

CTBA | Center For Tax and
Budget Accountability

Social and economic justice through data-driven policy.

ANNUAL REPORT

2021

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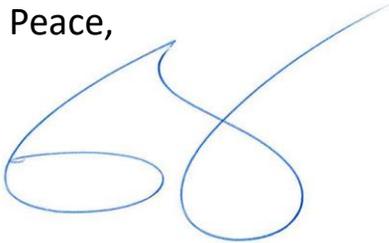
From Our Leadership

Dear Friends,

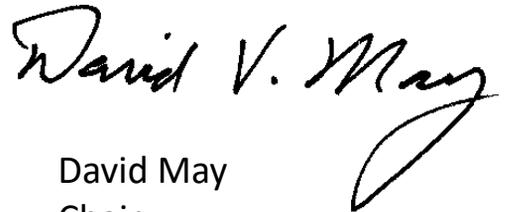
The Center for Tax and Budget Accountability, its Board of Directors, and staff are pleased to share our 2021 Annual Report with you. The pandemic made last year difficult for everyone—CTBA included. We are grateful for your support during these trying times. But it is times like these which emphasize 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 and satisfy demographically generated needs .

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 (“CTBA”) 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. CTBA:

- Promotes sustainable, long-term policy initiatives in various core areas such as education, social services, housing, healthcare, and workforce/economic development;
- Ties 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
- Works on the long-term, structural changes that are needed to create a just society.

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 support needed to reform policy systems. CTBA has been effective using this approach, as our organization has played a positive role in reforming public policies that cover everything from education, to economic development and housing.

“CTBA is one of the critical organizations in Illinois that dedicates its research to empower policymakers and other state leaders in the knowledge necessary to align the facts as they are to the policy changes that are needed. I’ve benefitted from their scholarship and expertise.

CTBA’s work may appear complicated, but their staff ensures that the narrative connected to the data is easily understood. I’m a huge fan and ardent champion of the positive contributions CTBA has made to the state and the nation. CTBA makes topics like taxes, pensions, and budgets connect with my constituents.”

Honorable Carol Ammons
Illinois Representative | 103rd District

Like many, CTBA continued to use a “work-from-home” model during the continuation of the pandemic. This did not isolate our staff, however, as we continued to collaborate with over 200 other organizations on various policy initiatives. As it has done in the past, CTBA continued to make presentations for others covering everything from the state’s budget, and the EBF, to pension funding, housing and Chicago’s fiscal challenges. Of course, unlike prior years these presentations were all done virtually. Meanwhile, 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 credible data and sound analysis.

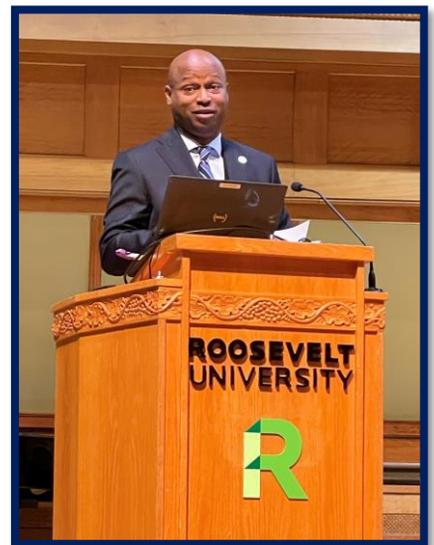
2021 Highlights

In 2021, CTBA moved from its home for over 20 years located on Lake Street in Chicago, to Roosevelt University's Auditorium Building on Michigan Avenue. At least we stayed close to public transportation.



The move took place at the end of 2021, shortly after CTBA's annual Fiscal Symposium. CTBA is excited to share a space with an institution that was created by courageous leaders that opposed past discriminatory practices in higher education and believes that a quality education should include a commitment to social justice.

After 19 months of navigating the COVID-19 pandemic, CTBA was fortunate to be able to hold its annual Fiscal Symposium, in person, although the number of available seats was limited to keep attendees safe. The symposium, entitled "**Where Do We Go From Here? Moving Toward Greater Equity in Illinois**" was keynoted by Illinois House Speaker **Chris Welch**. The Speaker outlined his vision for how to move the state forward fiscally to ensure a better future for everyone and made numerous policy suggestions that would create more equity and opportunity in Illinois, whilst being sustainable fiscally.



