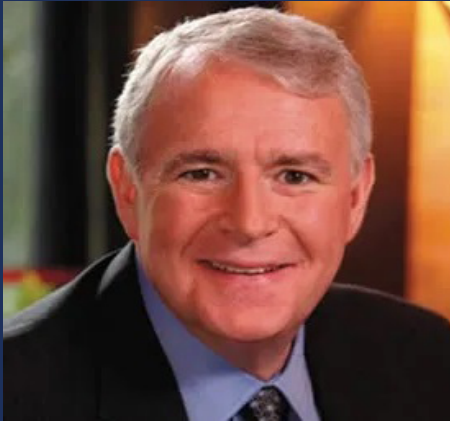
We connect our members with individuals in government, academia, and elsewhere to obtain policy information and analysis that is critical to their work.

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.

More than 200 people attended our 2020 annual meeting on January 21. Our program featured a Milwaukee County Executive candidate debate that was moderated by Forum President Rob Henken. We also highlighted our 2019 organizational accomplishments, previewed 2020 research topics, and highlighted key points in our newly unveiled strategic plan. We formally swore in our officers, new directors, and directors renewing their board terms.



Like many spring 2020 in-person events, our City of Milwaukee Mayoral Debate moved online and was held on March 30. Forum President Rob Henken conducted back-to-back 30-minute live discussions with Milwaukee Mayor Tom Barrett and State Senator Lena Taylor and challenged the candidates to address the critical issues facing the city.



FORUM FRIDAY

When the pandemic hit and it became clear that our in-person events would be suspended for the foreseeable future, we developed a new virtual webinar series, Forum Friday, which featured discussions by public policy leaders on a recently released Forum report or a timely policy issue. While these virtual events will never replace our in-person events, they are a great way to keep Wisconsinites informed and connected on our state's most pressing public policy issues.

K12 Digital Divide & School Finance

Senior Education Researcher Anne Chapman and President Rob Henken discussed key findings from our research on K-12 schools. These included: how the COVID-19 crisis could affect school finances; 2021 Milwaukee and Madison school district budgets; and, how the pandemic could worsen the state's digital divide for students. Alan Borsuk, senior fellow at Marquette Law School, longtime Milwaukee Journal Sentinel reporter and columnist and noted Milwaukee-area education expert, joined the discussion.

PANELISTS:

Alan Borsuk, *Senior Fellow at Marquette Law School and Milwaukee Journal Sentinel columnist*

Rob Henken, *President, Wisconsin Policy Forum*

Anne Chapman, *Senior Researcher, Wisconsin Policy Forum*



FORUM FRIDAY

Investigating Police Budgets

President Rob Henken discussed our recent report on statewide police spending trends and our analyses of police budgets in Milwaukee. City of Milwaukee Alderman Michael Murphy, who chairs the city's Finance and Personnel Committee, shared his thoughts on the outlook for the Milwaukee Police Department's 2021 budget. We asked Reggie Moore, director of Milwaukee's Office of Violence Prevention, to speak to his office's activities and where additional investments ideally would be made to address societal factors that contribute to crime and reduce economic opportunity.

PANELISTS:

Reggie Moore, *Director, Office of Violence Prevention, City of Milwaukee*

Michael Murphy, *Alderman, City of Milwaukee*

Rob Henken, *President, Wisconsin Policy Forum*



The COVID-19 Child Care Conundrum

Researcher Betsy Mueller discussed our report on how the COVID-19 pandemic upended Wisconsin's child care sector, creating huge challenges for children and families seeking high-quality care and for businesses seeking to reopen. Wisconsin Department of Children and Families Secretary Emilie Amundson gave her take on the severity of the challenge and possible public sector responses, while Metropolitan Milwaukee Association of Commerce President Tim Sheehy shared his thoughts on what's at stake for businesses and whether policymakers need to intervene.

PANELISTS:

Emilie Amundson, *Secretary, Wisconsin Department of Children and Families*

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

Betsy Mueller, *Researcher, Wisconsin Policy Forum*



FORUM FRIDAY

Is Southeast Wisconsin Ready to Confront its Affordable Housing Challenges?

Senior Researcher Joe Peterangelo discussed our report on the city of Milwaukee's affordable housing efforts. Milwaukee Journal Sentinel Ideas Lab reporter James Causey discussed his reporting on metro Milwaukee's troubled history with this issue; and Racine County Executive Jonathan Delagrave explained his county's efforts to address this challenge, including its efforts to expand housing options to accommodate new economic growth.

