

CTBA | Center For Tax and
Budget Accountability

Social and economic justice through data-driven policy.

ANNUAL REPORT

2020

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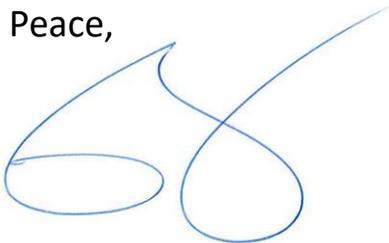
From Our Leadership

Dear Friends,

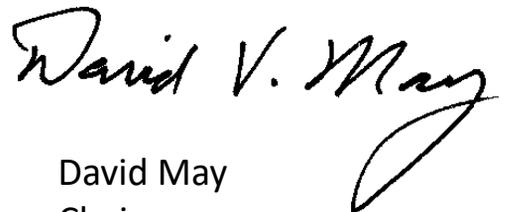
The Center for Tax and Budget Accountability, its Board of Directors, and staff are pleased to share our 2020 Annual Report with you. The pandemic made last year difficult for CTBA—and everyone else. We are grateful for your support during these trying times. But it is times like these which reinforce the importance of our work to ensure the public sector has the capacity to respond to society's challenges equitably and effectively.

Please consider making a financial contribution to CTBA. Your support ensures CTBA can continue to promote social and economic justice through adequately funded public systems that comport with best practices.

Peace,

A blue ink handwritten signature, appearing to be 'R. Martire', written in a cursive style.

Ralph Martire
Executive Director

A black ink handwritten signature, 'David V. May', written in a cursive style.

David May
Chair



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, CTBA's charge to design policy reforms that are not only evidence-based, but also bridge rather than reinforce ideological divides is more crucial than ever.

CTBA takes a data-driven, evidence-based, and best practice approach to reforming public policy systems by:

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

CTBA believes it is essential that our organization stay focused on resolving major inequities for the long term, while working collaboratively with other experts, organizations, and opinion leaders to build the broad, bi-partisan needed to reform policy systems. CTBA has learned that this approach is effective, as it has helped our organization play a positive role in reforming public policies that cover everything from education, to economic development and housing.

"I am incredibly grateful for the timely and trusted work provided by the Center for Tax and Budget Accountability. The research is always accurate, credible and evidence based. CTBA provides a nonpartisan perspective when it comes to tackling long-term policy reforms, such as education, health care, and economics, which help us address racial injustice with cold, hard facts."

Honorable Emanuel Chris Welch
Speaker of the Illinois House of Representatives

For the first time in its history, CTBA shifted to a work-from-home model in response to the pandemic. This move did not stop CTBA staff from collaborating with each other and other organizations, however, as we continued to work in coalition with over 200 other organizations on various policy initiatives. As it has done in the past, CTBA continued to make presentations for other organizations covering everything from the state's budget, Fair Tax, and EBF, to pension funding, housing and Chicago's fiscal challenges. Of course, unlike prior years these presentations were all done virtually. Moreover, working in a remote environment did not impede CTBA's staff from publishing 11 reports over the course of the year, in our ongoing effort to inform public debates with sound data.

2020 Highlights

“CTBA, under Ralph Martire’s leadership, is a trusted source for thorough budget analysis, historical and contextual considerations, as well as thought partnership with designing solutions. For legislators who have volumes of information coming at them in breakneck speed, CTBA readily makes information accessible, digestible and most importantly, actionable.”

Honorable Cristina Pacione-Zayas, PhD
Illinois Senator | 20th District

In 2020, CTBA devoted significant capacity to promoting the “Fair Tax,” which would have created a graduated income tax structure for Illinois. If implemented, the Fair tax would have simultaneously made imposition of tax burden fairer in Illinois, while raising revenue in a manner that responds to how income is distributed among workers. Unfortunately, the Fair Tax was not ratified by voters during the election last November.

