

GRA Agency Profiles

Profiles of Organizations, Organizational Developments, and Research Highlights
(Alphabetic by State)

Prepared for the 87th Annual Conference
of the **Governmental Research Association**

August 5 – 8, 2001

Philadelphia, PA

GRA Agency Profiles

Name of Organization/Agency: Public Affairs Research Council of Alabama

Primary Contact:

Name: Jim Williams

Position: Executive Director

e-mail address: jwillia@samford.edu

Staffing:

Research Staff: 4

Total Staff: 4

Size of Budget (in general terms): \$320,000

Primary Research Foci/Activities of 2000-01:

Research:

1. County Governments
2. State Budget
3. History of the Jefferson County Sewer System
4. K-12 Education-Adequacy
5. K-12 Education-Teacher Evaluations

Organizational Developments:

- 1.
- 2.
- 3.

Primary Success Stories from 2000-01:

1. A number of our reports have been a focus point for arguing tax referendums.
2. Have participated in efforts to reform our state constitution and have seen a groundswell of support beginning to build.
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Contributions and contracts with state agencies and local governments.

Most Pleasant Surprise of 2000-01:

Received a significant contract to produce a history of the Jefferson County Sewer System.

Received a significant contract to revamp the State Procurement System.

Items on Research Agenda for 2001-02:

1. City Government Financial Comparisons
2. Constitution Reform
3. Revamping the State Procurement System

GRA Agency Profiles

Name of Organization/Agency: Atlanta Regional Commission

Primary Contact:

Name: Sam Marie Engle

Position: Division Chief, Govt. Services

e-mail address: Sengle@atlantaregional.com

Staffing:

Research Staff: 10

Total Staff: 140

Size of Budget (in general terms):

Primary Research Foci/Activities of 2000-01:

Research:

1. Creating toolkits for local governments for effective land use and decision making structures
2. Land use and water resources plans
- 3.
- 4.
- 5.

Organizational Developments:

1. New Division chief for Governmental Services position and person to improve outreach and service to local governments
2. New Comprehensive Planning Director and many other senior staffing changes
3. Charged by state as the North Metropolitan GA Water Planning District agency coordinating and recommending water resource policy

Primary Success Stories from 2000-01:

1. Created the Community Planning Academy to teach planning officials and citizens effective planning and community development strategies
2. Created the Community Choices program to offer local governments best practices and technical assistance and resources to foster regionalism and to improve community development efforts
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Dues from the local governments in the 10 county metro Atlanta region, state and federal program and pass through grants, workshop registration fees, publication sales

Most Pleasant Surprise of 2000-01:

New sense of team spirit and renewed sense of purpose and value.

Items on Research Agenda for 2001-02:

1. Regional report card
2. Continue livable communities best practices toolkits development
3. Create a Community Resource Center to provide a one-stop shop for local governments seeking information, technical assistance, and support. Includes computer-based and human resources.

GRA Agency Profiles

Name of Organization/Agency: Taxpayers' Federation of Illinois

Primary Contact:

Name: Steve Sandstrom

Position: Research Director

e-mail address: tfi@hansoninosys.com

Staffing:

Research Staff: 1½ **Total Staff:** 5

1 part-time

Size of Budget (in general terms): \$500,000

Primary Research Foci/Activities of 2000-01:

Research:

1. County government law
2. Corporate franchise taxes
3. Telecommunications
4. Property tax caps
- 5.

Organizational Developments:

1. Sending all reports electronically to online membership
2. Added new legislative and communications associate position
3. Collaborated with a business association on our legislative directory

Primary Success Stories from 2000-01:

1. Held inaugural Tax Policy Conference 2000 for tax professionals; we are planning 2001's now
2. Celebrated our 60th anniversary at annual meeting in March, drawing our largest attendance in a decade, including 12 founding members
3. Two corporate members boosted contribution levels as a result of successful legislative lobbying effort

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Membership still accounts for main funding source (77%), with events, publications, subscriptions and small projects contributing the other 23%.

Most Pleasant Surprise of 2000-01:

1. Got U.S. Senator Dick Durbin to address audience at our 60th Annual Meeting just when national focus was on Senate's consideration of President Bush's tax plan.
2. Board of Trustees enthusiasm and involvement for rebuilding our foundation to a higher level of prominence.