PANELISTS:

James Causey, *Ideas Lab reporter, Milwaukee Journal Sentinel*

Jonathan Delagrave, *County Executive, Racine County*

Joe Peterangelo, *Senior Researcher, Wisconsin Policy Forum*



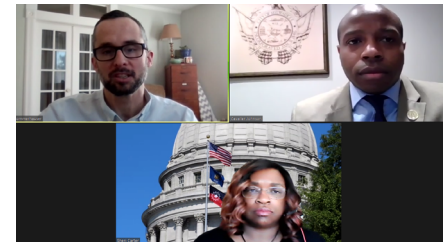
Budgets in a Pandemic: The Bottom Line for Madison and Milwaukee

President Rob Henken and Research Director Jason Stein discussed our city of Milwaukee and city of Madison budget briefs. Madison Common Council President Sheri Carter and Milwaukee Common Council President Cavalier Johnson shared their thoughts and insights on their respective cities' 2021 budgets and overall fiscal conditions.

PANELISTS:

Sheri Carter, *President, Madison Common Council*

Cavalier Johnson, *President, Milwaukee Common Council*



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. Attendees from across the state tuned in to our virtual Salute to Local Government to join us in celebrating excellence in government and to hear from our keynote speaker, Milwaukee County Executive David Crowley. While the pandemic required that we reimagine this year's awards program, it did not stop us from recognizing all of our local governments, school districts, and individual public sector employees who have gone the extra mile and sacrificed for the common good in 2020.



JEAN B. TYLER LEADER OF THE FUTURE AWARD

Abby Attoun

*Director of Planning and Community Development,
City of Middleton*



JAMES R. RYAN LIFETIME ACHIEVEMENT AWARD

Dianne Robertson

*Retired Administrator/Clerk/Treasurer, Village
of Thiensville*



NORMAN N. GILL AWARD FOR INDIVIDUAL EXCELLENCE

Dale Peters

City Manager, City of Eau Claire

SALUTE TO LOCAL GOVERNMENT



INNOVATIVE APPROACH TO PROBLEM SOLVING

Public Safety Department | *Village of Palmyra*



INNOVATIVE USE OF DATA AND TECHNOLOGY

Park Place Performs | *City of Janesville*



INTERGOVERNMENTAL COOPERATION

Barton School Apartments | *Washington County*

Honorable Mention: Milwaukee County Unified Emergency Operations Center | *Milwaukee County and its 19 municipalities*

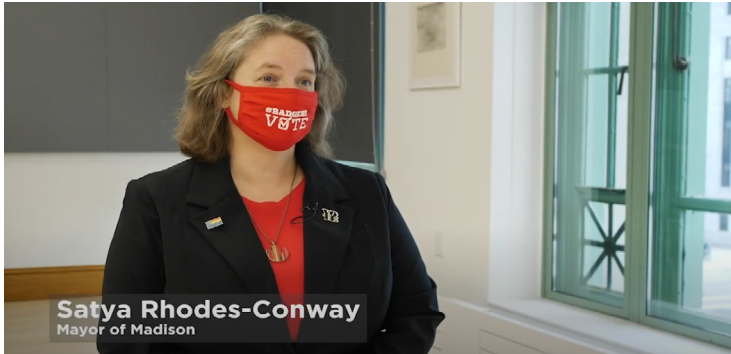


PUBLIC-PRIVATE COOPERATION

Milwaukee Employment Renovation/Renovation Initiative | *City of Milwaukee Department of City Development & Wisconsin Department of Financial Institutions*

SALUTE TO LOCAL GOVERNMENT

In 2020, we added two award categories to highlight the unprecedented pandemic-related challenges facing local governments and school districts across the state. Our “Effective Response to COVID-19 Challenge” award recognized an innovative and effective response by a government or school district to a challenge created by the pandemic, while our “Excellence Under Pressure” award honored a non-elected government or school district employee for exceptional pandemic-related work.



Effective Response to COVID-19

Public Health & City Clerk's Office | *City of Madison*

Honorable Mention: NR Strong | *City of New Richmond*



Excellence Under Pressure

TJ McCray | *Director of Instructional and Library Media Services, Madison Metropolitan School District*

TankThink produced this year's video vignettes of our winners and the virtual event. TankThink is a media production company dedicated to strengthening cultural ecosystems by creating meaningful media to push the greater good forward.