A panel discussion moderated by **Craig Dellimore**, Political Editor at WBBM NewsRadio 780 AM followed. Panelists included State Representative **Dan Brady**, State Senator **Mattie Hunter**, and **Cameron Mock**, former Chief of Staff and Senior Fiscal Advisor for the Governor's Office of Management and Budget (GOMB).

2021 Highlights Cont'd

CTBA believes that ensuring Higher Education has both the capacity and incentive to educate traditionally underrepresented students can go a long way towards redressing historic structural racism and marginalization. Unfortunately, the long-term trend in Illinois of reducing the real General Fund investment in Higher Education has hindered the ability of public institutions of higher education to play a more meaningful role in creating broad access to opportunity for everyone, irrespective of race, ethnicity, income status, gender or disability. Which is why CTBA released a major report titled, "[Illinois' Continued Disinvestment in Higher Education](#)" that both details the role higher education can play in creating a more equitable society by, among other things, enhancing economic mobility for low-income populations and redressing structural racism, as well as provides policy solutions to help Illinois reform public Higher Education funding mechanisms in Illinois.

One of CTBA's more meaningful collaborations last year involved providing a peer review of, as well as expert commentary for, the University of Illinois at Chicago Institute for Research on Race and Public Policy's (IRRPP) report "Chicago's Racial Wealth Gap: Legacies of the Past, Challenges in the Present, Uncertain Futures." Director of Policy Analysis, Allison Flanagan, represented CTBA at the event IRRPP hosted to release its report, and provided expert commentary on how policy structures of the past have helped create disparities along racial, ethnic, and income lines, and how policy reforms like the Evidence-Based Funding Formula for Student Success Act can begin to reverse those inequities that exist today.

"CTBA is a critical partner in the research community in Illinois. They focus on important issues of equity in the state and consistently produce top-notch research. The work is not only good but it is making a difference – shaping policy in the state to the benefit of us all."

Amanda Lewis, Director

Institute for Research on Race and Public Policy, UIC

In August of 2021, the Illinois General Assembly passed P.A. 102-0570, which established the [Commission on Equitable Public University Funding](#). The charge of the Commission is to recommend "specific data-driven criteria and approaches to the General Assembly to adequately, equitably, and stably fund public universities in this State and to evaluate existing funding methods."

CTBA's Executive Director Ralph Martire was appointed to the Commission to fill the role of a representative from a fiscal policy research organization focused on the impact that state-level budget and tax policies have on equitable education funding.

Justice, Equity, Diversity and Inclusion Coalition

The Justice, Equity, Diversity, and Inclusion Coalition (the “[Coalition](#)”) is a citizens group working to promote common sense, effective, educational, social, and economic public policies and practices. The Coalition is governed by a council of 14 members (the “[Council](#)”).

The Council

Coalition Chair	-	Chad Carpenter , Reven Capital, LLC (bio)
Membership Chair	-	Nina Linh , The Wonderseed Foundation (bio)
Government Affairs Chair	-	Paul Miller , Whizz Education (bio)
Marketing Chair	-	Steve Chucovich , Architect, Technologist & Educator Consultant (bio)
Endorsements Chair	-	Joe Goodman , Chicago Title (bio)
Co-Sponsors Chair	-	Mike Honda , Former California Congressman (bio)
Council Member	-	Ralph M. Martire , Center for Tax and Budget Accountability (bio)
Council Member	-	Ken Wesson , Educational Consultant (bio)
Council Member	-	Patrick DeConcini , 4-D Properties, LLP (bio)
Council Member	-	Roger Sherman , Gensler (bio)
Council Member	-	Will Davis , Illinois State Representative, 30 th District (bio)
Council Member	-	Eugene Itkin , Genies Center of Education Excellence (bio)
Council Member	-	Shegan Campbell , Kids Science Labs (bio)
Council Member	-	Michael Jacoby , Illinois ASBO (bio)

Who We Are

The Council serves as an Advisory Board to CTBA. CTBA is committed to ensuring state, federal, and local public policies and core systems are designed to (i) engender social and economic justice; (ii) promote opportunity for all; and (iii) comport with evidence- and/or research-based best practices.