Items on Research Agenda for 2001-02:

1. Demographic pressure points in future state budgets
2. School funding and the property tax
3. Writing a history of the Taxpayers' Federation to mark 60th year

GRA Agency Profiles

Name of Organization/Agency: Public Affairs Research Council of Louisiana, Inc.

Primary Contact:

Name: Jim Brandt

Position: President

e-mail address: jimbrandt@la-par.org

Staffing:

Research Staff: (5) 3 FT, 2 PT **Total Staff:** (11) 7 FT, 4PT

Size of Budget (in general terms): Approximately \$750,000

Primary Research Foci/Activities of 2000-01:

Research:

1. State Finances – PAR’s report analyzed a number of the state’s fiscal problems and recommended changes to improve the budget-making process.
2. Education Accountability – PAR is closely monitoring the implementation of the state’s education accountability plan.
3. Contracting for Legal Services – PAR is preparing for publication a report of the comprehensive study of the procedures and practices of Louisiana state and local public entities in contracting with private attorneys for legal services.
4. Constitutional Revision – PAR gave voters an objective description and analysis of the four proposed amendments on the ballot in the fall elections.
5. Guide to the Louisiana Legislature – Published every four years by PAR, this handbook was completely revised and updated to assist citizens in understanding and becoming involved in the legislative process.

Organizational Developments:

1. Restructured organizational framework of PAR (smaller Board of Directors) and updated the bylaws.
2. Initiated a \$2 million capital campaign (endowment) after a feasibility study indicated positive results.
3. Increased the size of PAR’s research staff by using special grant funding for specific projects.

Primary Success Stories from 2000-01:

1. PAR’s 50th Anniversary Celebration in 2000 included the publication of a book on PAR’s first fifty years, a television documentary on PAR’s work that was shown statewide several times, special anniversary luncheons that took place in all the large cities of the state, and editorials on PAR’s work in the major daily newspapers.
2. PAR’s commentaries and reports garnered extensive media coverage. The number of press and electronic news references to PAR increased by approximately 70% over the previous years.
3. Finances/Development – Revenues generated by PAR in 2000 exceeded expenses for the year by over \$100,000. Major gifts and foundation grants were largely responsible for the revenue gains.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Membership	65%
Special Grants	20%
Special Events/Sponsorships	9%
Sale of Publications	3%
Investment Income	3%
	100%

Most Pleasant Surprise of 2000-01:

Ability to use PAR’s 50th anniversary celebration as a platform to increase our visibility while also honoring the volunteer civic leaders who founded and guided PAR over the past five decades.

Items on Research Agenda for 2001-02:

1. Comparative Corporate Tax Study – PAR will be comparing Louisiana’s corporate tax burden with other states in the region.
2. Sunshine Laws – PAR is undertaking a comprehensive review of the state’s sunshine laws with a special emphasis on the impact of technology on the public’s access to records and meetings.
3. Educational Accountability – PAR will continue to closely monitor the implementation of the state’s education accountability plan.

GRA Agency Profiles

Name of Organization/Agency: Boston Municipal Research Bureau, Inc.

Primary Contact:

Name: Elaine Beattie **Position:** Vice President, Research **e-mail address:** ebeattie@bmr.org

Staffing:

Research Staff: 3 **Total Staff:** 5

Size of Budget (in general terms): \$600,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Advocating for reform in the Boston Public Schools through changing personnel practices in the teachers' contract.
2. Assessment of Boston's recent financial performance
3. Involvement in policy issues that will affect economic development in Boston

Organizational Developments:

1. Added 2 new staff members to the research side (replacements)
2. Continuing implementation of strategic plan & launching new marketing strategy
3. Planning for 70th anniversary next year 2002

Primary Success Stories from 2000-01:

1. Establishment of broad based coalition for school reform and a successful campaign that resulted in changes to school personnel practices.
2. Annual meeting, with Mayor as featured speaker, hit an all time high for attendance and fundraising.
3. 15th Annual Henry L. Shattuck Public Service Awards to honor city employees for extraordinary service

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Membership = 55%

Events/Meetings/Forums = 28%

Foundations = 13%

Investment & Interest = 4%

Most Pleasant Surprise of 2000-01:

Success of coalition of parents, the business community, religious organizations and community groups that came together advocating and working toward reform of the Boston Teachers' contract. This was a very diverse group that, despite differences, pulled together to be a catalyst for significant change and reform in the Boston Teachers' contract in the key area of personnel practices.

