



Report to the Community

2016



## MISSION



*Policy Matters Ohio, a nonprofit policy research institute, creates a more vibrant, equitable, sustainable and inclusive Ohio through research, strategic communications, coalition building and policy advocacy.*



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Dear friends;

A friend calls me “the passionate wonk” and I confess to both. Sure, my day job consists of devouring statistics, editing reports or working with our great staff and partners to fund schools or green cities. But the wonky parts of the work are all part of a larger quest to make Ohio more sustainable, more inclusive, more equitable. And I’m grateful to you for making it possible.

Hanging over my desk are a dozen or so quotes that inspire, amuse, or just keep me plugging away. One recent addition may be the oldest of all, a mash-up of thoughts from ancient sources: “Do not be daunted by the enormity of the world’s grief. Do justly, now. Walk humbly, now. Love mercy, now. You are not obligated to complete the work, but neither are you free to abandon it.”

The work is sometimes daunting. It’s a marathon but each step along the way makes a difference. Making sure many thousands more Ohio families get help with childcare or pre-K is a step. Helping more low-income Ohio students pay for college is a step. Being one of many groups that got \$1.5 billion restored to our communities’ public schools is a step. Each of those changes was something that you supported and that one of our phenomenal researchers wrote about, built coalitions around, and worked with allies to win.

We haven’t completed the work and we definitely won’t abandon it. We have amazing funders who agree that our staff does magic with limited resources. We have terrific allies: young people forging their way in this tough economy, scrappy advocates fighting for great libraries and social services, dedicated parents seeking to give their children the brightest futures. And we have a staff of passionate wonks who wake every day ready to deliver on our vision of an economy that works for all of us: one report, one press release, one legislative meeting at a time.

This report fills you in on some of our recent fights and triumphs. Thank you for supporting this work. We simply couldn’t do it without you.

*Best, Amy Hanauer, Executive Director*



Dear friends;

When I retired as executive director of the George Gund Foundation in 2003, I vowed to focus on photography, gardening, and spending time with the young people in my life. But there was one organization I had to stay involved with: Policy Matters Ohio.

The Gund Foundation gave Policy Matters its first foundation grant in 2001 and it’s one of the best investments we ever made. The staff is as hard-working as they come and they get results, often from policy makers who don’t agree with them.

Their research, communications, strong coalition-building and fierce advocacy shift the conversation. The work garners excellent press coverage everywhere from the *Toledo Blade* to the *New York Times*. Their staff spearhead great partnerships to protect workers, lift poor children, and help families. They make policy better for those who can’t hire lobbyists – students, workers seeking the next rung on a career ladder, families in our inner cities and in forgotten pockets of Appalachia.

A story illustrates the point. One Cleveland mother we interviewed finished community college and got a job offer at \$11.89 an hour – giving her an annual salary (\$24,765) just over the state cutoff for help with childcare for her two toddlers. Without aid, she’d have so little left after childcare bills that she couldn’t cover rent, food, and other essentials.

With help from allies like you, Policy Matters improved eligibility so her family could get help. Our groundbreaking report described the problem; we partnered with advocates, businesses and parents; and we forcefully worked with lawmakers from both parties.

Now more employers can find workers and more babies are well cared for while their parents work. But Ohio remains the ninth-stingiest state for childcare. That’s not good enough. Policy Matters continues, with your support, to fight for childcare and other basics that let families, neighborhoods and businesses thrive.

We hope you enjoy this report on our last year of activity. You help Policy Matters win better jobs and stronger communities. We’re grateful for your partnership.

*Sincerely, David Bergholz, Board Chair*



# Policy Matters 2015 - at a glance

Improved Ohio policy to ensure more childcare, better senior services, stronger school funding, more financial aid, and more support for working families.

**> 150**

published reports, testimonies, and blogs that generate discussion about how to create an Ohio economy that works for all of us.

**> 100**

presentations in schools and community centers, at national conferences and local meetings, and even at a TEDx event.

