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FOR IMMEDIATE RELEASE

Public Policy Forum and Wisconsin Taxpayers Alliance to Merge

Milwaukee and Madison, Wis., November 1, 2017 – The Public Policy Forum (PPF) and the Wisconsin Taxpayers Alliance (WISTAX) announced today the merger of their two organizations. The new organization will offer increased staff capacity, broader research capabilities, and an enhanced platform to better engage and inform policymakers, citizens, taxpayers, the media, and others.

“For more than 85 years, our respective organizations have shared a mission of providing informed, nonpartisan analysis of the critical policy issues affecting our economy and quality of life,” said Todd Berry, President of the Wisconsin Taxpayers Alliance. “The new organization will be resolutely committed to our shared values and areas of expertise, which will be evident in everything we do.”

Researchers at the new group will continue to focus on issues important to state government, local government, schools, Metro Milwaukee, and Wisconsin’s economy. They will also continue to provide impartial data and analysis to enable government leaders and the public to make informed decisions.

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“By merging the tradition and expertise of these two nationally recognized groups, we aim to create the most effective independent policy research organization in the country,” added Rob Henken, President of the Public Policy Forum. “Never before has the need for greater efficiency, effectiveness, and accountability in our state and local governments and school districts been more important. Together, we can be a stronger voice to examine, analyze, and inform on behalf of Wisconsin citizens.”

With offices in Milwaukee and Madison, the organization will include 11 full-time staff. Among the many benefits of the merger include greater policy acumen, research capacity, and organizational efficiency. In particular, combining the experience and skills of two award-winning research staffs will enhance both productivity and quality, allowing them to:

- Actively monitor and analyze trends in state and local government and school district finances, and use their expanded capacity to promote collaboration, efficiency, and other “best practices.”
- Conduct more in-depth studies of major state and local fiscal and public policy issues.
- Employ a wider range of communication tools to educate the public about state and local government operations and challenges.
- Promote civics education, citizen engagement, and increased public participation in state and local government.

Both organizations’ governing bodies unanimously endorsed the merger. A new executive committee will be formed, comprised of equal representation from each previous organization. Current PPF President Rob Henken will serve as the new organization’s president, while current WISTAX Research Director Dale Knapp will serve as research director. WISTAX President Todd Berry will continue to advise the team as the merger is finalized and then plans to retire.

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“We are grateful to Todd for his insight, expertise, and leadership of WISTAX over the past 24 years,” said Thomas Spero, Chairman of the Board of the Wisconsin Taxpayers Alliance. “We are extremely confident in Rob’s future leadership of our combined organization.”

“We are very excited to combine the policy expertise of our outstanding team of researchers with the skills and experience of Dale Knapp and his team,” added Andrew Schiesl, Chairman of the Public Policy Forum’s Board of Trustees. “All of our mutual stakeholders will benefit from the new and improved research products this partnership will produce.”

The merger announcement drew bipartisan praise from state and Milwaukee elected leaders.

“When I served as Milwaukee County Executive, I developed a strong appreciation for the insights and objectivity the Forum brings to Metro Milwaukee policy deliberations, and as a former legislator and now Governor I have always appreciated the similar role WISTAX has played for state government,” said Governor Scott Walker. “Combining the rich traditions of the two organizations can only be a positive development for the citizens of Wisconsin.”

“The Forum and WISTAX have shown citizens in Milwaukee and across Wisconsin that facts matter, and that data should drive government policies and action,” added Milwaukee County Executive Chris Abele. “A merged policy research organization with enhanced capacity and added resources should be able to drive that point home in an even more compelling and thorough manner.”

“The Forum’s work on Milwaukee’s fiscal and policy challenges has enhanced the quality of decision-making at our City Hall, and WISTAX’s work at the state level has brought important data and information to the fingertips of municipal officials throughout Wisconsin,” said Milwaukee Mayor Tom Barrett. “I look forward to seeing the contributions of these respected nonpartisan organizations expand when they come together as one.”