Items on Research Agenda for 2001-02:

1. Monitoring of the Boston Teachers' Contract implementation
2. Boston's financial review – a look 5 years back and 3 years into the future
3. Boston's linkage program that links development with the creation of jobs and housing in Boston.
4. Advocate for reform of the Boston Fire Department through collective bargaining changes and administrative/management improvements.
5. Participate in assessment of Boston's Living Wage policy to determine whether further modification is warranted.
6. Following Bureau's 1997 report on financing of Convention Center, review of status of the financial factors.

GRA Agency Profiles

Name of Organization/Agency: Worcester Regional Research Bureau

Primary Contact:

Name: Roberta R. Schaefer **Position:** Executive Director **e-mail address:** rschaefer@wrrb.org

Staffing:

Research Staff: 3 **Total Staff:** 4

Size of Budget (in general terms): \$250,000 plus \$535,000 grant for 3 years from Alfred P. Sloan Foundation

Primary Research Foci/Activities of 2000-01:

Research:

1. Benchmarking municipal and community performance-grant from Sloan Fnd.
2. The Pros and Cons of Project Labor Agreements on Public Construction Projects
3. The Future of Public Housing in Worcester
4. Proposals for Promoting Economic Development
5. Annual review of Worcester's financial condition

Organizational Developments:

1. Changed name to Worcester Regional Research Bureau to reflect shifting focus
2. Established Center for Community Performance Measurement to administer grant
3. Established multiple community advisory committees for benchmarking project

Primary Success Stories from 2000-01:

1. Received 3-year grant for \$535,000 to benchmark municipal and community performance
2. Established relationship with Fund for the City of New York to adapt its ComNET (computerized Neighborhood Environment Tracking) program as part of our performance measurement project.
3. Expanded commuter rail service in part as a result of Research Bureau report issued last year.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Local corporations, local foundations, Alfred P. Sloan Foundation, individuals

Most Pleasant Surprise of 2000-01:

Receipt of Sloan Foundation grant and willingness of municipal government and neighborhood associations to work with the Research Bureau in implementing it.

Items on Research Agenda for 2001-02:

1. The 2000 census and its implications for the Worcester and the region.
2. Charting a new course for the Worcester Regional Transit Authority
3. The status of education reform in Worcester

GRA Agency Profiles

Name of Organization/Agency: Citizens Research Council of Michigan

Primary Contact:

Name: Earl M. Ryan

Position: President

e-mail address: eryan@crcmich.org

Staffing:

Research Staff: 4.5

Total Staff: 8

Size of Budget (in general terms): \$730,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Statewide ballot issues (Vouchers, Limitations on legislation dealing with local govt.)
2. Funding of regional services
3. Economic development incentives
4. State health care programs
5. Gap between taxable and assessed value

Organizational Developments:

1. Endowment campaign
2. Launch of health care policy project
- 3.

Primary Success Stories from 2000-01:

1. Growth in utilization of website
2. Focus on regional issues
3. Impact of analysis of voucher issue on November ballot

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Corporate contributions, Foundation grants, Investment earnings.

Most Pleasant Surprise of 2000-01:

Increase in recognition of work of CRC by media, others.

Items on Research Agenda for 2001-02:

1. Funding of regional services
2. Voting in Michigan: Time, Place, and Manner
3. Access to health care services

GRA Agency Profiles

Name of Organization/Agency: Minnesota Taxpayers Association

Primary Contact:

Name: Dan Salomone

Position: Executive Director

e-mail address: policy@mntax.org

Staffing:

Research Staff: 2 (incl. Exec. Dir.) **Total Staff:** 3

Size of Budget (in general terms): \$365,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Forest taxation
2. Corporate Apportionment
3. 50- State Property Tax Comparison
4. 50- State Personal Income Tax Comparison
5. Future of State Taxation (Sales tax, Personal Income Tax, Corporate Income Tax, Property Tax)

Organizational Developments:

1. Negotiating Affiliation with Local College
2. Increased Use of e-mail briefings for key members
3. Preparing to celebrate 75th year—Oct. 3rd Banquet

Primary Success Stories from 2000-01:

1. After over ten years of promoting property tax reform, the 2001 legislature passed a major reform plan consistent with what we've been asking for. A simpler, more accountable system.
2. E-mail briefings to key members has had rave reviews. Expect better member retention, more successful marketing of memberships in the future. Issues: Setting the support threshold for e-mail briefings
3. Client-based contract research. Over 20% of total budget. Helped achieve \$50,000 operating surplus in 2000.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

75% members, 20% funded research, 5% other (including events)

Most Pleasant Surprise of 2000-01:

A balanced budget! Victory on property tax reform.