**> 400**

television, radio and print stories about our work and a growing presence on social media.



Launched Policy Matters blog.



Built and supported coalitions that promote great public services, support pathways out of poverty, fight for sustainable communities, and push for a fair economy.



**AMY HANAUER**



Amy Hanauer giving a TEDx talk. (top)

Hannah Halbert (fourth from left) poses with Senator Sherrod Brown and the Ohio Workforce Coalition. (bottom)

*Policy Matters exposes and blocks bad policy while pushing good policy forward. In 2015, Policy Matters worked toward fair taxes, good jobs, worker rights, smart training, and opportunity for all.*

### **PROTECTING BENEFITS YOU'VE PAID FOR:**

In November 2015, we learned about House Bill 394 – an assault on unemployment compensation that would make our system one of the stingiest in the country. The bill was initially fast-tracked but we raised concerns and worked with coalition partners to generate media outrage and reverse momentum on the bill, which is now being reworked.

### **STOPPING WAGE THEFT:**

Working with phenomenal allies at the Cincinnati Interfaith Workers' Center, we provided testimony and research support to Ohio's first municipal ordinance protecting workers from employers who don't follow labor law. Low-wage and immigrant workers in particular can be victims of labor law violations when they are paid less than the minimum wage, not paid overtime, or not paid for all of the hours they work.

### **BETTER WAGES:**

Our research on how raising the minimum wage would assist workers helped spur grassroots campaigns to consider higher minimum wages. The research builds toward a future statewide effort that labor and community leaders want to spark.



Amy Hanauer speaking on the State of Working Ohio on The Ohio Channel. (top)  
Kalitha Williams at a press conference about the Earned Income Tax Credit. (bottom)

*Policy Matters promotes adequate and fair taxes to support the schools, neighborhoods, communities, and infrastructure we all need.*

**A BETTER BUDGET:**

We put forth a people-centered, community-centered vision of where investment is needed. A *Budget That Works* describes funding needed to support Ohioans in the slow recovery, setting a tone for what advocates should request. Our post-budget summary of changes looks back over the decade, helping coalition partners understand long-term evisceration of funding.

**STRONG INFRASTRUCTURE:**

Our research on attacks on local government funding helped lead to no further cuts and a slight increase to libraries.

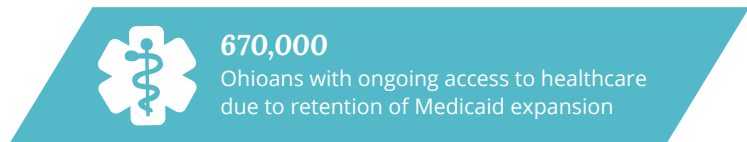
**FUNDED SCHOOLS:**

Our work helped bring \$1.5 billion more in funding to Ohio’s public schools, an 8% increase in the two-year budget for 2016 and 2017 compared to the prior two-year budget period. Legislators also put in place new rules for accountability in charter schools, something Policy Matters has researched and put on the agenda since 2010.



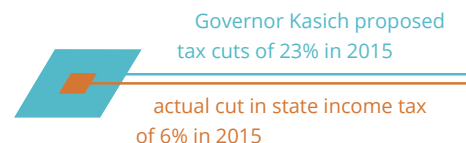
**HEALTHY OHIOANS:**

In 2015, the executive budget proposed reducing Medicaid coverage for prenatal care, breast and cervical cancer treatment, and family planning for some poor women. Policy Matters joined others in strong protest. By the end of budget discussions, eligibility was restored for the cancer treatments and prenatal services (though not for family planning). Struggling seniors will see the first significant increase in over two decades for adult protective services, funding of \$2.6 million a year. Based on our analysis of needs, a coalition continues pressing for \$20 million a year. Finally, 670,000 Ohioans now have ongoing access to healthcare because the legislature retained Medicaid expansion, something we and many others supported with strong analysis.