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Legal work to establish the merger will be completed by the end of the year, while other work, including a new name, will occur in 2018.

About the Public Policy Forum (PPF)

PPF was created in 1913 with a mission of promoting principles of efficiency in Milwaukee's city government. Over the years, its mission expanded to focus on research and analysis involving the wide range of public policy issues facing local governments and school districts in southeast Wisconsin.

About the Wisconsin Taxpayers Alliance (WISTAX)

WISTAX was established in 1932 and is dedicated to nonpartisan, nonprofit public policy research and citizen education. WISTAX's objective research has provided citizens, the media, and public officials with accurate, unbiased information about the workings of Wisconsin state and local government.

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Why are PPF and WISTAX merging?

By combining our organizations, we will have greater research capacity and knowledge, broader reach, and the ability to focus even more thoroughly on both state and local policymaking. Together, we can be a stronger voice to examine, analyze, inform, and educate on behalf of Wisconsin citizens.

Why now?

Increasingly, we see local policy issues that have major statewide implications; and, conversely, state-level decisions with huge local impacts. By merging the policy expertise and research skills of these two premier policy research organizations, we will be able to better analyze the variety of challenges (and promises) facing Wisconsin's economy and its state and local governments.

Foxconn offers a case in point: a local development project based in southeast Wisconsin has huge implications not just for the region, but for the entire state and even the nation. Combining our resources will enhance our ability to pull apart the various "strings," ranging from the impacts on local municipalities to the overall impact on the state's economy and state government finances.

Further, the need for impartial, fact-based information for the public and policymakers has never been greater. In a highly partisan, politically charged environment, Wisconsin will benefit from our greater capacity to provide independent and highly credible analysis.

What are the benefits?

With offices in Milwaukee and Madison, the organization will include 11 full-time staff members, which will give us greater policy acumen, research capacity, and organizational efficiency. The merger also gives us greater ability to develop and deploy modern communications tools; it also provides a more diversified funding base and gives us a wider audience reach.

What will be your areas of focus?

We will maintain a deep and unwavering commitment to our respective founding values and areas of expertise. We will continue to examine state and local government, schools, and Wisconsin's economy at the local, regional, and statewide level, as WISTAX has done since its inception; but we will not lose PPF's traditional intense focus on metro Milwaukee and its deep dives into all types of policy issues, including local government finance, education, economic development, and social services.

Specifically, we plan to:

- Actively monitor and analyze trends in state and local government and school district finances, and use their expanded capacity to promote collaboration, efficiency, and other "best practices."
- Conduct more in-depth studies of major state and local fiscal and public policy issues.



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Will you remain nonpartisan?

Absolutely and unalterably.

Should we expect the same types of research products we've come to value from PPF and WISTAX?

One of the driving factors behind this merger is our conviction that the combination of our two teams will enhance both the quality of our research and our collective research capacity. We will continue to produce comprehensive reports that provide and analyze data on local governments and school districts across the state; shorter reports and newsletters that address the workings of state and local governments and specific fiscal and economic trends; budget analyses of state government and Milwaukee's largest local governments; and in-depth reports that target policy challenges facing metro Milwaukee, state government, and all of the state's local governments and school districts.

Will my membership or subscriber experience change?

Only for the better. In-depth reports, monthly or semi-monthly newsletters, speeches to business and civic groups, presentations to legislative bodies, robust public education, media interviews, and an increasingly sophisticated social and digital communications strategy will be our core offerings.

What will be the new governance structure?

As a true merger, our new executive committee will be comprised of equal representation from each previous organization. PPF President Rob Henken will serve as the organization's president, with WISTAX Research Director Dale Knapp serving in the same capacity for the new organization. WISTAX President Todd Berry will continue to advise the team as the merger is finalized. We expect the legal entity to be formed by the end of the year, with other work, including the new name, to continue in 2018.