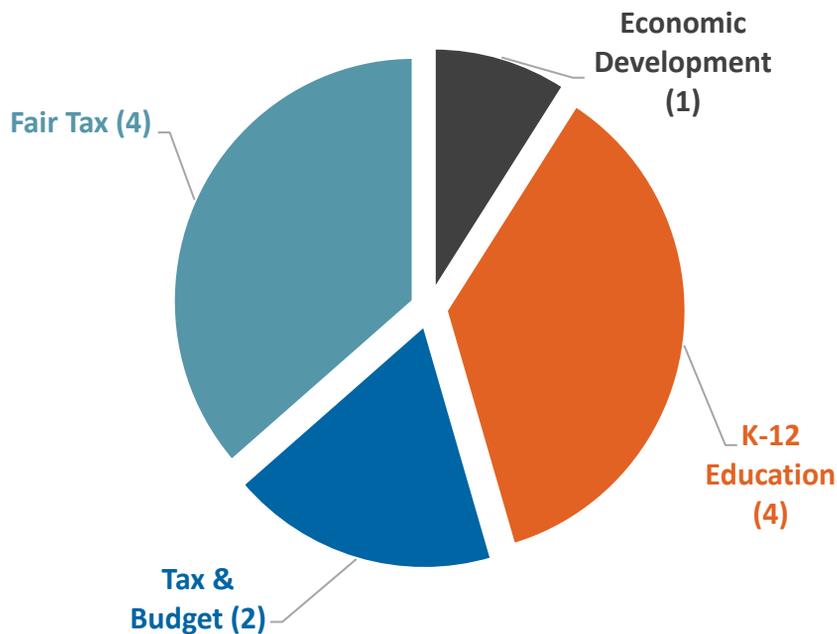
Last year, CTBA continued its long-standing work as technical advisor to members of the Illinois Legislative Black and Latino Caucuses, and various Chicago Aldermen, on everything from the fiscal reforms needed to fund the EBF fully and creating a new funding item in the EBF to cover implementation of evidence-based practices designed to eliminate gaps in achievement by race, to housing, pension funding reform and progressive revenue alternatives for Chicago.

As an appointed member of the Professional Review Panel—established by statute to monitor implementation of Illinois’ new school funding formula, the “Evidence Based Formula for Student Success,” CTBA helped convince the Panel and the Illinois State Board of Education (“**ISBE**”) from changing the application of funding distribution provisions in the EBF in a manner that would have significantly reduced the amount of funding CPS would receive in instances when the state fails to satisfy the targeted minimum year-to-year increase of \$300M in new EBF funding—which in fact did happen in FY 2021 for the first time since the EBF was initially implemented in FY 2018.

By the Numbers

CTBA produced **11** publications during 2020, even with the transition to a work-from-home model during the pandemic.

A major focus of the research CTBA conducted in 2020 involved various aspects of the “Fair Tax” initiative, which would have created a graduated rate income tax in the state. While the Fair Tax did not get ratified during the November 2020 election, CTBA’s research regarding graduated tax structures, the impact of tax changes on the economy and migration, as well as growing income inequality, have helped various coalitions and grassroots organizations to advocate for raising needed revenue while creating fair tax policy in Illinois. For more information, read CTBA’s report: [“Implementing the ‘Fair Tax’ Will Help the Illinois Fiscal System.”](#)



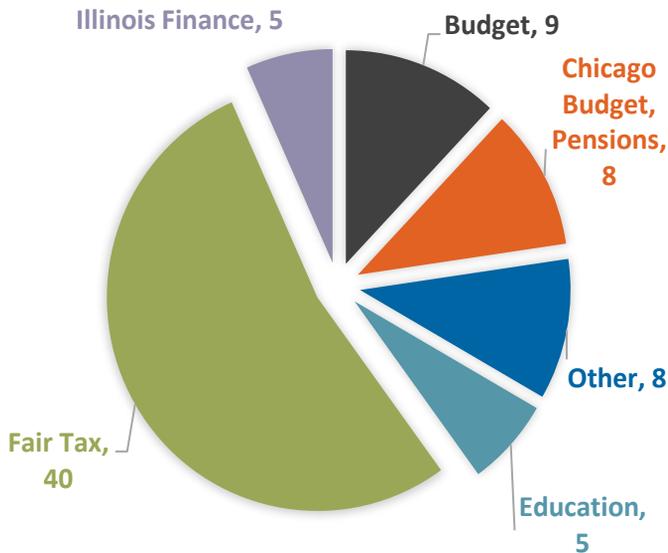
Other reports CTBA published in 2020 included a detailed analysis of Illinois’ General Fund budget for FY 2021, which highlighted the impact that federal funding, particularly the Coronavirus Aid, Relief, and Economic Security Act (CARES) had on Illinois’ budget.

CTBA also continued its series of reports covering various aspects of the EBF, with updates that highlighted, among other things, the effect that the COVID-19 pandemic had on public education funding, and how distribution of new school funding under the EBF has effectively begun to close per-pupil funding gaps by race, ethnicity and income that manifested under the state’s prior, inequitable formula .