**SMART, PROGRESSIVE, FAIR TAXES:**

We scored defensive and offensive wins on fair taxes in a tough climate. Governor Kasich proposed an income tax cut of 23% in 2015. Our strong analysis framed the discussion and in the end, he got less than a third of that—about a 6% cut in the state income tax. The Governmental Accounting Standards Board for the first time will require state and local governments to publish costs of some tax breaks, a big positive that we suggested. The House also unanimously passed a bill creating a permanent review committee to regularly examine Ohio’s 128 tax breaks. This progressed further than past attempts and Policy Matters is the main analytical voice behind it.



*Policy Matters supports investments in transit, renewable energy, conservation and other smart solutions that create jobs and support communities.*

### **WEATHERIZATION:**

Weatherizing homes creates jobs now, reduces energy use, lowers utility bills, and improves our housing stock. Our 2015 research showed how Ohio's freeze of its energy-efficiency standards reduced home weatherization. We suggested ways to get back with the program.

### **FRACKED-UP DEBATES:**

When Donald Trump claimed in an October 2015 Republican debate that Ohio's economy was soaring because of fracking, we nearly choked on our popcorn. Our clarification (our economy isn't soaring and fracking isn't helping) gained us national coverage in a Politifact story on this fracked-up claim.

### **TRANSIT:**

For years, we've done research showing how Ohio underinvests in mass transit, putting us in the bottom five nationwide in state resources devoted to transit. Now our friends at the Ohio Organizing Collaborative have launched a Cleveland transit coalition to advocate better transit policy.

### **GREENER COMMUNITIES:**

Two of our fabulous summer interns released studies showing how investing in transit and in greening blighted properties could improve our communities and create jobs. We're happy to be shaping the next generation of researchers who are using their analytical skills to articulate a better vision for Ohio.



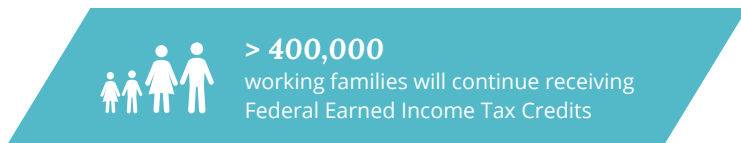
Cincinnati Bike Share Program



*Policy Matters suggests reasonable regulations to help families earn and save, build assets, avoid unfair loans, and build a better future for themselves and their children.*

**EARNED INCOME TAX CREDIT (EITC):**

Policy Matters Ohio runs Ohio’s Creating Assets, Savings and Hope (CASH) coalition. Together with Ohio CASH members, we led Ohio’s efforts in the successful national campaign to make the federal EITC and child tax credit improvements permanent. This included Congressional meetings, phone calls, letters, op-eds, and social media work. Over 400,000 Ohio working families will continue to receive credits that help them take care of their basic needs because of this amazing policy win, which Ohio’s Senator Sherrod Brown helped lead. Policy Matters also helped launch the 2015 Ohio Free Tax Services Map, an interactive map that featured over 330 sites where low-to-moderate income Ohioans could get their taxes filed free of charge.



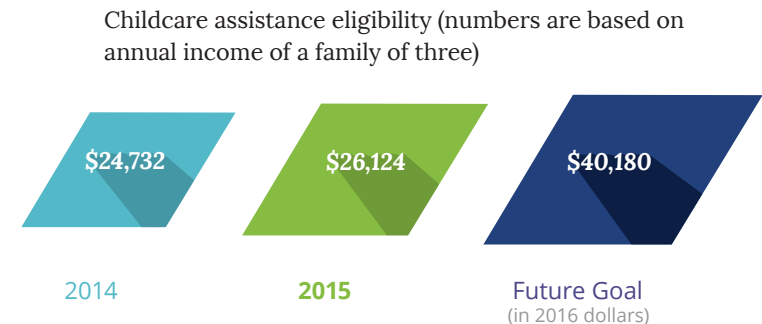
**UNDERSTANDING FAMILY NEEDS:**

Policy Matters released the Family Resource Simulator in partnership with Columbia University’s National Center for Children in Poverty. This online tool shows how work supports such as childcare assistance or EITC can make a difference in an Ohio family budget.

