

# 2018 ANNUAL REPORT



Florida  
**TaxWatch**



# ABOUT FLORIDA TAXWATCH

As an independent, nonpartisan, nonprofit taxpayer research institute and government watchdog for nearly 40 years, it is the mission of Florida TaxWatch to provide the residents of Florida and public officials with high quality, independent research and analysis of issues related to state and local government taxation, expenditures, policies, and programs.

Florida TaxWatch works to improve the productivity and accountability of Florida government. Its research recommends productivity enhancements and explains the statewide impact of fiscal and economic policies and practices on residents and businesses.

Florida TaxWatch is supported by voluntary, tax-deductible memberships and private grants, and does not accept government funding. Memberships provide a solid, lasting foundation that has enabled Florida TaxWatch to bring about a more effective, responsive government that is more accountable to, and productive for the residents it serves since 1979.

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# FOUR DECADES OF LEADERSHIP



DAVID  
MANN

CHAIRMAN  
2016-2018

**NEARLY 40 YEARS AGO**, a small group of Florida's business and elected leaders joined together to form an independent entity that could be trusted to look out for the interests of the taxpayers. Throughout that time, some of Florida's most respected and influential private sector leaders have called the Chairman's role theirs, and it has been a profound honor to have spent two years in their shoes.

My tenure as the Chairman of the Board of Florida TaxWatch came to an end this year, but I believe that the work done over the past two years has helped to build a foundation that will enable this organization to last well into the future.

Every nonprofit organization is measured first by the impact of its work. Long thought of only as a "public policy think tank," Florida TaxWatch has expanded what a policy-focused organization can do in a wide variety of areas.

Whether through the ability to take what began as a principal recognition program and instantly transform the lives of 9 incredibly resilient students a year, or providing up-and-coming business leaders with an immersive education in all things government, or spearheading a nearly 30-year program that recognizes hard-working, innovative state employees for their work on behalf of taxpayers, I am incredibly proud of the work of this organization.

As I step aside and welcome Senator Pat Neal to the Chairman's role, I know that I am leaving TaxWatch in highly capable hands, and I am excited to see what the next two years holds for us all. Thank you for the honor of being your Chairman.

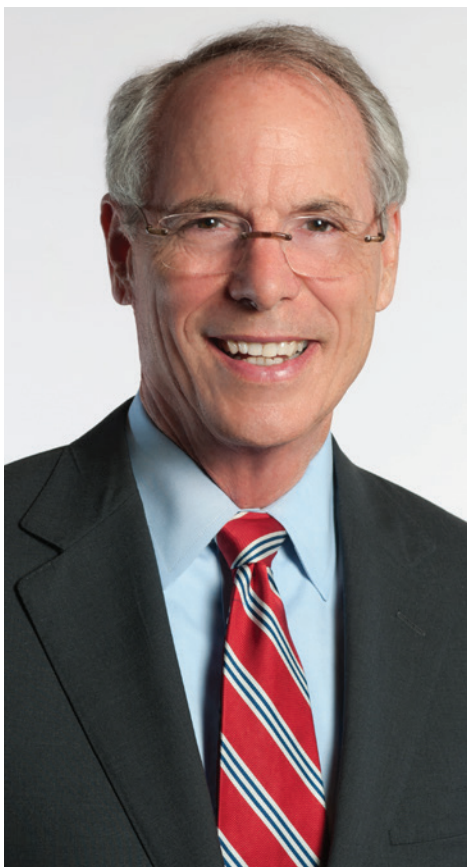
Respectfully,

A handwritten signature in black ink that reads "David Mann".

David Mann

*Chairman of the Board of Trustees*  
2016-2018

# LEADING THE STATE THROUGH CHANGE



## SENATOR PAT NEAL

CHAIRMAN  
2018-2020

**MY TERM AS CHAIRMAN OF FLORIDA TAXWATCH** begins as the state is welcoming a significant change in leadership: seating a new Governor and Cabinet for the first time in nearly a decade, three new Supreme Court Justices, and countless new elected officials at every level of government. I am excited to see younger Floridians beginning to get involved in their government at a level rarely seen in our nation, and our neighbors that have never run for office put themselves out there and volunteer to lead. With all of these changes, it is an exciting time to be leading Florida TaxWatch.

I am a builder by trade. I know that every good structure begins with a solid foundation, and as I begin my term as Chairman, I am encouraged by the foundation that I see before me.

TaxWatch is respected, we are impactful, and our opinion matters. Our consistency and expertise over the past 40 years have put us in a position to walk into any board room, community center, or office in the Capitol and have our recommendations taken seriously. This new generation of leadership will be looking to experienced voices like ours to educate them, to show them the best path, and to know what we know.

