

ANNUAL REPORT

2017

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From Our Leadership

Dear friends,

2017 was a significant year for the Center for Tax and Budget Accountability (CTBA), and this, our first Annual Report, has been created to celebrate that.

Our research team produced 14 reports in 2017, ranging in topic from pensions and housing, to education funding reform. As always, CTBA went beyond the publishing of research and worked to achieve policy reforms based on recommendations identified in our studies. In 2017, that work paid off, as the Evidence Based Model – a school funding formula that not only ties taxpayer investment in students to what the research shows works, but also ensures funding is adequate in amount and equitable in distribution – which CTBA has been championing since 2010, was finally passed into law.

By no means did CTBA accomplish this work alone. Passing historic legislation requires having great partners in the General Assembly, as well as in the stakeholder community.

But no support of CTBA's efforts is more important than yours. CTBA works on structural policy reforms that require playing the long game, as demonstrated by the time it took to gain passage of the Evidence Based Model. And that requires consistent financial support from people like you, who appreciate what CTBA brings to the table.

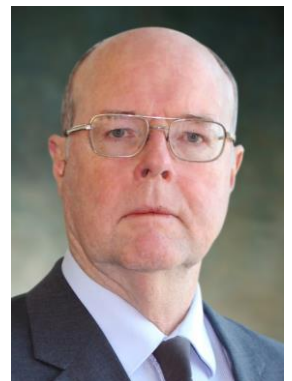
We are very proud of our achievements, and hope you share our pride. Please consider contributing not just because we have realized a significant accomplishment this year, but to help us continue addressing systemic policy reforms in the future.

On behalf of our staff and our Board of Directors, you have our sincerest appreciation as we continue our work on policy reforms which are evidence based, and promote social and economic justice.

Peace,

Ralph Martire
Executive Director

David May
Chair of the Board of Directors



Mission and History

The Center for Tax and Budget Accountability was formed in 2000 as a bipartisan, nonprofit research and advocacy think tank that works across ideological lines to identify evidence-based reforms that promote social and economic justice for everyone. Given how rancorous the current political environment is in our nation, the charge to design policy reform initiatives that are not only evidence-based but also bridge rather than reinforce ideological divides is both prescient and crucial.

To accomplish this mission, CTBA:

- promotes sustainable, long-term policy reforms in the core areas of education, social services, healthcare, and workforce/economic development;
- ties the fiscal side of the ledger to service delivery—after all, to have quality services that meet demographically driven needs and generate desired outcomes, sufficient capacity on the front end is essential; and
- frames all reforms in ways that bridge rather than reinforce ideological divides.

CTBA believes it essential to have the commitment and ability to stay focused on resolving major inequities over the long term, and to work collaboratively with other experts, organizations, and opinion leaders to move a meaningful reform agenda forward. It is critical that work on structural issues be sustained from year to year through collaboration with a broad network of organizations and individuals, otherwise major policy changes will not occur.



“The reasons I work with the CTBA are simple: the organization’s research is always timely, on point, and accurate; the organization vets its analysis to ensure it is credible and evidence based; and the organization is willing to take on difficult, long-term and complex policy issues—like education funding and structural racism—in a manner that resonates with divergent world views.”

Toi Hutchinson
Illinois State Senator, 40th District

By the Numbers

Reports



- Housing (1)
- Budget and Taxes (5)
- Education (7)
- Pensions (1)

In 2017, CTBA produced 14 reports, including our analysis of SB 1947 (Public Act 100-0465), the historic legislation that enacted the Evidence Based Model.

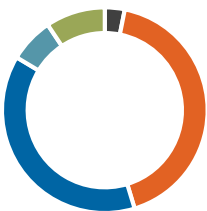
The scope of CTBA's public policy-related research and advocacy includes public education, tax policy, fiscal viability of the social service safety net, housing, structural racism, and economic inequality. Publishing reports is only one method by which CTBA shares research and public policy solutions.