We are Bi-Partisan

Working on long-term systems change is difficult, especially in the current divisive political environment. Hence, we believe it is crucial to gain support for redressing long-standing societal inequities by working on a bi-partisan basis and focus on bridging, rather than reinforcing, ideological divides.

What We Believe

If the American Dream means anything, it is that the circumstances of a person’s birth ought not limit what she or he can achieve in life. Neither a person’s innate characteristics nor income level should constitute barriers to opportunity, nor negate his or her civil rights.

Current Focus

The Coalition’s current focus is working with CTBA to improve K-12 education nationwide, by supporting the “Invest in Excellence and Equity in America Education Act” (the “**Bill**”). The Bill is model legislation that would help ensure each and every child in America has access to a high quality, public education that is based on the evidence of what works to promote academic success.

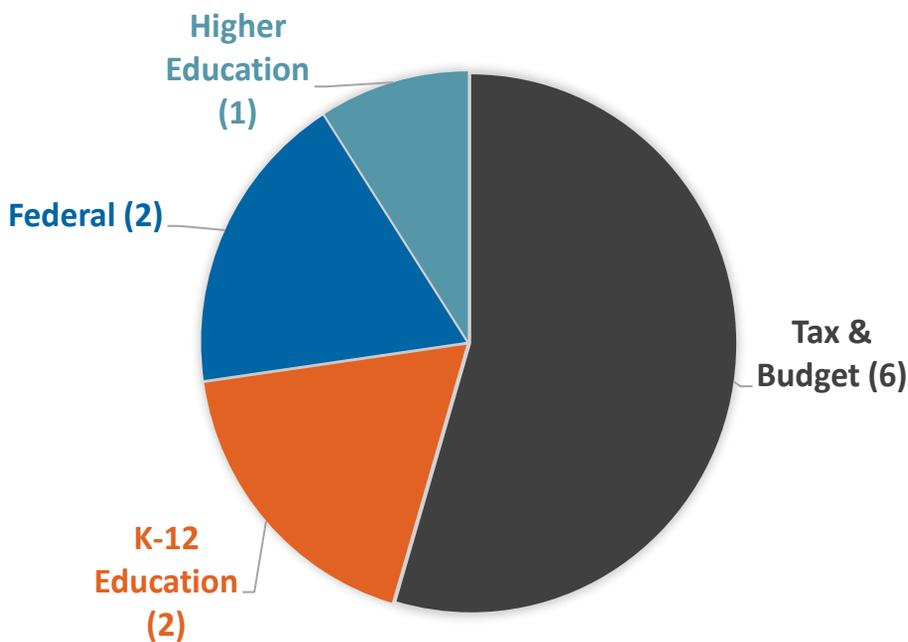
How We Work With CTBA To Promote Policy Reform and Systems Change

All of the Coalition’s work with CTBA will involve identifying both the structural flaws in extant, core public policy systems (such as in the funding of public education), and then identifying the evidence- and or research-based solutions to said flaws.

By the Numbers

CTBA produced **11** publications during 2021, in a fully-remote, work-from-home model to accommodate the ever-changing pandemic environment. The major reports released in 2021 were:

- [Analysis of Illinois FY 2022 Enacted General Fund Budget](#)
- [Eschewing Supply Side to Spur Economic Growth](#)
- [Illinois' Continued Disinvestment in Higher Education](#)
- [The Impending Fiscal Cliff of FY 2025](#)