My term will focus on strengthening that foundation, building organizational resilience through a more active and engaged membership, and perhaps most of all, working with the new administration and new leaders across the state to implement new ideas that will make Florida an even better place to call home.

I am honored to serve in this important role, and I look forward to working with each and every one of you.

Respectfully,

A handwritten signature in black ink, appearing to read "Pat Neal", with a checkmark-like flourish at the end.

Senator Pat Neal

*Chairman of the Board of Trustees*  
2018-2020





CHAIRMAN-ELECT SENATOR PAT NEAL (LEFT) AND  
CHAIRMAN DAVID MANN AT THE 2018 ANNUAL MEETING

# SELECTED 2018 ACCOMPLISHMENTS

## AMENDMENT 1 DEFEATED

Amendment 1, placed on the ballot by the Legislature in an attempt to provide additional tax relief for Floridians, was misguided from the start.

As was the case in 2008, the Legislature's goal of providing property tax relief focused only on homestead property would further exacerbate Florida's already unequal property tax system. Instead of providing widespread relief, this amendment would have applied to only 24% of all properties statewide, and only 29% of all Florida families.

TaxWatch efforts to show the inequity of this proposed amendment helped to keep it from reaching the necessary 60% threshold to pass.

## AMENDMENT 2 PASSED

Originally passed by voters in 2008, the non-homestead property tax cap is the only protection non-homestead property has from annual increases of more than 10%, and was the only provision of the 2008 reforms that was not made permanent initially.

In the months leading to the November election, TaxWatch went to work to ensure that the potential \$700 million tax increase from the amendment's failure would not be felt across the Sunshine State.

As with Amendment 1, property tax relief in Florida has almost exclusively benefited homestead property, and it was vital that TaxWatch educate voters about the importance of keeping this protection in place for non-homestead property.

## AMENDMENT 5 PASSED

Even though there has not been a major state tax increase since 2009 and the Legislature has instead cut taxes in every session since then, the constitutional imposition of a well-crafted supermajority requirement is still an important taxpayer safeguard.

Florida TaxWatch has historically recommended a three-fifths standard, but history has shown that the two-thirds requirement in Amendment 5 is certainly attainable if there is a compelling need for new revenue.

One of the highlights of the 2018 Voter Guide, Amendment 5 was a strong priority for TaxWatch in 2018, and our outreach efforts, including a number of in-person speaking engagements to support its passage, were able to reassure voters that Yes was the right choice.

## TAXPAYER ADVOCATE REFORMED

When Florida TaxWatch chaired the Taxpayers' Bill of Rights Task Force and helped create the Taxpayers' Bill of Rights, one important measure was the Taxpayer Advocate. Over time, it became clear that the Advocate was in need of reform to make the office a more independent resource for Florida taxpayers.

TaxWatch research led the 2018 reforms, as an independent advocate can help ensure that it is truly advocating for the taxpayer. In addition, the reporting requirement in the new law can help ensure that taxpayer complaints are properly addressed and can make the advocate a true sounding board for taxpayers, leading to improvements in the administration, fairness, and uniformity of Florida's tax collection system.

# TAXWATCH RESEARCH

**FOR FLORIDA TAXWATCH IN 2018**, the focus was largely on citizen education. Not only did we continue to publish our highly successful pocket guides *How Florida Compares: Taxes*, *How Florida Counties Compare*, and the *Taxpayers' Guide to the Florida State Budget*, but the 2018 election brought an increased focus on preparing Floridians and their newly elected leaders to take ownership of the direction of the Sunshine State.

In addition, our education research and activities provided what may be the most meaningful impact any organization can hope to achieve: transforming the lives of children who are the most in need.

Florida TaxWatch covered a number of areas this year, and the following represents the highlights of that work. For a more complete list of our research in 2018, please see the Selected Research section in the back of this book, beginning on page 29.

## **AMENDMENTS & THE VOTER GUIDE**

This year's election season brought with it what could aptly be described as an onslaught of decisions for voters, with 12 proposed constitutional amendments on the ballot in addition to a US Senate race, the full slate of the Florida Cabinet, the standard Florida Senate, House, and US House races, and more. Luckily for voters, TaxWatch had their back on the Amendments.

The release of stand-alone reports on the top two TaxWatch priority amendments (numbers 1 & 2) set the stage for what became the definitive guide to the 2018 ballot. Amendment 1, which increased the homestead property exemption by an additional \$25,000, was opposed by TaxWatch, and ultimately was the only amendment that did not win the support of the voters.