**AFFORDABLE CHILDCARE:**

Childcare expenses can make it impossible for some low-income parents to work or to save much money if they do work. In 2014 in Ohio, families earning more than 125% of the poverty level were unable to initially qualify for assistance with childcare, making us the sixth-worst state in the country. That meant a parent of two who earned more than \$24,732 could not have gotten help!

Policy Matters described this issue in a groundbreaking report. In response, the legislature raised eligibility slightly (to \$26,124 for a family of three) and made some other positive changes. We continue to work with advocates in Cleveland, Columbus and the Mahoning Valley to win further improvements – we hope eventually to secure assistance for families of three earning up to about \$40,000 (in 2016 dollars).



**REGULATING PREDATORY LENDING:**

Ohio CASH, and its coalition of advocacy organizations, led several activities supporting a strong rule to regulate payday lending. Last April the Ohio House tacked on an amendment to their version of the budget that would have expanded payday lending in Ohio. Ohio CASH met with several members of the Senate Finance Committee to raise concerns and lawmakers removed the provision.

## 2015 BOARD OF DIRECTORS

Harriet Applegate, *Vice Chair*  
 David Bergholz, *Chair*  
 Stephen Crowley  
 Susan Helper  
 Yvonne Hunnicutt, *Secretary*  
 Bakari Kitwana  
 Kamla Lewis  
 Renuka Mayadev  
 Kirk Noden, *Treasurer*  
 Earl Pike

Jeff Rechenbach  
 Pari Sabety  
 Baldemar Velasquez  
 Graham Veysey  
 Doug Wang

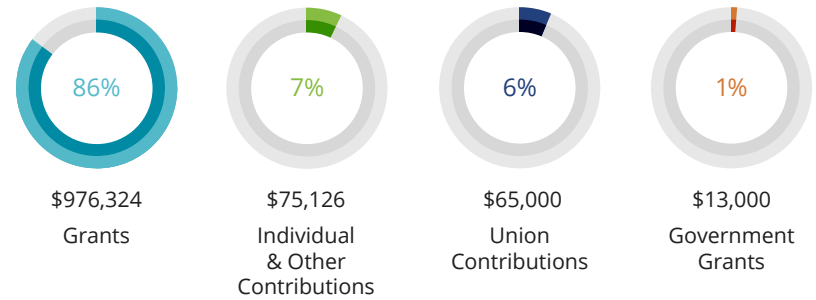
## POLICY MATTERS OHIO STAFF

Cynthia Connolly  
*Resource Development Manager*  
 Hannah Halbert  
*Policy Liaison*  
 Amy Hanauer  
*Executive Director*  
 Victoria Jackson  
*Research Fellow*  
 Daniel Ortiz  
*Outreach Coordinator*  
 Wendy Patton  
*Senior Project Director*  
 Zach Schiller  
*Research Director*  
 Sybille Schomerus  
*Office Manager*  
 Michael Shields  
*Researcher*  
 Harlan Spector  
*Communications Director*  
 Kalitha Williams  
*Policy Liaison*  
 Amanda Woodrum  
*Researcher*