Public

Education

Engagements



- Housing (4)
- Budget and Taxes (54)
- Education (49)
- Pensions (9)
- Other (12)

CTBA staff shared research and public policy solutions by participating in 128 public education events in collaboration with community and other nonprofit organizations, legislators, and the media. CTBA presented on issues for which it had published reports, as well as other topics, including budget comparisons with other states, the Sweetened Beverage Tax, and sanctuary cities, among others.

Also in its role as a technical advisor to both Illinois House and Senate legislators, CTBA testified five times in the House to the State Government Committee and the House Education Task Force, and twice in the Senate to the Senate Executive Committee and the Government Reform Committee.

All of our reports are available online at CTBAOnline.org/reports.

"I have always valued the work of CTBA. Their bipartisan approach offers a unique look at the fiscal issues of the state of Illinois. CTBA's work on the new Evidence Based Model for school funding was paramount and vital to its success. Your continued support will ensure their ability to provide much needed information to legislators, such as myself."

Will Davis

Illinois State Representative, 30th District

2017 Highlights

Organizational Accomplishments

- **The Evidence-Based Model:** CTBA, as technical advisor to Sen. Lightford and Rep. Davis, drafted HB2808, which became SB1, the “Evidence-Based Model” of school funding, which was signed into law on August 31st, 2017. EBM funds those educational practices that have a statistically meaningful correlation to enhancing student achievement over time. It is by design equitable in distribution and adequate in amount, and, if fully funded, will functionally eliminate the structural racism currently embedded in Illinois’ education funding policy.
- **Passage of State Budget:** CTBA worked closely as technical advisor to various legislators in both parties to override the Governor’s veto and attain passage of a General Fund Budget for the first time in three years; as well as various tax policy reforms with raised \$5 billion to stave off cuts to core services, while reducing the tax burden for low- and moderate-income families.
- **Updated Review of Chicago Housing:** Following its 2014 fiscal review of the Chicago Housing Authority, CTBA reexamined its report, and found that while the number of vouchers issued increased, building repair and maintenance, as well as financial transparency, had not improved.

Fiscal Symposium

“The Politics of Revenue: The Future of Education in Illinois”

2017 saw a very successful Fiscal Symposium, celebrating CTBA’s work on education funding reform and the work done by other Illinois leaders.

CTBA honored Terry Mazany, former President and CEO of The Chicago Community Trust, one of the nation’s leading community foundations with assets of more than \$2.5 billion. The Trust partners with donors to distribute over \$150 million annually. CTBA honored Terry for his tireless commitment to education.



The Fiscal Symposium also included a panel of distinguished guests. Panelists for the 2017 Fiscal Symposium included:

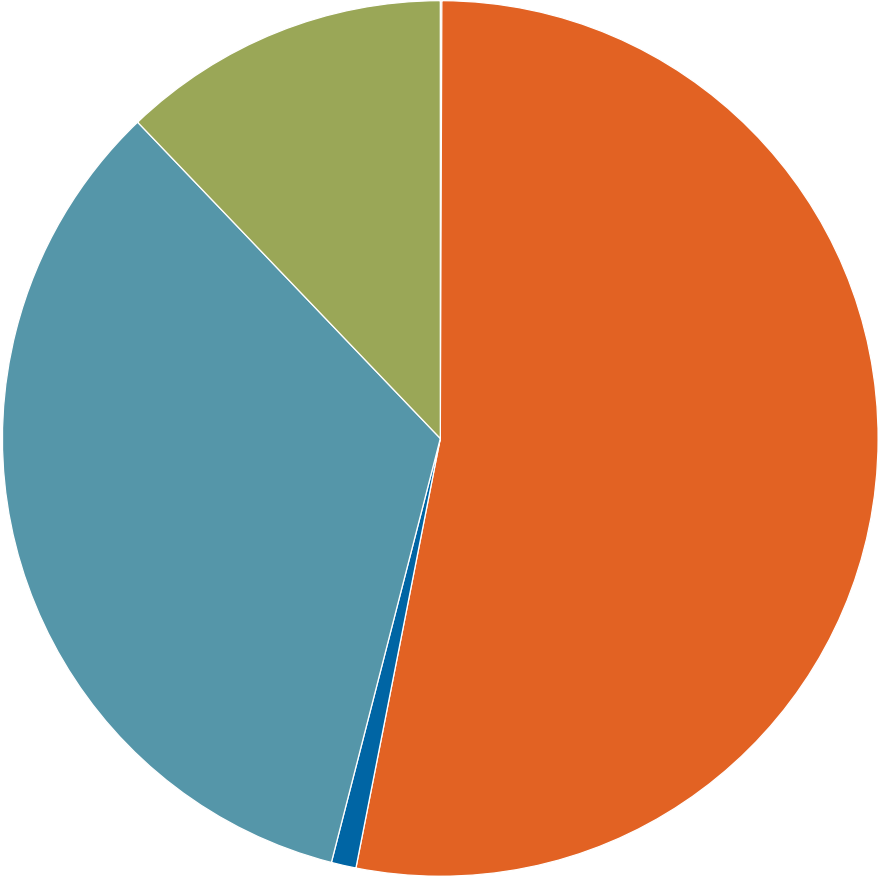
- Honorable William “Will” Davis (D-30), Appropriations Chair, Elementary & Secondary Education
- Dr. Michael A. Jacoby, Executive Director, Illinois Association of School Business Official
- Honorable Kimberly A. Lightford (D-4), Assistant Majority Leader
- Honorable Robert W. Pritchard (R-70), Republican Spokesperson, Approp- Elementary & Secondary Education

“I have continued to work with the Center For Tax and Budget Accountability over the years on everything from education policy to pension funding and tax reform, because I have found that their policy analysis and recommendations are consistently sound, their research is consistently accurate, and they help communicate complex issues in user-friendly formats that appeal to a broad ideological spectrum.”