For more information, please visit CTBA’s website www.ctbaonline.org

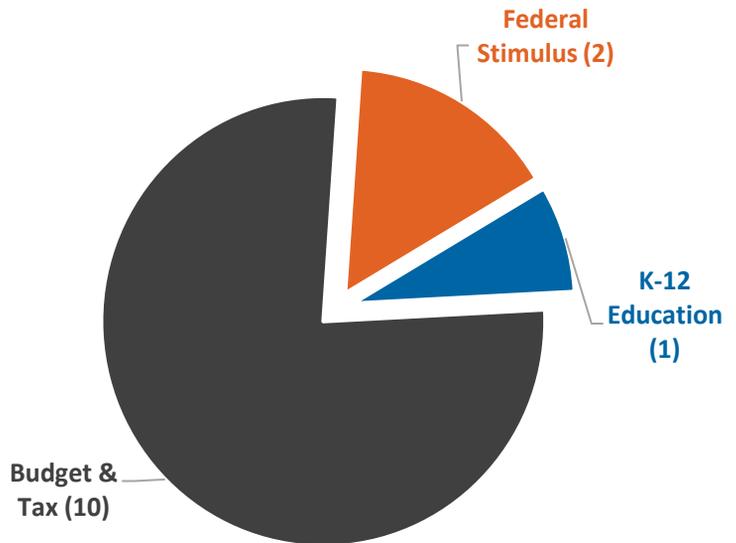
Community Engagement

PUBLIC ENGAGEMENT



Even during a pandemic, CTBA staff shared research and public policy solutions by participating in **75** public education events in collaboration with community-based and other nonprofit organizations, legislators, and the media. CTBA staff presented on issues for which it had published reports, as well as budget comparisons with other states, pensions, education, and the fair tax.

Also in 2020, CTBA's research team published **13** substantive posts to the CTBA BudgetBlog, providing timely, user-friendly analysis of policy developments related to our work. These blogs allow our research team an opportunity to get useful information out on important topics between major reports.

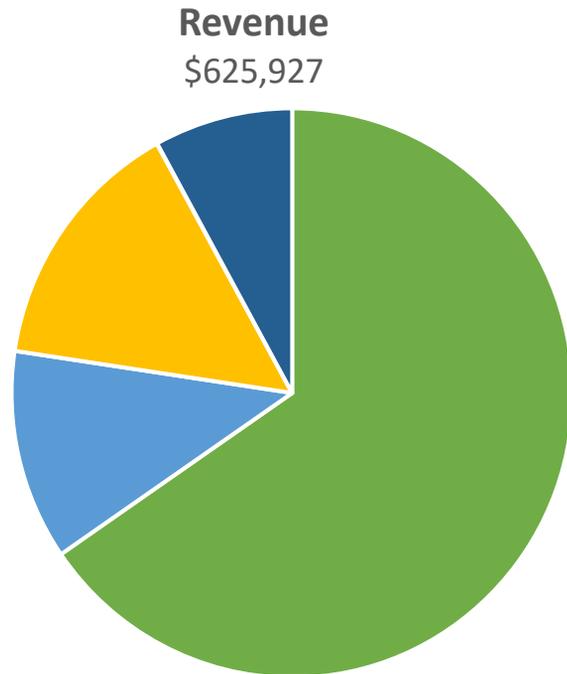


In addition to Ralph Martire's regular column in the [Springfield State Journal Register](#), [The Daily Herald](#), and [The News Gazette](#), CTBA had over **56** media hits on issues including but not limited to the fair tax, racial inequities, education, federal relief, and unemployment.

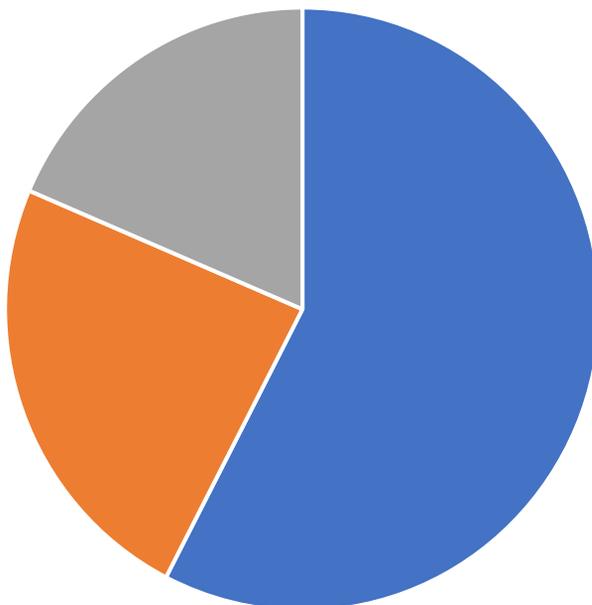


2020 Financials

- Contributions (\$409,449)
- Net Investment Income (\$74,799)
- PPP (\$91,500)
- Other (\$179)
- Net Assets Released from Restriction (\$50,000)