Items on Research Agenda for 2001-02:

1. City aid formulas (unfinished piece of property tax reform)
2. Communications on recent property tax reform
3. Business Activities Tax (State VAT) -- Tentative

GRA Agency Profiles

Name of Organization/Agency: Nevada Taxpayers Association

Primary Contact:

Name: Carole Vilaro

Position: President

e-mail address: info@nevadataxpayers.org

Staffing:

Research Staff:

2

Total Staff:

4

Size of Budget (in general terms): \$300,000 plus

Primary Research Foci/Activities of 2000-01:

Research:

1. Education Funding in Nevada
2. Infrastructure Funding in Nevada
3. Analysis and Impact of proposed teachers' union business income tax initiative
- 4.

Organizational Developments:

1. Hired Special Projects Person
2. Relocated Carson City office to larger quarters across the street from legislative building
- 3.

Primary Success Stories from 2000-01:

1. Hosted annual membership dinner
- 2.
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Primary source is from membership - 80%

First year (2000) for research projects - 10%

Annual Dinner - 10%

Most Pleasant Surprise of 2000-01:

The success and accolades received on the Legislative Dinner

Items on Research Agenda for 2001-02:

- 1.
- 2.
- 3.

GRA Agency Profiles

Name of Organization/Agency: Center for Government Services (a component of the Edward J. Bloustein School of Planning and Public Policy at Rutgers, The State University of New Jersey)

Primary Contact:

Name: Henry A. Coleman

Position: Director

e-mail address: hcoleman@rci.rutgers.edu

Staffing:

Research Staff: 2 (part time faculty)

Total Staff: 24 (including 2 part timers and one emeritus faculty member)

Size of Budget (in general terms): approximately \$3.2 million per year

Primary Research Foci/Activities of 2000-01:

Research:

1. This organization provides continuing professional education training, technical assistance/public service, and applied research, directed at New Jersey's state and (especially) local governments. We are not solely or primarily a research organization.
2. We offer training to approximately 24,000 individuals each year through about 800 courses, seminars, workshops, and conferences in 17 program areas.
3. Our primary research activity is the preparation of an annual data compendium, the New Jersey Legislative District Data Book..
4. Center staff conducted research on the "Implementation of Whole School Reform in New Jersey."
5. The Center conducted nine major training-related conferences during the 2000-01 fiscal year.

Primary Success Stories from 2000-01:

1. In 2000, the Center for Government Services celebrated 50 years of service to Rutgers University and to the State of New Jersey.
2. In 2000, the Center's annual New Jersey Legislative District Data Book celebrated its 25th anniversary.
3. In January 2001, the Center's only national training program, Executive Director Education Program, which is co-sponsored by the Public Housing Authority Directors Association, graduated its first class.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

The Center's budget is derived from several sources, including 1) fees charged for attending training programs, 2) training programs provided under contract/grant with the New Jersey State government, 3) external contracts/grants, primarily from foundations and state government, to conduct research and other special projects, 4) the sale of various publications and study materials, and 5) University appropriations (the latter category accounts for less than six percent of the total budget for the Center)

Items on Research Agenda for 2001-02:

1. The Center remains active in research on issues related to state and local tax policy, especially property taxes.
2. The Center will continue to be involved in research related to school finance and whole school reforms.
3. The center will continue to produce its annual data compendium on New jersey Legislative Districts.

GRA Agency Profiles

Name of Organization/Agency: New York State Office of the State Comptroller

Primary Contact:

Name: Bill Murphy

Position: Assistant Director

e-mail address: wmurphy@osc.state.ny.us

Staffing:

Research Staff: 150

Total Staff: 2,200

Size of Budget (in general terms): \$200 million

Primary Research Foci/Activities of 2000-01:

Research:

1. Education
2. Budget
3. Welfare Reform
4. Gambling
5. Campaign Finance Reform

Organizational Developments:

- 1.
- 2.
- 3.