Kimberly Lightford
Illinois State Senator, 4th District

2017 Financials

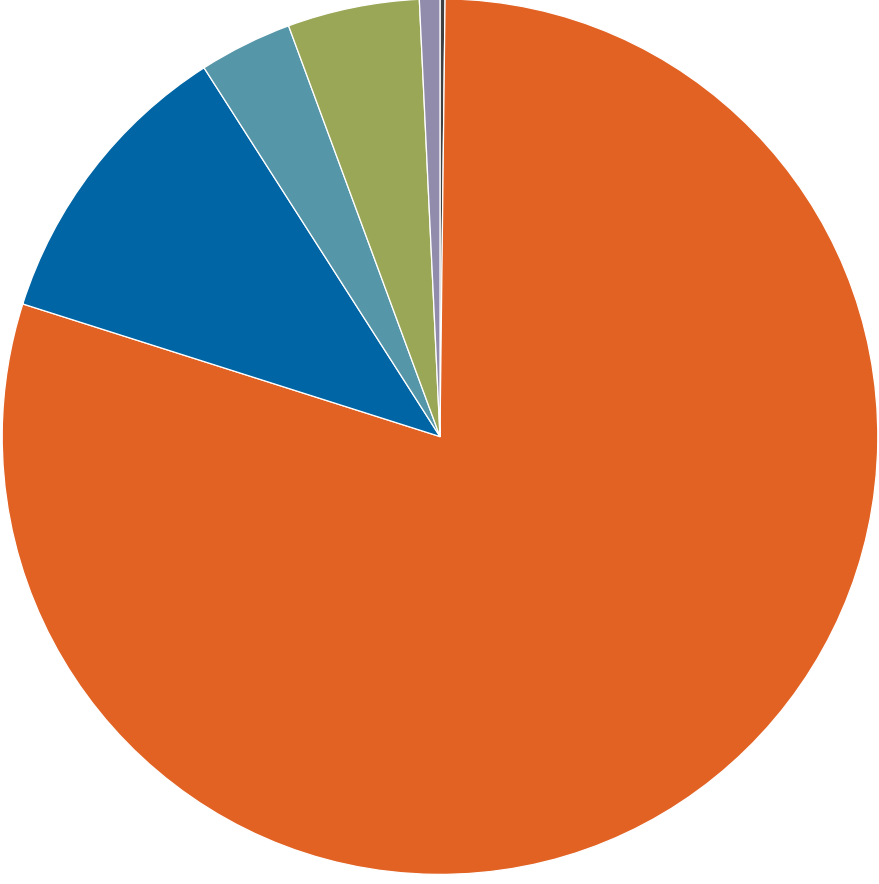
Revenue and Expenses



- Interest Income - \$767
- Contributions and Contracts - \$723,571
- Other Income - \$12,484
- Program Expenses - \$461,800
- Support Services Expenses - \$165,785

2017 Financials

Assets and Liabilities



- Current Liabilities - \$1,738
- Cash - \$749,233
- Certificates of Deposit - \$103,780
- Grants and Other Receivables - \$32,317
- Prepaid Expenses and Other Assets - \$45,753
- Property and Equipment - \$7,076

CTBA Staff and Board of Directors

Staff

Ralph Martire

Executive Director

Tracy Schonberger

Administrative Director

Sydney Smith

Development Director

Daniel Kay Hertz

Research Director

Bobby Otter

Budget Director

Gaby Roman

Research Associate

Board of Directors

David May

Chair of the Board of Directors

Deborah Bandy

Johnson & Johnson Healthcare Systems, Inc.

Robert Bloch

Dowd, Bloch, Bennett, Cervone,
Aurerbach & Yorkich

Les Bond

Attucks Asset Management, LLC

Dr. Byron Brazier

Apostolic Church of God

John Cameron

AFSCME Council 31

Jonathan Jackson

Chicago State University

Honorable Robin Kelly

US House of Representatives, Illinois District 2

Jane Lehmann

Former Elgin Community College Professor

Carlene Lutz

Former Educator in the Chicago Public Schools

Gloria Materre*

Materre & Associates

William McNary

Citizen Action/Illinois

Dan Montgomery

Illinois Federation of Teachers

Kathy Nesburg

League of Women Voters

Jim Reed

Illinois Education Association

Jean Sussman

Village of Riverside

Marleis Trover

McKendree University

Addison Woodward

Former Chairperson of the Division of
Psychology and Counseling at Governor's State
University

2017 Donors

CTBA is grateful to all of its supporters for making 2017 our most successful year to date.

Institutional Donors

Government

City of Chicago Department of Finance

Foundations

Alphawood Foundation
McCormick Foundation
Woods Fund

Unions

AFSCME Illinois
Illinois Education Association
Illinois Federation of Teachers

Organizations and Associations

Illinois Association of School Administrators
Illinois Association of School Business Officials
The Opportunity Institute
RainbowPUSH
State University Annuitants Association
Ullico Inc.

Individual Donors

\$10,000+

David May

\$1,000-\$9,999

Deborah Bandy
Les Bond
Jane Lehmann
Gloria Materre
Jason Leahy
Carlene Lutz
Jean Sussman
Marleis Trover
Addison Woodward

\$500-\$999

Jeffrey May
Grace Powers
Jeff and Jackie Seeman
Jane Wells

\$100 - \$499

Alba Alexander
Justin Attaway
Harry Berman
Marguerite Bloch
Dorceen Boyle
Michael Bradley
Nancy Brandt
Ginni Burghardt
Kristin Carlson Vogen
Mary Carroll
Jose Cerda
Gregg Chadwick
Margaret Clauson
Christina Collins
Edward Condon
Elizabeth Conran