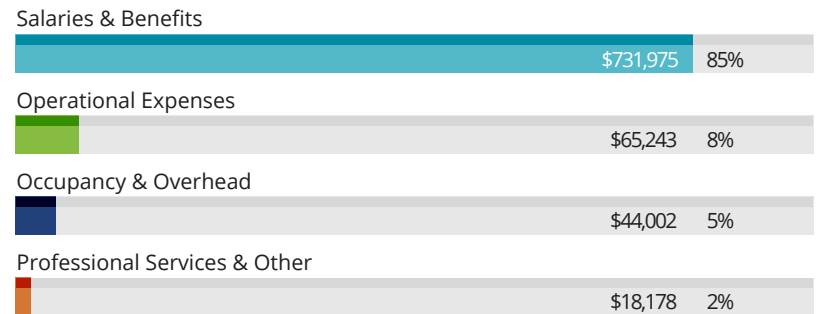
## 2015 INTERNS

*Winter/Spring 2015*  
 Brant Duda  
 Madeleine Kim  
 Kathleen Shaver  
 Michael Vrabel  
 Sam Whipple  
*Summer 2015*  
 Marcia Brown  
 Jackson Garrity  
 Connor Lang  
 Max Mauerman  
 Spencer Murray  
 Lucki Ratsavong  
 Andrew Slivka  
 Nate Steinberg  
 Tabitha Wilbur  
 Sophia Zupanc  
*Fall 2015*  
 Stacey Slagle  
 Nathan Weems, Esq.

## 2015 FINANCIALS



Total Revenue: \$1,129,450



Total Expenses: \$859,398

*We are very grateful to the following individuals for joining Policy Matters in our important work in 2015. With you by our side, we will continue to fight for an economy that works for all.*

Anonymous  
Susan Alcorn  
Richard and Sherry Aronson  
David Ashenhurst  
Herbert Asher  
Roldo Bartimole  
David Beach & Constance Magoulias  
David Bergholz  
Ronald & Annamarie Blanton  
David Blatt  
Yvonne Bolitho  
Rebecca Brady  
Barbara Brothers & Lawrence Haim  
Kathryn Brown  
Jane Buder Shapiro  
Paul Burstadt  
Linda Butler and Dr. Steve Nissen  
Beth & Steve Cagan  
Rachel Cahill  
Gerald Carlisle  
Matthew Carroll and Laura Kleinman  
William Cassell  
James Ciocia  
Mitsi Wagner & Gary Claxton  
Ruth Clevenger  
Vivienne & Thomas Conlon  
Cynthia & Joseph Connolly  
Will Cooley  
Kellie Copeland  
Mary Costello  
Anthony Coyne  
Neal Crandall  
Stephen Crowley  
Randy Cunningham & Tristine Roberts  
Diana Cyganovich  
James Darr  
Cynthia Demsey

William & Mary Denihan  
Wendy Deuring  
Henry Doll  
James & Linda Donovan  
Marcia A. Egbert  
Thomas Egelhoff  
Brian & Robin Eisen  
Kathleen Engel & James Rebitzer  
Jackie & Anthony Evangelista  
Mike Foley  
David Forgatsch  
Mark Freeman  
Emily & Peter Geier  
Joyce Goldstein  
Jennifer & Robert Gross  
Tom Hagesfeld  
David Hammack  
Patricia Hammel  
Joseph Hammond  
Cathi Hanauer  
Lonnie & Bette Hanauer  
Seven Harris  
Roberta Hendrick  
Ann Henkener  
Doris Honsa  
Chris Howell  
Adelbert Jenkins  
Sherri Jones  
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Hung-Ying Kao  
Eric Karolak  
Eugene King, Esq.  
Steven Lauer  
Julia Lauritzen  
Karen Leith  
Marcia Levine  
Kamla Lewis  
Steven Lieber  
Gail Long

Sarah Lowry  
Marci Lu  
Linda Malicki  
Keith & Joan Mathews  
Renuka Mayadev  
Joan McGuire  
Louise & Edward McKinney  
Eben "Sandy" McNair  
Donald McPherson  
David and Sarah Megenhardt  
Shuray Merriweather  
Benjamin Miladin  
Ariel & Huxley Miller  
Jeffrey Miller  
Juan Molina Crespo  
Robert Moore  
Lana Moresky  
John Moss  
Patricia Moss  
Susannah Muskovitz  
Anita Myerson  
Christopher Napierala  
Kirk Noden  
Betsie Norris  
Mary Ellen Nose  
Mary O'Shea  
John & Carolyn Olive  
Louisa Oliver  
Col Owens  
Averil Paskow  
David Patton  
Richard Peery  
Eleni Pelecanos-Matts  
Elizabeth Perl  
Jane Peterson & Philip Star  
Diana Petrauskas  
Raymond Pianka  
Earl Pike & Elizabeth Klein  
MaryAnn Player  
Liz Powell  
Thomas & Theresa Pretlow  
Gay Quereau  
Robert & Judith Rawson  
Norman Robbins  
James Rokakis