Primary Success Stories from 2000-01:

- 1.
- 2.
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Most Pleasant Surprise of 2000-01:

Items on Research Agenda for 2001-02:

1. Education
2. Economic Development
3. Welfare Reform

GRA Agency Profiles

Name of Organization/Agency: Public Policy Institute of New York State

Primary Contact:

Name: Robert Ward **Position:** Director of Research **e-mail address:** wardb@nysnet.net

Staffing:

Research Staff: 2 **Total Staff:** 3

Size of Budget (in general terms):

Primary Research Foci/Activities of 2000-01:

Research:

1. Comparative economic and social statistics for New York and other states
2. Proposed school district tax and spending increases in New York
3. New York State budget
- 4.
- 5.

Organizational Developments:

- 1.
- 2.
- 3.

Primary Success Stories from 2000-01:

1. Attracted significant new attention to rising school property taxes
2. Called attention to potential benefits of reforms to state corporate tax structure
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Contributions from companies that are members of The Business Council of New York State Inc., our parent organization

Most Pleasant Surprise of 2000-01:

The Census Bureau is finally getting a bit more current with its data on state and local finances for all the states.

Items on Research Agenda for 2001-02:

1. Robert Ward is finalizing the text of "New York State Government: What It Does, How It Works," to be published in December by the Nelson A. Rockefeller Institute of Government, part of the State University of New York.
2. Studies of the economic impact of proposed new electrical generating plants in New York State.
3. Continued attention to the cost of doing business in New York compared to other states.

GRA Agency Profiles

Name of Organization/Agency: N.C. Center for Public Policy Research

Primary Contact:

Name: Ran Coble

Position: Executive Director

e-mail address: rancoble@nccppr.org

Staffing:

Research Staff:

Total Staff:

6

Size of Budget (in general terms): \$642,322

Primary Research Foci/Activities of 2000-01:

Research:

1. Governance of Higher Education in 50 States
2. State lotteries
3. Rural economic development, especially in eastern NC
4. Rise of Hispanic population and health issues affecting Hispanics
5. N.C.'s record in sustaining public school reform

Organizational Developments:

1. Successful completion of endowment campaign and initiation of effort to develop individual donors
2. Development of partnership with Time Warner Cable on statewide cable TV broadcasts of our educational events
3. Decisions on what to do on the Internet

Primary Success Stories from 2000-01:

1. Testifying before 2 legislative study commissions on job training and children with special needs and gaining passage of legislation implementing our recommendations on wood chip mills and stricter criteria for use of tax incentives to attract industry
2. Partnerships with broadcast media – public radio, public TV, cable TV, and network of 90 commercial radio stations
3. National media attention given to our study of *Governance and Coordination of Public Higher Education in All 50 States* and national award for our cable TV program

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

- | | |
|--|-----|
| 1. Foundation grants | |
| a. General operating support | 20% |
| b. Grants for particular research projects | 27 |
| 2. Corporate contributions | 24 |
| 3. Endowment: interest income | 14 |
| 4. Individual donors | 7 |
| 5. Memberships | 7 |
| 6. Sales of publications | 2 |

Most Pleasant Surprise of 2000-01:

Increased Board involvement due to several years of implementation of Board Performance Standards on fundraising, membership, attendance, review of draft publications, etc.

Items on Research Agenda for 2001-02:

1. Evaluation of University Board of Governors' performance
2. Charter schools
3. Issues where race and state government intersect

GRA Agency Profiles

Name of Organization/Agency: Ohio Public Expenditure Council

Primary Contact:

Name: Don Berno

Position: President

e-mail address: don.berno@ohiopolicy.org

Staffing:

Research Staff:

2

Total Staff:

3

Size of Budget (in general terms): Under \$300,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Ohio State Budget Activities
2. Economic Development's Relationship with Local Government Revenues and Expenditures
3. Ecommerce/Streamlined Sales Tax
4. Education Revenues and Expenditures
- 5.