\$100-\$499 cont'd

Ellen Correll
John Correll
Ann Courter
John & Bonnie Cox
Peter Creticos
David Curtis
William Davis
Sara Dixon Spivy
Steve Duesterhaus
James Fritts
Honorable Robyn Gabel
Franklin & Frances Gamwell
Barbara Germany
Patricia Jones
Ann Gillespie
Ralph Grimm
Katie Gruber
Beverly Guzy
Anne Hallett
Susan Harkin
Fred Heid
Cynthia Heidorn
Eric Hiatt
Juanita Jordan
Honrabble Robin Kelly
Linda Kolbusz-Kosan
Kelsie Landers
Troy LaRaviere
Paula Lawson
Donna Leak
Robert LeMaire
Dick Lockhart
Daniel Maki
Jawanza Malone
Michelle Mangan

"CTBA's positions on issues are loaded with data and easily-understood conclusions. We need a bipartisan organization to keep us informed. That is why I support and turn to CTBA."

Beverly Guzy
CTBA Donor

Donors, continued

“Advocacy work to support quality public education is important work. It is essential to have thoughtful and accurate data and persuasive arguments to make the case, as well as fierce and relentless partners to accomplish our shared objectives. Ralph and the CTBA Team have provided critical support and data for many years. We are grateful for their efforts.”

Roger L. Eddy
Executive Director, Illinois Association of School Boards

\$100-\$499 cont'd

Matrice Manuel
Mary Kay Martire
David Marzahl
Ben Matthews
Claire McIntyre
Diane McNeilly
Sherry Medwin
Ronald Messina
Mark Michaels
Vicki Mogil
Alberto Morales
Alan & Kathy Nesburg
Edward Noyes
Sandra & John O'Donnell
Kay & Bob Otter
Sheena Patton
Gail & Al Popowits
Dave Rathke
Mary Richie
Pam Rumancik
Brenda Russell
Steven Rust
Kathryn & Daniel Ryan
Zachary Schiffman
Molly Shellhorn
Sarah Slaughter
Robert Spatz
Conrad Spirrisson
Marjorie & John Sucansky
Chris Sullens
Karen Sullivan
Robert J. Sypniewski
Brandon Thorne
Caryn Valadez
Alan Voelker
Anita Weinberg
Margaret & Mike Wierzbicki
Stacey Williams
Steven Wroblewski
Tom & Linda Youngren
Arlene Zielke

\$1-\$99

Patricia Anderson
Robert Bacon
Barbara Baily
Linda & Randy Balla
Arthur Biladeau
Bruce Bohrer
Glen Brown
Ronald Detmer
John Dillon
Susan Druffel
Mark Fredisdorf
John & Julia Haley
Robert Hanson
W. Houston
Gretchen McDowell
Darlene McNamara
Dean Mouloupoulos
Kevin Nesburg
Peter Pasero
Robert Ralston
Peter Rankaitis
Andrew Rowlas
Dianne Schmidt
Stephen Schnorf
Richard Schouten
Thomas & Janet Szot
Sylvia Tillman
Margo Turner
Peter Tyor
Lee Vogel
Matthew Wdowiarz
Dennis Wilson
Josie Yanguas

CTBA

Center For Tax and
Budget Accountability

Social and economic justice through data-driven policy.

“Over my 15 years in the legislature, I have come to respect and rely upon the work of the Center for Tax and Budget Accountability. In the politically-charged atmosphere of Springfield, legislators are skeptical of think tanks, especially when they present “research” that challenges the customary thinking and has fiscal consequences.

“Through the work of the Center for Tax and Budget Accountability on issues ranging from pension reform to adequate and equitable school funding, the public discussion has taken a broader, more creative, and longer-view direction. It is critically important for legislators and citizens to have access to credible, peer-reviewed research on public issues and to engage in a dialogue about its application.”

Robert Pritchard
Illinois State Representative, 70th District

Please visit us at www.CTBAOnline.org to
make a donation and to sign up for our newsletter.

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