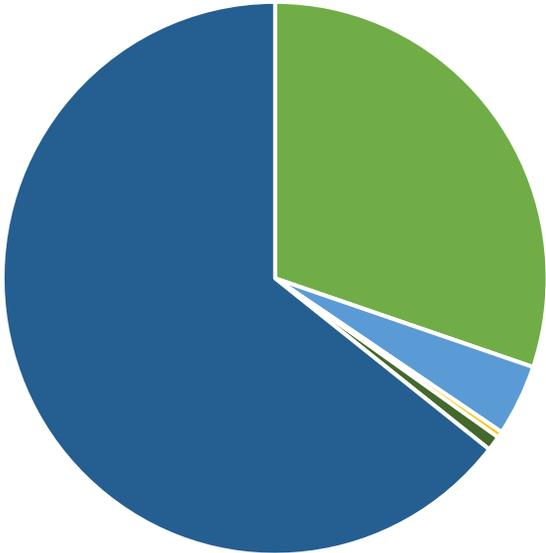
Expenses
\$582,862



- Program (\$335,665)
- Management & General (\$138,961)
- Fundraising (\$108,236)

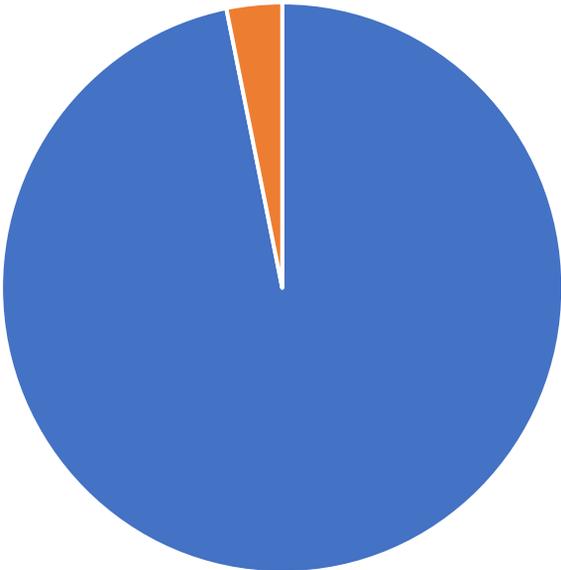
2020 Financials

Assets
\$941,108



- Cash (\$284,222)
- Grants & Donations (\$39,375)
- Prepaid Expense (\$3,434)
- Property & Equipment (\$8,128)
- Investments (\$605,949)

Liabilities
\$941,108



- Net Assets w/o Donor Restrictions (\$911,108)
- Net Assets w/ Donor Restrictions (\$30,000)

Staff



Ralph Martire, Executive Director

Ralph is executive director CTBA, as well as the [Rubloff Professor of Public Policy at Roosevelt University](#). During his time at CTBA, Ralph has helped obtain numerous legislative successes (including passage of the Evidence Based Model of Education Funding in FY2018). Ralph has received numerous awards for his work on education policy reform, including: the 2007 Champion of Freedom Award, presented by the Rainbow PUSH Coalition to individuals whose professional work embodies Dr. Martin Luther King, Jr.'s, commitment to equal educational opportunities; and the Ben C. Hubbard Leadership Award given by Illinois State University to individuals who have greatly benefited education in Illinois. ([bio](#))



Tracy Schonberger, Administrative Director

Tracy manages the overall daily office operations, including office management, technology, human resources, and contract management.



Drazzel Feliu, Research Director

Drazzel's areas of expertise include housing and general tax policy. He specializes in statistical evaluation and geospatial analysis.



Allison Flanagan, Director of Policy Analysis

Allison specializes in Education Policy research, which includes K-12 and Higher Education. In addition to leading CTBA's fiscal research on Illinois' budget and tax policy, Allison oversees CTBA's structural racism research and CTBA's internship program.