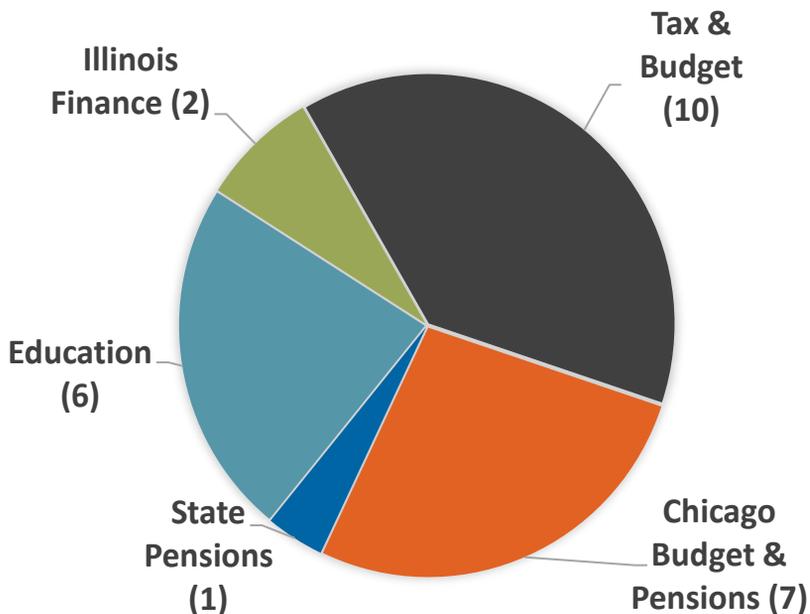
Other reports CTBA published in 2021 included a detailed analysis of Illinois' Proposed General Fund Budget for FY 2022, short reports analyzing proposed changes to tax expenditures and individual income taxes, and analyses of federal bills such as the CARES Act and American Rescue Plan.

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

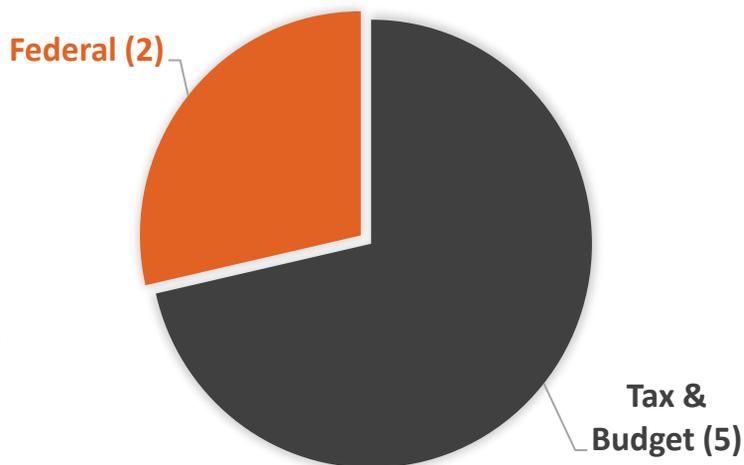
Community Engagement

PUBLIC EDUCATION ENGAGEMENT



Even as the pandemic persisted, CTBA staff shared research and public policy solutions by participating in **26** 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 housing.

