

CTBA | Center For Tax and
Budget Accountability

Social and economic justice through data-driven policy.

**ANNUAL
REPORT
2018**

Contents

From Our Leadership.....	1
By the Numbers.....	2
2018 Highlights.....	3
Staff.....	4
Financials – Revenue and Expenses.....	5
Financials – Assets and Liabilities.....	6
Staff and Board of Directors.....	7
2018 Donors.....	8
Donors cont'd.....	9

From Our Leadership

Dear friends,

The Center for Tax and Budget Accountability, its Board of Directors, and its staff are very pleased to share our 2018 Annual Report. CTBA believes that its greatest successes are still ahead, and we are excited to show you the progress we've made.

We hope you enjoy hearing about our accomplishments in 2018, and that you consider contributing financially to CTBA. Your continued support ensures that CTBA can continue promoting equitable policies throughout Illinois and the nation.

Peace,

Ralph Martire
Executive Director

David May
Chair of the Board of Directors



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.

By the Numbers

2018 Reports



■ Progressive Tax (1)

■ Budget and Taxes (2)

■ Education (2)

■ Pensions (2)

In 2018, CTBA produced 7 reports which demonstrate the integrated and strategic approach we take to create meaningful systems change. For example, in FY2018, landmark public school funding legislation, the Evidence Based Funding Formula (EBF), which CTBA co-drafted as technical advisor and worked on for over seven years, was passed into law. And while getting that law passed was a significant success, to be transformational the EBF must be fully funded. But that's not possible given the state's current tax resources and the unrealistic, unaffordable, back-loaded plan for repaying Illinois' multi-billion-dollar unfunded pension liability. Which is why CTBA continues to work on reamortizing the pension debt and modernizing Illinois' tax code – reforms which CTBA has advocated for years.

Additionally, in 2018 CTBA's research team produced 15 blog posts to the CTBA Budget Blog. Our blog provides timely, user-friendly analysis of policy developments that supplement our work.

To read our reports, please visit CTBAonline.org

To read the BudgetBlog, please visit BudgetBlog.CTBAonline.org

2018 Highlights

Organizational Accomplishments

Graduated-Rate Income Tax: In 2018, one crucial seed for modernizing Illinois' tax code equitably and sustainably was sown: passage of a Resolution to amend Illinois' constitution to permit a graduated-rate structure for the state's income tax, something that CTBA has worked on for nearly two decades. It is now up to CTBA and our constituents to continue supporting the graduated rate income tax through next November, when it is up for ratification by voters in the 2020 General Election.

Professional Review Panel: CTBA Executive Director Ralph Martire was appointed to the Illinois State Board of Education Professional Review Panel. The PRP oversees the implementation of the Evidence Based Formula for K-12 public school funding. CTA's research helped inform various recommendations made by the panel to support best-practice implementation of the Evidence Based Formula across the state.

2018 Fiscal Symposium



CTBA's 2018 Fiscal Symposium, *The Fiscal Future of Illinois*, held Wednesday, October 10, 2018 was a huge success. CTBA plays an important and unique role by tying fiscal policy to advancing other, substantive public policy initiatives which are grounded in best practices, are evidence-based, and promote social and economic justice, both in Illinois and nationally.

We are extremely grateful to our Keynote Speaker, Illinois Comptroller Susana A. Mendoza; Moderator, Craig Dellimore, Political Editor of WBBM NewsRadio 780 AM and 10.59 FM; and our panelists, Representative David Harris (R-53), Representative Stephanie Kifowit (D-84) and Representative Fred Crespo (D-44).