Rob Henken
President

Jason Stein
Research Director

Therese Schneider
Development & Operations Director

Mark Sommerhauser
Communications Director/Policy Researcher



Jeffrey Schmidt
Data & Technology Director

Anne Chapman
Senior Researcher

Joe Peterangelo
Senior Researcher

Ashley Fisher
Fiscal Researcher



Ari Brown
Data & Research Analyst

Betsy Mueller
Researcher

Alyssa Doman
Administrative & Membership Assistant

Davida Amenta
Researcher

Report design credits: Ragusin Design; Alyssa Doman Photo credits: Landre Photography

Not pictured:

Matt Tompach: *Researcher*; Mandy Potapenko: *Director, Milwaukee Community Justice Council*;
Erin Perkins: *Project Manager, Milwaukee Community Justice Council*;
Muhammad Shayan: *Research Intern*

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.



2019-2020
Todd A. Berry Fellow
Chalisa Sims



2019-2020
Norman N. Gill Fellow
Joe Krivichi



2020-2021
Todd A. Berry Fellow
Maddie Hahn



2020-2021
Norman N. Gill Fellow
Angela Thai

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.

FINANCES

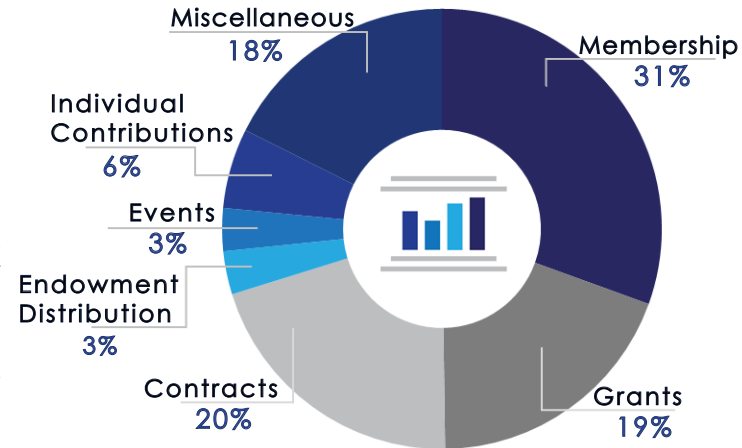
The Wisconsin Policy Forum's financial condition remains strong, despite a global pandemic that has wreaked havoc on our economy. The financial resiliency we demonstrated in 2020 stems from the generosity of our members and supporters; the creativity and hard work of our staff; and, perhaps most of all, the importance of our mission.

Our ability to absorb some temporary financial hits also reflects the importance of the merger we implemented three years ago between the former Public Policy Forum and the Wisconsin Taxpayers Alliance. Our reserves remain robust and provide reassurance and stability during a year like 2020 when some key revenue streams -- like membership and event income -- were threatened.

Overall, our unaudited results show we ran a small operating deficit in 2020, with about \$1.37 million in unaudited operating revenue and \$1.39 million in unaudited operating expenditures. However, that deficit was more than erased with \$580,000 of investment earnings. Key to our 2020 financial performance was a nearly \$200,000 PPP loan we received from the Small Business Administration, which was forgiven in its entirety.

The budget is overseen by the Forum's Finance and Executive Committees, which receive frequent and periodic reports. Unaudited totals show that in 2020, just over 39% 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 31% of operating revenue came from membership dues, which support discretionary research projects and activities deemed important by the staff and directors.

We are pleased to report that we were able to surpass our revenue targets for grants and contracts. We also exceeded our goal for individual contributions, with our Chairman's Club generating nearly \$70,000 in discretionary revenue. Revenue from membership renewals was down about 15% from the amount budgeted, but after lagging in the early months of the pandemic it recovered substantially later in the year.