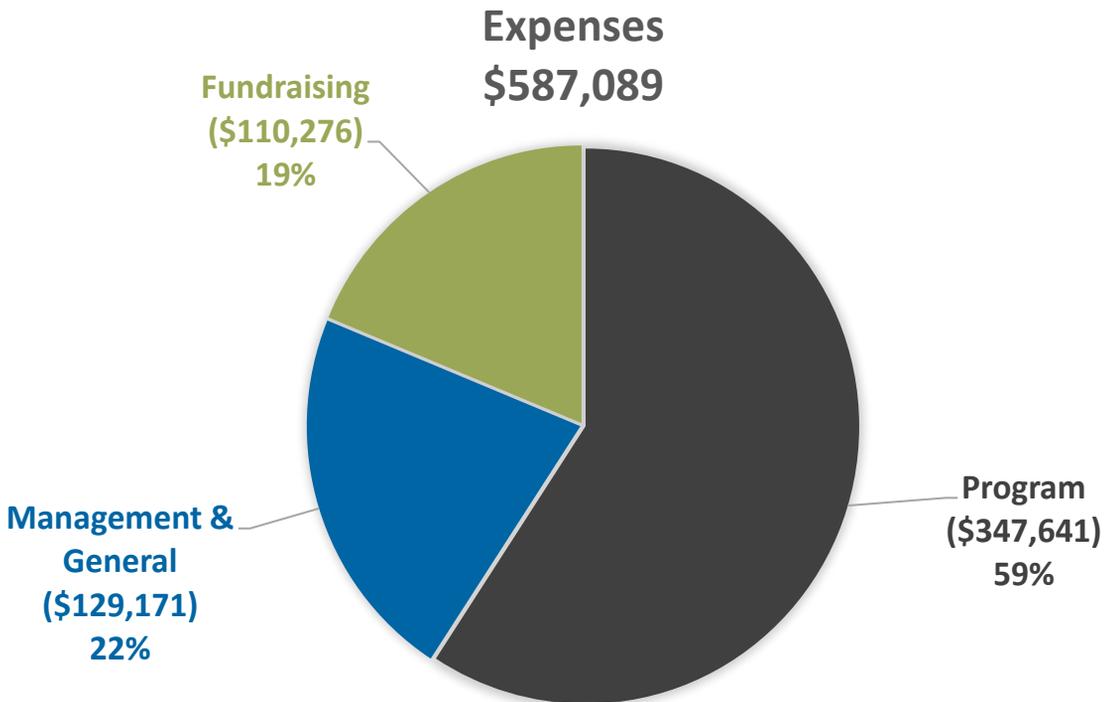
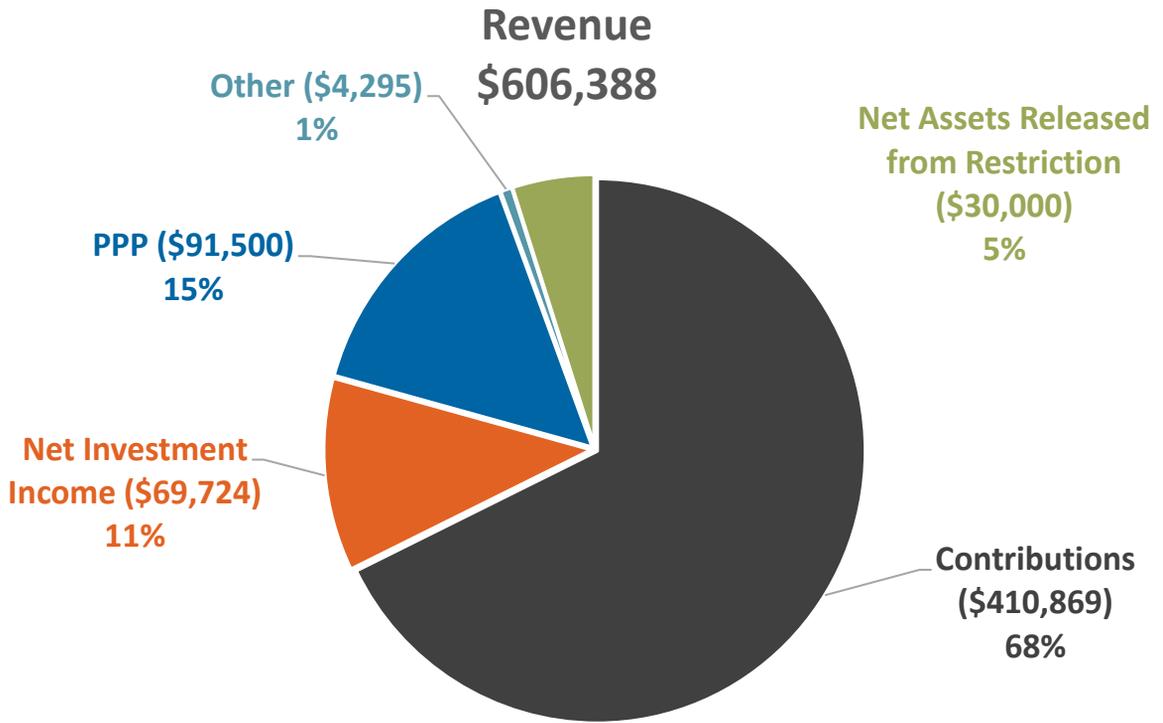
Also in 2021, CTBA's research team published **7** substantive posts to the CTBA BudgetBlog, providing timely, user-friendly analysis of policy developments related to our work. These blogs allow our research team an opportunity to get useful information out on important topics between major reports.