Staff



Ralph Martire
Executive Director



Tracy Schonberger
Administrative Director



Drazzel Feliu
Research Director



Allison Flanagan
Research Associate



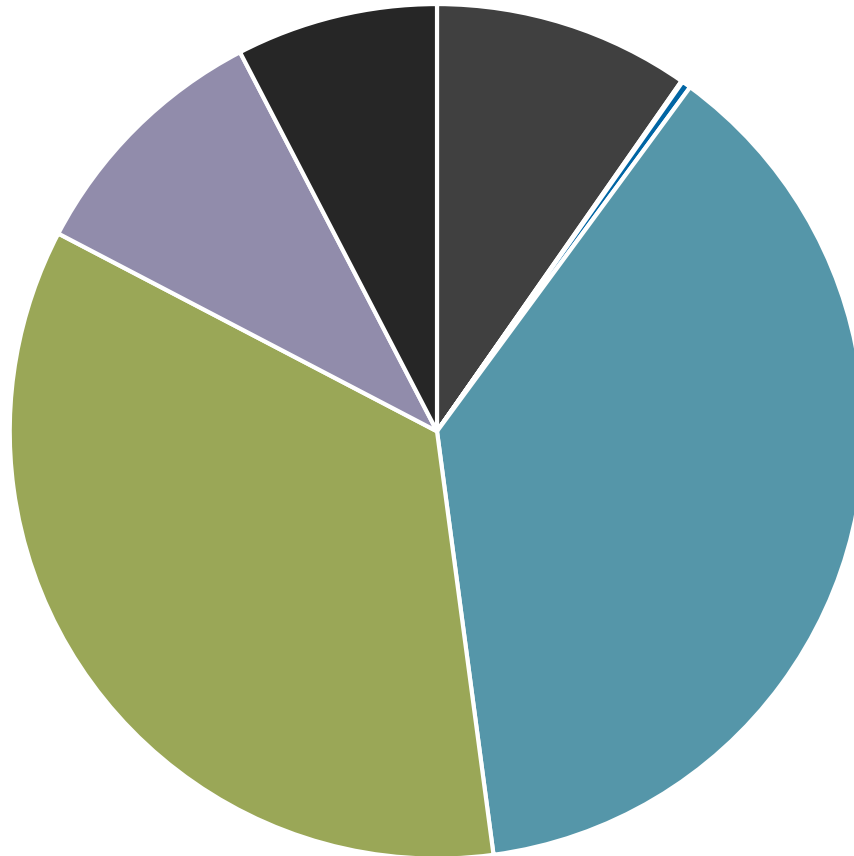
Sydney Smith
Development Director

Thank you and best wishes!

CTBA would like to thank Gaby Roman, former Director of Policy Analysis, and Daniel Kay Hertz, former Research Director for their hard work during their time at CTBA. Best wishes in your new positions!

2018 Financials

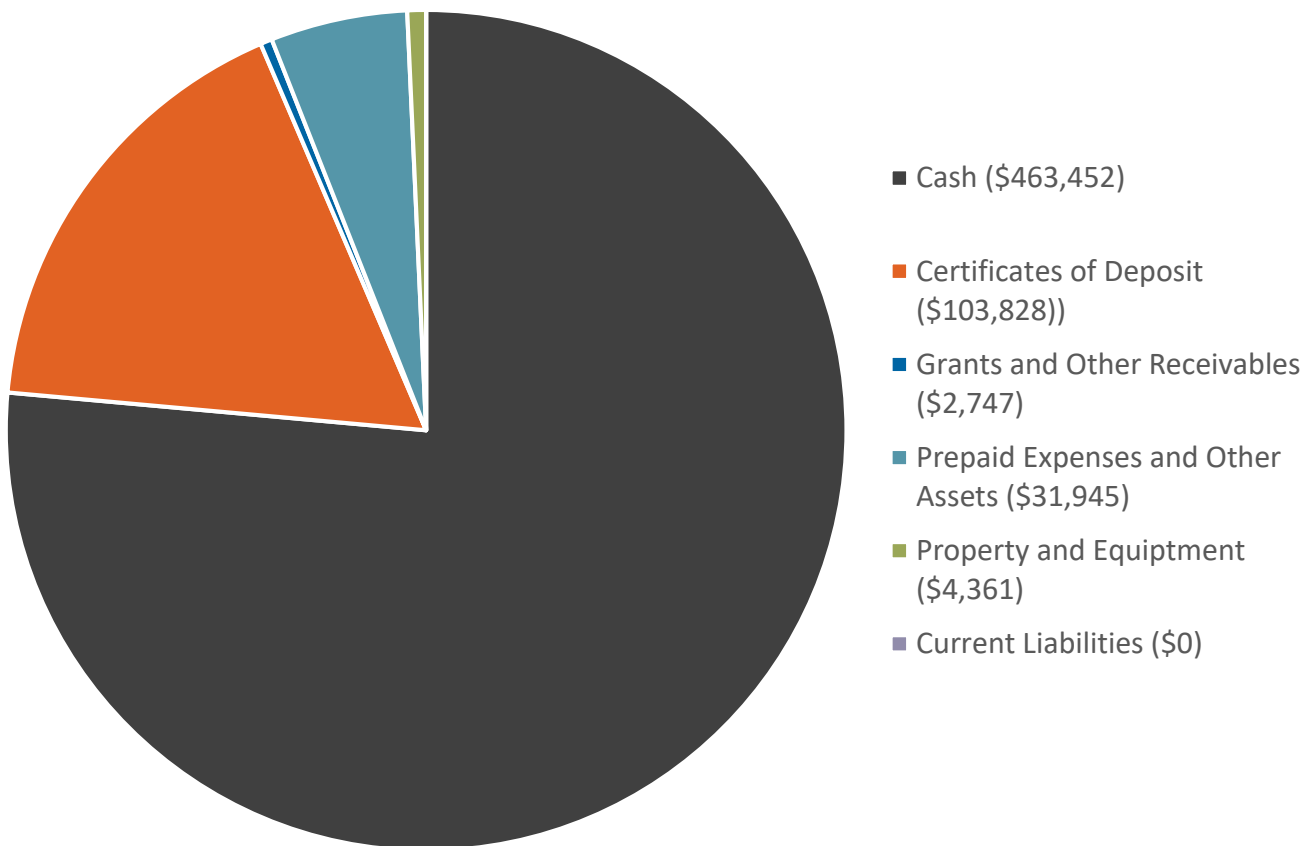
Revenue and Expenses



- Contributions and Contracts (\$120,760)
- Interest Income (\$596)
- Other Income (\$4,300)
- Net Assets Released from Restrictions (\$470,500)
- Program Services (432,863)
- Management and General (\$120,919)
- Fund Raising (\$94,962)