Sydney Smith, Development Director

Sydney manages foundation and corporation relationships, individual giving, and special events. She also oversees all donor communication and supports CTBA's marketing strategies.

Interns

CTBA's internship program offers undergraduate and graduate students exposure to real-world policy and data analysis. The internship aligns with CTBA's mission to develop rigorous, non-partisan, data-driven analyses and public policy recommendations that will improve the fiscal health of Illinois.

Alexis Burke
Kristine Tjia
Yisi Jing
Nicole Shen
Diego Quiroz
Madhav Bindal

Officers and Directors

David May, Chair

Les Bond

Attucks Asset Management, LLC

Dr. Byron Brazier

Apostolic Church of God

John Cameron

AFSCME Council 31

Sean Denney

Illinois Education Association

Roger Eddy

Lincoln Trail College

Jonathan Jackson

Chicago State University

Honorable Robin Kelly, Secretary

US House of Representatives,
IL-District 2

Jane Lehmann

Former Elgin Community College
Professor

Ralph Martire, President

Cami McBride

Roosevelt University

William McNary

Citizen Action/Illinois

David Miller, DDS

Dan Montgomery

Illinois Federation of Teachers

Kathy Nesburg, Treasurer

League of Women Voters

Jean Sussman

Chair of the Development Committee
Village of Riverside

Marleis Trover

McKendree University

Addison Woodward

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

2020 Donors

CTBA is grateful to all its 2020 supporters, and their continuing dedication furthering equitable policies.

Institutional Donors

Foundations and Grants

Alphawood Foundation
Elizabeth Morse Genius Charitable Trust
Robert R. McCormick Foundation
Roosevelt University
Woods Fund

Unions

Illinois Education Association
Illinois Federation of Teachers
AFSCME Council 31

Organizations and Associations

Ullico Inc.

Individual Donors

\$10,000+

Alan & Kathryn Nesburg

\$1,000-\$9,999

Honorable Robin Kelly
Jane Lehmann
Carlene Lutz
David May
Jeffrey May
Jean Sussman
Marleis Trover
Addison Woodward
Michael Popowits

\$500-\$999

Victor Corder
Margaret Gorman

\$100 - \$499

Robert Bacon
Harry Berman
Brent Bohlen
Norma Braude
Milton Brougham
Steven Catlin
Etahn Cohen
Christina Collins
John & Bonnie Cox

\$100-\$499 cont'd

Kenneth Davis
Donald Duszynski
Sally Egler
Franklin & France Gamwell
Collin Hazlett
William & Carol Jones
Elizabeth Kahn
Jack Kaplan
Richard Lanaghan
Robert LeMaire
James Lockard
Michael Mangan
Stephen Mansfield
Nancy Matthews
William McNary
Valerie McWilliams
Mark Michaels
Rita Novak
Edward Noyes
Bobby Otter
Nicholas Pano
Gail Popowits
Jane Russell
Susan Russo
Zachary Schiffman

Donors, continued

\$100-\$499 cont'd

Daniel Schwich
Donald Scott
Robert Shaevel
Milton Sumption
Paul Sussman
Samuel Tamkin
Alan Voelker
Lee Vogel
Jane Wells
Dennis Werling
Marilyn Westerhoff
Michael Wierzbicki
William Wilkinson
Maria Josefina Yanguas
Thomas H. Youngren

\$1-\$99

Susan Avila
Arthur Biladeau
Cheryl Budzinski
James Ceithaml
Diane Chapman
Ira Cohen
Paul Debevec
John Dillon
Jonathan Don
Jan Dorner
Susan Druffel
Mark Fredisdorf
Ray Hancock
Carl Kasten
Raymond Knippenberg
Linda Kolbusz-Kosan
Paula Lawson
J Leininger
James Lockard
Matthew Mateja

\$1-\$99

Gaen McClendon
Gretchen McDowell
James McShane
Philip Milsk
Vicki Mogil
Mario Morelli
Lauren Nowak
Peter Pasero
Elisabeth Powers
Leonard Ramirez
Sandra Renner
Andrew Rowlas
Kevin Russell
Curtis J. Saindon
Bob & Margie Skirvin
Conrad Spirrison
Jane Sneiderman Stokar
Marjorie & John Sucansky
Thomas & Janet Szot
Dianna Uchida
Betsy VanderCook
Patricia Vary
Prudence Widlak
Terri Winfree

Please visit www.CTBAOnline.org to make a donation,
and to sign up for CTBA's newsletter.

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