Organizational Developments:

1. No new organizational developments
- 2.
- 3.

Primary Success Stories from 2000-01:

1. Major media coverage resulting from reports and press releases related to Ohio's state expenditure and revenue budget problems.
2. Developing and hosting "Ohio E-Tax: Taxing Online Sales" conference.
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Memberships, subscriptions, special contract work

Most Pleasant Surprise of 2000-01:

President Don Berno was called the "reluctant bearer of bad tidings" by Gongwer News Service.

Items on Research Agenda for 2001-02:

1. Education Funding
2. State Budget Issues
3. Ecommerce/Streamlined Sales Tax Project

GRA Agency Profiles

Name of Organization/Agency: Pennsylvania Economy League, Inc., Central Division

Primary Contact:

Name: Charles W. Watters **Position:** Executive Director **e-mail address:** pelcent@epix.net

Staffing:

Research Staff: 4+ **Total Staff:** 7+

Size of Budget (in general terms): \$500,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Aiding the city of Scranton Recover from Financial Distress
2. Opportunities for Increased Intermunicipal Cooperation and/or Outright Merger and Consolidation
3. Long-range Planning for School Districts
4. Controlling Local Tax Collection Costs
5. Municipal and School Taxation, Finance, and Service Delivery

Organizational Developments:

1. Nothing extraordinary
- 2.
- 3.

Primary Success Stories from 2000-01:

1. Significant reductions in tax collection costs
2. Considerable movement toward merger, consolidation, and joint service delivery
3. Improvements in Scranton's financial outlook

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

About evenly split between membership support and fees for research services

Most Pleasant Surprise of 2000-01:

Still waiting...

Items on Research Agenda for 2001-02:

1. For the most part, a mirror image of 2000-01 except for efforts to control tax collection costs which are limited to once-in-four-years based on Pennsylvania's election cycle.
- 2.
- 3.

GRA Agency Profiles

Name of Organization/Agency: Pennsylvania Economy League, Western Division, serving southwestern Pennsylvania
The PEL is a statewide organization. The Western Division serves southwestern Pennsylvania and is affiliated with the Allegheny Conference on Community Development, the Greater Pittsburgh Chamber of Commerce and the Pittsburgh Regional Alliance.

Primary Contact:

Name: Michael Weir

Position: Senior Fellow

e-mail address: mweir@accdpel.org

Staffing:

Research Staff: 11

Total Staff: 22

Staff includes staff shared with the Allegheny Conference on Community Development

Size of Budget (in general terms): \$1.9 million, not including affiliates

Budget does not include affiliated organizations

Primary Research Foci/Activities of 2000-01:

Research:

1. Workforce Development
2. Municipal finance – dealing with structural deficits in major units of government
3. Public education – financing, reform and governance
4. Regional infrastructure – particularly water and sewer, industrial sites and amenities

Organizational Developments:

1. PEL and its affiliate, the Allegheny Conference on Community Development, have expanded the affiliation to include the Greater Pittsburgh Chamber of Commerce and the Pittsburgh Regional Alliance, a private economic development organization. In addition to pursuing its own Western Division agenda and working on statewide PEL projects, the PEL's Western Division serves as the research arm for this Strategic Affiliation.

Primary Success Stories from 2000-01:

1. Assisting Allegheny County in the transition from a commission form of government to a home rule form of government with a strong county executive and a county council. The League was instrumental in promoting home rule and then staffing the home rule charter drafting committee
2. Working with an educationally and financially distressed school district in the development of a state-mandated School Improvement Plan
3. Providing research and support on regional water and sewer issues to focus region on funding mandated improvements

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Members, some fees from governments requesting assistance, and foundation funding.

Most Pleasant Surprise of 2000-01:

The development of a close working relationship with the new Allegheny County home rule government.

Items on Research Agenda for 2001-02:

1. Workforce development
2. Public education financing and reform
3. Local government structural deficits and municipal finances and taxes
4. Proving information on issues for the 2002 gubernatorial election, a project that is shared with the other PEL divisions
5. Intergovernmental cooperation

GRA Agency Profiles

Name of Organization/Agency: Rhode Island Public Expenditure Council

Primary Contact:

Name: Gary S. Sasse

Position: Exec. Dir.

e-mail address: g_sasse@ripec.com

Staffing:

Research Staff: 3

Total Staff: 5

Size of Budget (in general terms): \$600,000

Primary Research Foci/Activities of 2000-01:

Research:

1. State & local tax policy
2. Education/education finance
3. Municipal fiscal affairs
4. Urban policy
- 5.

Organizational Developments:

- 1.
- 2.
- 3.