2018 Financials

Assets and Liabilities



Board of Directors

David May

Chair of the Board of Directors
Chair of the Executive Committee

Carlene Lutz*

Former Educator in the Chicago Public
Schools

Les Bond

Chair of the Finance Committee
Attucks Asset Management, LLC

William McNary

Citizen Action/Illinois

David Miller, DDS

Dr. Byron Brazier

Apostolic Church of God

Dan Montgomery

Illinois Federation of Teachers

John Cameron

AFSCME Council 31

Kathy Nesburg

League of Women Voters

Bonnie Gunzenhauser, Ph.D.

Dean, College of Arts and Sciences
Professor of English
Roosevelt University

Jim Reed*

Illinois Education Association

Jonathan Jackson

Chicago State University

Jean Sussman

Chair of the Development Committee
Village of Riverside

Honorable Robin Kelly

US House of Representatives, Illinois
District 2

Marleis Trover

Member of the Fiscal Symposium Host
Committee
McKendree University

Jane Lehmann

Member of the Fiscal Symposium Host
Committee
Former Elgin Community College
Professor

Addison Woodward

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

* Term ended in 2019

2018 Donors

CTBA is grateful to all its 2018 supporters, and their continuing dedication furthering equitable policies.

Institutional Donors

Government

City of Chicago Department of Finance

Foundations

Alphawood Foundation

McCormick Foundation

Woods Fund

Unions

Illinois Education Association

Illinois Federation of Teachers

AFSCHME Council 31

Organizations and Associations

Illinois Association of School

Administrators

Illinois Association of School Business

Officials

Illinois Public Pension Fund Association

The Opportunity Institute

State University Annuitants Association

Ullico Inc.

Individual Donors

\$10,000+

Anonymous

David May

\$1,000-\$9,999

Les Bond

Dr. Byron Brazier

Jane Lehman

Jeffrey May

Kathy Nesburg

Jean Sussman

Marleis Trover

Addison Woodward

\$500-\$999

Victor Corder

Denise Gamble

Margaret Gorman

Robin Kelly

Carlene Lutz

Claire & Randy McIntyre

Michael Popowits

Brenda Russell

Jeff Seeman

\$100 - \$499

Jo Anderson

Linda & Randy Balla

Stacci Barosso

Henry Bayer

Harry & Deborah Berman

\$100-\$499 cont'd

Marguerite Bloch

Brent Bohlen

Nancy H. Brandt

Norma Braude

Steven J. Catlin

Etahn M. Cohen

David V. Curtis

Ken Davis

Jim Dykehouse

Sally & Dave Egler

Franklin Gamwell

Steven Gevinson

Robert Granger

Ralph Grimm

Bonnie Gunzenhauser

Beverly Guzy

Bonnie Henry

Andrew Hibel

Richard M. Johnson

Patricia I. Jones

Mark Jontry

Jack Kaplan

Elizabeth Kahn

Ray Knippenberg

Richard C. Lanaghan

Paula Lawson

James Lockhard

Kenneth Malek

Michael B. Mangan

Stephen H. Mansfield

Donors, continued

\$100-\$499 cont'd

Christopher May
William McNary
Philip Milsk
Rita Novak
Kim & Bob Otter
Nicholas C. Pano
Al & Gail Popowits
Raymond K. Rhoads
Daniel & Susan Russo
Zachary Schiffman
Christopher Seidman
Conrad Spirrison
Sarah Dixon Spivy
Richard Sypniewski
Thomas Szot
Sam Tamkin
Dianna Uchida
Alan Voelker
Jane Wells
Thomas & Linda Youngren
Robert Zahniser

\$1-\$99 cont'd

Jim & Kelly McShane
Mark Michaels
Arlene Norsym
Robert Ralston
Mary Richie
Gloria Roman
Andrew Rowles
Dianne Schmidt
Mary Skirvin
Susan Spengler-Abell
Marjorie Sucansky
William Vanderberg
Lee Vogel
Charlie Wheeler
Gretchen Wirtz
Josie Yanguas

\$1-\$99

Anonymous
Arthur L. Berman
Arthur Biladeau
Cheryl Budzinski
Rob & Christine Cowan
Paul Debevec
Ronald Detmer
Barbara Dohrman
Susan Druffel
John Dillon
William G. Farley
Jessalyn Gotsdiner
Richard Green
Carl Kasten
Louis LaRocco
Mary Rita Luecke
Nancy Matthews
Audrey McAdams
Gretchen McDowell
Darlene McNamara

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

70 E. Lake Street, Suite 1700, Chicago, IL 60601