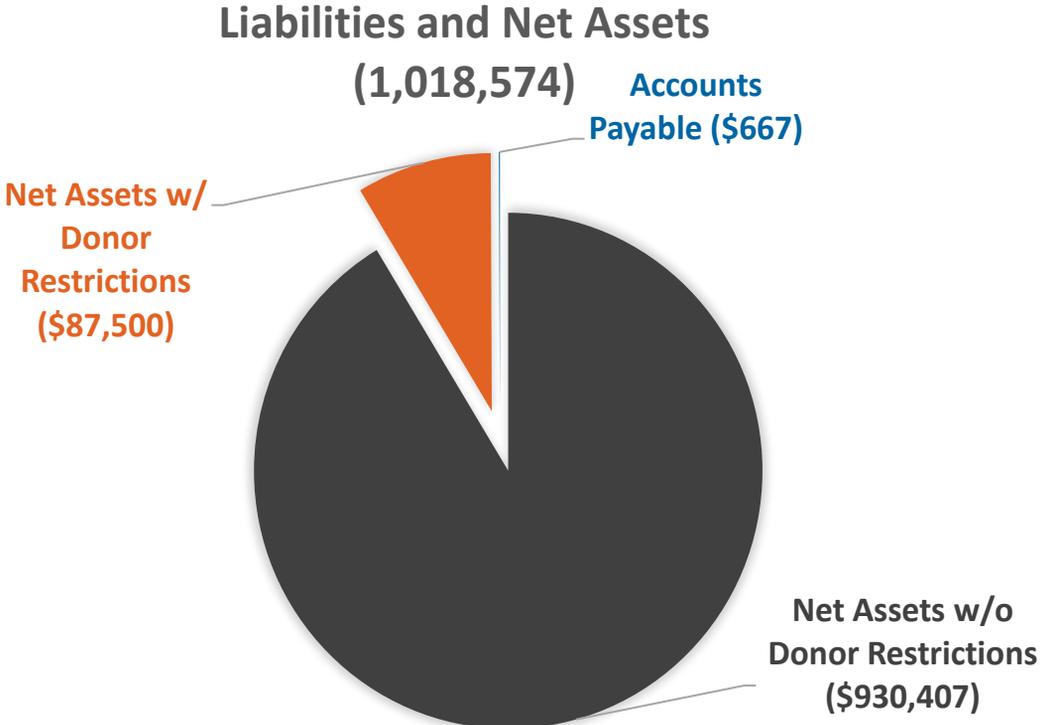
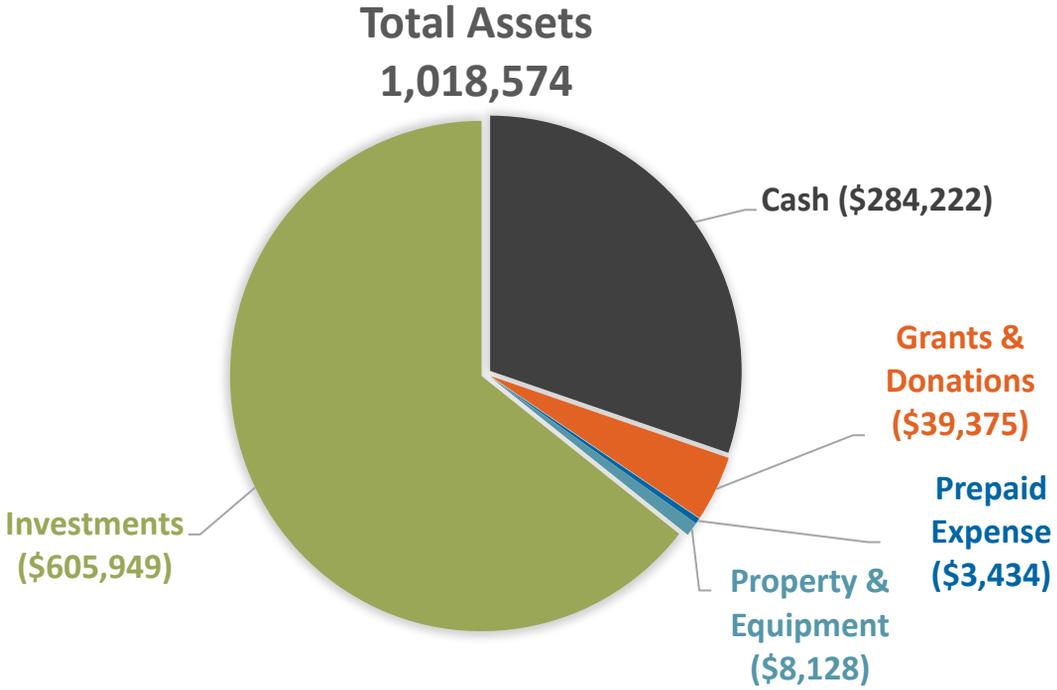
In addition to Ralph Martire's regular column in the [Springfield State Journal Register](#), [The Daily Herald](#), and [The News Gazette](#), CTBA had over **45** media hits on issues including but not limited to the Illinois budget, racial inequities, education, federal relief, and unemployment.