Primary Success Stories from 2000-01:

1. Income tax reform, including elimination of piggyback system and elimination of tax on long-term capital gains.
2. Continuation of the phase-out of the motor vehicle tax.
3. Governor's proposal to modify system of distributing school aid.
4. Responded to analysis of the Department of Children, Youth & Families.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Two-thirds membership

Most Pleasant Surprise of 2000-01:

Legislative response to recommendations made to reform Rhode Island's tax structure.

Items on Research Agenda for 2001-02:

1. Program Committee is currently considering 2002 Agenda.
2. Anticipates that it will focus upon:
 - State Budget Drivers;
 - Municipal Fiscal Health Check; and
 - Property tax reform, and Corporate apportionment formula.
- 3.

GRA Agency Profiles

Name of Organization/Agency: Texas Taxpayers and Research Association and TTARA Research Foundation

Primary Contact:

Name: William Allaway

Position: President

e-mail address: ballaway@ttara.org

Staffing:

Research Staff: 4

Total Staff: 6

Size of Budget (in general terms): \$ 1 million

Primary Research Foci/Activities of 2000-01:

Research:

1. Biennial legislative session
- 2.
- 3.
- 4.
- 5.

Organizational Developments:

1. Successful implementation of new membership dues structure.
- 2.
- 3.

Primary Success Stories from 2000-01:

1. Successful representation of membership interests during legislative session.
- 2.
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Membership dues, meeting registration fees and sponsorships.

Most Pleasant Surprise of 2000-01:

Passage of legislation establishing property tax abatement program for major capital investments.

Items on Research Agenda for 2001-02:

1. Interim legislative study of school finance and state and local tax system.
- 2.
- 3.

GRA Agency Profiles

Name of Organization/Agency: Taxpayers Research Council of Galveston County, Inc. and
Taxpayers Research Council of Brazoria County, Inc.
Note: These two organizations are legally separate entities, but share the same staff
and coordinate research effort, so I'll just submit one profile

Primary Contact:

Name: Karen Temple **Position:** Executive Director **e-mail address:** ktemple@taxpayersresearch.org

Staffing:

Research Staff: 2.5 **Total Staff:** 3.0

Size of Budget (in general terms): \$140,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Bond Elections
2. Tax Office Consolidation
3. Finances of cities, counties, schools and colleges
4. Property Taxes
5. Producing short reports on "current event" topics

Organizational Developments:

1. We began accepting contract work – a study for a school district, a study for the county, several reports for an economic development group in an adjacent county and a webpage for a small special district.
2. Developing a new revenue source. For years we have published the Directory of Public Officials and Agencies in Galveston County and one for Brazoria County. We are expanding to produce similar directories in two nearby counties.

Primary Success Stories from 2000-01:

1. Tax Office Consolidation study gave school board members factual, objective information that aided in their decision to close their tax office and contract with the County Tax Office for property tax collection.
2. Bond studies were well received and used by voters to make their decisions.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Memberships from business and industry
Subscriptions from local governments
Sales of Directories and reports
Contract work

Most Pleasant Surprise of 2000-01:

We avoided being caught in the crossfire between two warring public officials that included several lawsuits. Recently settled with a mediator.

Items on Research Agenda for 2001-02:

1. Standard reports
2. Tax Abatement
3. Industrial District Contracts?

GRA Agency Profiles

Name of Organization/Agency: Utah Foundation

Primary Contact:

Name: Stephen Kroes

Position: Executive Director

e-mail address: steve@utahfoundation.org

Staffing:

Research Staff:

2

Total Staff:

3

Size of Budget (in general terms): \$300,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Poverty and health insurance
2. School finance
3. School testing/performance
4. Tax comparisons
5. Methods of financing state and local government (book)

Organizational Developments:

1. Hired a new executive director in May
2. Executive director appointed to Governor's Council of Economic Advisors
- 3.

Primary Success Stories from 2000-01:

1. Publication of a comprehensive book providing current and historical information on all significant taxes and other funding sources for state and local governments in Utah. It is a text for some college courses.
2. Helped clarify future prospects for a school endowment fund, providing long-term estimates at various earnings and payout rates. No one had approached this in such a comprehensive way.
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Corporate memberships, foundation grants, public-sector members, publication sales

Most Pleasant Surprise of 2000-01:

That the kid from California would get hired as executive director!