CHAIRMAN'S CLUB

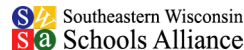
The Chairman's Club was established in 2016 to help build financial capacity to support the Forum's core mission and enhance its communications. These generous supporters receive complimentary admission to all Forum events and are invited to private receptions at great venues featuring prominent speakers.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

Jennifer Abele
Ian Abston
James Barry
Grady Crosby
Eileen & Howard
Dubner
Katherine Gehl
Nick Fallucca
Moira Fitzgerald
Katherine Gehl
Veronica Gunn
Michael Harrigan
Art Harrington
Michael Harrigan
Susan Hatch

Katie Heil
Kristine Hinrichs
Ben Juarez
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
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Michael Weiss
Joe Wilson
Fred Young

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 West Bend Mutual Insurance
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 City of Platteville
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 City of Tomahawk
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 City of Wauwatosa
 City of West Allis
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 Fond du Lac County
 Jefferson County

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 of Commerce
 La Crosse County
 Marathon County
 Milwaukee County
 Milwaukee Metropolitan
 Sewerage District
 Racine County
 Town of Clayton
 Town of Hudson
 Trempealeau County
 Village of Bayside
 Village of Bristol
 Village of Brown Deer
 Village of Germantown
 Village of Greendale
 Village of Hales Corners
 Village of Hartland
 Village of McFarland
 Village of Mount Pleasant
 Village of Pleasant Prairie
 Village of Shorewood
 Village of Sussex
 Village of Thiensville
 Village of Whitefish Bay
 Walworth County
 Washington County
 Waukesha County

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Greendale School District
Hamilton School District
Hayward Community School District
Howard-Suamico School District
Marquette University
Medical College of Wisconsin
Mequon-Thiensville School District
Merrill Area School District
Milwaukee Area Technical College
Milwaukee Public Schools
Milwaukee School of Engineering
Monroe School District
Mount Mary University
Mukwonago School District
Oconomowoc Area School District
Port Washington-Saukville Schools
School District of Brown Deer
School District of Janesville
School District of Menomonee Falls
School District of New Berlin
School District of Rhinelander

University of Wisconsin-Milwaukee
Waukesha County Technical College
Watertown Unified School District
Wautoma Area School District
West Salem School District
Wisconsin Rapids Public
School District

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Children's Health Alliance
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Children's Wisconsin
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Community Care, Inc.
Cooperative Network

Dairyland Power
Daniel Hoan Foundation
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Froedtert Health
Gathering Waters Inc.
George Kress Foundation, Inc.
Goodwill Industries of
Southeastern Wisconsin
Greater Milwaukee Committee
Greater Milwaukee Foundation
Harbor District, Inc.
Heil Family Foundation
Herb Kohl Philanthropies
Herzfeld Foundation
iCare Independent Health Care Plan
IMPACT
International Brotherhood of
Electrical Workers Local 494
Jewish Family Services
Johnson Foundation at Wingspread
Judd S Alexander Foundation, Inc.
Kikkoman Foods Foundation, Inc.
League of Wisconsin Municipalities
Local Initiatives Support Corp.
Lutheran Social Services of Wisconsin
Marcus Center for the
Performing Arts

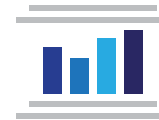
Medical Society of Milwaukee County
Menomonee Valley Partners, Inc
Metropolitan Milwaukee Association
of Commerce
Midwest Food Processors Association
Milwaukee Downtown, Bid #21
Milwaukee Film, Inc.
Milwaukee Public Library
Milwaukee Public Museum
Milwaukee Regional Medical Center
Milwaukee Teacher Education Center
Milwaukee Tech Hub Coalition
Milwaukee Urban League
NAIOP, the Commercial Real
Estate Development Association
Northwest Side Community
Development Corporation
Penfield Children's Center, Inc.
Rogers Behavioral Health
Rotary Club of Milwaukee
Safe & Sound Inc.
School Choice Wisconsin
Southeastern Wisconsin
School Alliance
St. Charles Youth & Family
Services Inc.

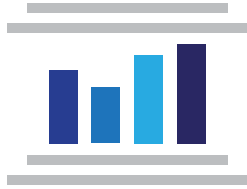
United Way of Greater Milwaukee
& Waukesha County
VISIT Milwaukee
Vivent Health
Weiss Family Foundation
Wisconsin Association of Mutual
Insurance Companies
Wisconsin Association of School
Boards
Wisconsin Association of School
District Administrators
Wisconsin Bankers Association
Wisconsin Center for Manufacturing
& Productivity
Wisconsin Counties Association
Wisconsin Hospital Association
Wisconsin Institute of CPAs
Wisconsin Insurance Alliance
Wisconsin Medical Society
Wisconsin Realtors Association
Wisconsin Restaurant Association
Wisconsin State Telecommunications
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Wisconsin Transportation Builders
Association
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Initiative Corporation
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Zilber Family Foundation
Zoological Society of Milwaukee

*We maintain a diverse array
of financial supporters that is
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and nonprofit sectors.*

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





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