2021 Financials



2021 Financials



Staff

CTBA saw some changes in staffing in 2021. While we may have said farewell to CTBA's development director Sydney Smith, CTBA welcomed Sarah Wasik to the team as a research policy analyst. We wish Sydney well in her endeavors and look forward to the many contributions Sarah brings to the organization.



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 and EITC) ([bio](#))

Tracy Schonberger, Administrative Director

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



Allison Flanagan, Associate Director, Budget and Policy

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.

Drazzel Feliu, Research Director

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



Sarah Wasik, Research Policy Analyst

Sarah joined CTBA as a Research Policy Analyst with a focus on higher education, healthcare, tax policy, and fiscal policy.

Sydney Smith, Development Director

During Sydney's tenure at CTBA, Sydney managed foundation and corporate relationships, individual giving, and special events.



Younes Klaleche, Economic Policy Analyst

Younes assisted CTBA with data analysis on pensions specifically, and the Illinois budget generally. Originally from Algeria, he studied statistics and actuarial sciences.

Officers and Directors

*CTBA welcomed five new members to its board in 2021. We look forward to the many contributions these members will bring to the organization.

David May, Chair

Les Bond

Attucks Asset Management, LLC

David Borris*

Illinois Main Street Alliance

Dr. Byron Brazier

Apostolic Church of God

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

CTBA Development Committee Chair
Former Elgin Community College
Professor

Ralph Martire, President

Cami McBride

Roosevelt University

William McNary

Citizen Action/Illinois

Martha Merrill

AFSCME Council 31

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EKI-DIGITAL

Sylvia Puente*

Latino Policy Forum

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CTBA Governance/Nominating
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Former Village of Riverside Trustee

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McKendree University

Kyle Westbrook*

NXGRAD

Addison Woodward

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

"Data, facts and robust discussion can lead to the creation of good public policy, even when sides disagree. Over the years, CTBA has provided necessary data and facts around which to have the hard discussions that have led to improved public policy."

Roger Eddy, CTBA Board Member

2021 Donors

CTBA is grateful to all its 2021 supporters, and their ongoing dedication helping advance equitable policies in Illinois and nationally.

Institutional Donors

Foundations and Grants

Alphawood Foundation
Elizabeth Morse Genius Charitable Trust
The Lloyd A. Fry Foundation
Robert R. McCormick Foundation
Roosevelt University
Woods Fund

Organizations and Associations

Associated Fire Fighters of Illinois
Attucks Asset Management
Chicago Title Company
Illinois Association of School Business Officials
State University Annuitants Association
University Professionals of Illinois
Ullico Inc.

Unions

AFSCME Council 31
Illinois Education Association
Illinois Federation of Teachers
West Suburban Teachers Union Local 571

Individual Donors

\$10,000 +

David May

\$1,000-\$9,999

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Leonard Ramirez
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Joseph Zefran
Anonymous

Donors receive first release of reports, email alerts, and invitations to CTBA events. Click [HERE](#) to make a secure, tax-deductible donation today. With your support, together, we can make a difference!

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

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