Items on Research Agenda for 2001-02:

1. Water policy and usage patterns in Utah
2. Analysis of the poverty level and the value of welfare and health benefits
3. Implications of changing demographics as shown in the 2000 Census

GRA Agency Profiles

Name of Organization/Agency: Washington Research Council

Primary Contact:

Name: Richard S. Davis

Position: President

e-mail address: rsdavis@researchcouncil.org

Staffing:

Research Staff:

2

Total Staff:

3

Size of Budget (in general terms): \$400,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Growth management – “smart growth” – jobs/housing balance
2. Business Climate
3. State budget
- 4.
- 5.

Organizational Developments:

1. Making increased use of interns to assist in research activity
2. Collaborating with other major business organizations on competitiveness/business climate issues
- 3.

Primary Success Stories from 2000-01:

1. Business climate work has received bipartisan and media recognition
2. Growth management and jobs housing balance research formed basis of several state and regional conferences
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Membership (70%), research contracts (30%)

Most Pleasant Surprise of 2000-01:

Softening economy has not hurt membership support to the degree anticipated.

Items on Research Agenda for 2001-02:

1. Smart growth
2. Competitiveness
3. Tax policy

GRA Agency Profiles

Name of Organization/Agency: West Virginia Research League

Primary Contact:

Name: Clifford G. Lantz

Position: President

e-mail address: wvrl1@aol.com

Staffing:

Research Staff: 1 + 2 part
2 from WVSC Business & Economic faculty

Total Staff: 1

Size of Budget (in general terms): \$100,000 - \$150,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Taxation – State Revenue Projections
2. Economics – Impact of Selected Natural Resources/”Environmental Surveys”
3. Education – Higher Education Policy
4. Health – Surveys for Community Council/United Way
5. Statistics – WV Handbook: comparisons

Organizational Developments:

1. Use of WV State College business/economics faculty as Research Staff
2. League “housed” on WV State College campus
- 3.

Primary Success Stories from 2000-01:

1. Efficient/economic use of Community Council funds through WVRL studies
2. WVRL “staffed” Legislative Finance Committees’ research needs
- 3.

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

League founding & contributing memberships; corporate foundation grants; contracts, study sales, interest

Most Pleasant Surprise of 2000-01:

Items on Research Agenda for 2001-02:

1. WVSC Land Grant Program Support: County Economic studies
2. WV Legislature: State Revenue Projections; study of new tax sources
3. WVRL Statistical Handbook – 2001 (31st edition)

GRA Agency Profiles

Name of Organization/Agency: Public Policy Forum (Milwaukee)

Primary Contact:

Name: Jeff Browne

Position: Vice President

e-mail address: PPF@execpc.com

Staffing:

Research Staff:

5

Total Staff:

7

Size of Budget (in general terms): \$500,000

Primary Research Foci/Activities of 2000-01:

Research:

1. Education Reform -- Several grant-funded projects
2. Housing Segregation by Race and Income
3. Crime Incidence and Perception
4. Making Work Pay for the Working Poor
- 5.

Organizational Developments:

1. Increased staff by one full-time researcher and two part-timers
2. Created an endowment using a matching grant from a local foundation
- 3.

Primary Success Stories from 2000-01:

1. Obtained several multi-year grants to study school reform in Milwaukee
2. Obtained a book-publishing contract
3. Conducted research on taxation that contributed to federal and state legislative proposals and conferences on the working poor and economic development in Wisconsin

Funding Sources (e.g., memberships, endowments, dinner/lunch speakers, etc.):

Increasingly grant-funded. Other sources: Memberships, annual awards luncheon fundraiser, contract research

Most Pleasant Surprise of 2000-01:

We got considerable media attention that we did not anticipate for some of our routine reports.

Items on Research Agenda for 2001-02:

1. A report card on Milwaukee County's parks
2. Analysis of the impact of reducing busing at Milwaukee Public Schools by returning to neighborhood schools
3. Public and private school accountability