Joy Roller  
Reginald & Barbara Routson  
Pari Sabety  
Sybille Schomerus  
Dallas Schubert  
William & Dallas Schubert  
Connie Schultz  
John & Ann Schuster  
Christine Seibert  
Annette Severiens & Brett Himes  
Gregory Shaughnessy  
Charles Sheketoff  
John Sherburne  
James Shin  
Fareed Siddiq  
Pat Simons  
Michael Smalz  
Catherine Smythe Zajc & John M. Zajc, Jr.  
Judy Spring  
Frances Strickland  
Nicole Thomas  
Carol Toutant  
Meryl Johnson  
Annette Tucker Sutherland & Mark Sutherland  
John Ursu  
Piet van Lier & Martha Loughridge  
Judith & Howard VanKleef  
Douglas & Holly Wang  
Mary Warren  
Anita Waters  
Thomas Weeks & Elisabeth Copley  
Sharon Weitzenhof  
Richard Werner & Barbara Langhenry  
Maria Wilkinson  
Christine Williams & Kenneth Frisof  
Miranda Wilson  
Warren & Anne Marie Wolfson  
Wojbor Woyczynski  
Judy Wright and Mr. Walter Wright  
Suzanne Zaranko  
Jill Zimon  
Stephen Zinn  
John Zipp

*Policy Matters Ohio would like to thank the following organizations, who in 2015 made our work possible through generous financial contributions and ongoing support. We are grateful for your partnership.*

AFSCME Council 8	Higley Fund
AHS Foundation	International Brotherhood of Electrical Workers
Big Fun	Keystone Research Center
Bruce and Erica Greer Family Foundation	Lonnie and Bette Hanauer Charitable Fund
Center on Budget and Policy Priorities	Mahoning Valley Organizing Collaborative
Chandra Law Firm, LLC	Mt. Sinai Health Care Foundation
Char and Chuck Fowler Family Foundation	NextGen Climate America, Inc.
Charles M. & Helen M. Brown Memorial Foundation	Oberlin College
Cleveland Foundation	Office of Cuyahoga County Executive
Columbia University - National Center for Children in Poverty	Ohio Alliance for Retired Americans Educational Funds, Inc.
Communication Workers of America	Ohio Association of Public School Employees
Community Shares of Mid Ohio	Ohio Civil Service Employees Association
Consumer Federation of America	Ohio Education Association
Doll Family Foundation	Ohio Federation of Teachers
Economic Policy Institute	Ohio Organizing Collaborative
Ed Fire Advocacy Fund - Patriots for Change	Podl Family Fund
Elana Steinberg Fund	R. Strategy Group LLC
EMA Foundation	Raymond John Wean Foundation
Emerald Cities Collaborative, Inc.	Richard Shatten Memorial Fund
Enterprise Community Partners	Saint Luke's Foundation
Environmental Health Watch	United Auto Workers
Ford Foundation	United Way of Greater Cincinnati
George Gund Foundation	Women's Fund of Central Ohio
Greater Cleveland Community Shares	Working Poor Families Project

*Thank you!*

Creating an economy that works for  
*...everyone*

Vibrant  
Inclusive  
Equitable  
Sustainable



[policymattersohio.org](http://policymattersohio.org)

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3631 Perkins Avenue, Suite 4C-East  
Cleveland, Ohio 44114  
216.361.9801

125 East Broad Street, 4th Floor  
Columbus, Ohio 43215  
614.221.4505