Amendment 2, our top priority for the year, was the focus of a months-long outreach effort, which showed the reach and authority of the TaxWatch brand. Throughout the state, TaxWatch experts gave presentations to groups of various sizes, worked with partner organizations to distribute fact sheets about the impact of the amendment failing to pass, and our increased social media presence allowed us to cast a wider net. Additionally, a three-minute video was created to explain to voters what Amendment 2 was, and what it meant to them. This video was shared across social media platforms by TaxWatch and our partners, and ultimately became the most-viewed video ever produced by Florida TaxWatch. All of this work undoubtedly had an impact on the ultimate decision of voters to pass Amendment 2.

As for the rest of the amendments, the 2018 Voter Guide provided voters with detailed breakdowns of each and every amendment on the ballot, what a yes or no vote would mean, and recommendations on each amendment. In addition to a pull-out sheet at the back of the book that let voters take our recommendations with them to the polls, a series of videos was created to showcase the knowledge and expertise of TaxWatch staff, breaking down each amendment in a conversational setting. These videos were viewed by thousands of voters leading up to election day.

## **GOVERNOR'S TRANSITION DECISION HANDBOOK**

The other major publication of 2018, produced in close collaboration with Steering Committee Chairman Governor Bob Martinez, represents the very essence of one of the roles that Florida TaxWatch embodies: that of the government's guide dog.



GOVERNOR BOB MARTINEZ SIGNS THE POSTER-SIZED COVER OF THE GOVERNOR'S TRANSITION DECISION HANDBOOK FOLLOWING A PACKED NEWS CONFERENCE AT THE TAXWATCH HEADQUARTERS

The document includes nearly 60 pages of detailed background, research, and recommendations for the new Governor, as well as letters from past Governors, Lieutenant Governors, and other senior elected officials giving the new head of the state a wealth of information to consider when making the transition to his new office.

### **CITIZENSHIP INSTITUTE**

This year saw the graduation of the third class of the Florida Citizenship Institute, a multi-phase leadership training program focused on Florida's young business leaders. The Institute focuses on preparing the participants to engage with local and state government in an informed, effective manner. Through hands-on workshops with current and former agency leaders, legislators, and the close involvement of Governor Bob Martinez and other high-profile TaxWatch volunteer leaders, graduates gain an understanding of the intricacies of the process and structure of government that were previously available only to those working in the process. For more information on the Citizenship Institute, see page 17.

### **TRANSFORMATIONAL LEADERSHIP**

Now in its sixth year, the TaxWatch Principal Leadership Awards (PLA) Program continues to be one of the highlights of each year at Florida TaxWatch. The PLA Program annually identifies Florida's most effective principals in high-risk K-12 public schools (three elementary principals, three middle school principals, and three high school principals), recognizes and rewards their work, and promotes their transformational practices throughout the state. The goal of the program is to improve student performance in high-risk schools, thereby closing the achievement gap.

In 2018, through a partnership with the Florida Prepaid College Foundation and SunTrust Banks, the program added the Academic A+ Scholarship Program, awarding one two-year prepaid scholarship to a student in each of our winning

principals' schools. The students eligible for the scholarship are nominated by the winning principals, and are required to meet several criteria designed to ensure that a two-year scholarship would be a life-changing event for every one of them.

Many of the scholarship students come from single-parent homes, live in poverty, or have incarcerated or deceased parents, but they all experience significant obstacles to academic success. In fact, one of the recipients in 2018 actually lived in the family car for a portion of the school year.

Of all of the programs and initiatives in which Florida TaxWatch is involved, the Academic A+ Scholarship Program may be the single most rewarding, and genuinely transformational. Thanks to the work of TaxWatch and our generous members and sponsors, students desperately in need will have access to the kind of educational opportunities that so many are able to take for granted.

### **THE BUDGET & BUDGET TURKEYS**

Grounded in nearly four decades of expertise in the state's budgeting process, TaxWatch continued the monthly series of Budget Watch publications, as well as possibly our most widely-known publication, the Budget Turkey Watch Report. The "Turkeys" were released again this year, reinforcing the role of TaxWatch as the watchdog for spending projects that did not receive the proper amount of public scrutiny.

The only organization in the nation that releases such a report, the Budget Turkey Watch report takes TaxWatch staff months to develop, has saved the taxpayers billions over nearly four decades, and has ruffled more than a few partisan feathers.

While the Budget Turkey Watch report can cause consternation among those at the highest level of politics, TaxWatch remains committed to serving in this important role and producing this publication each Legislative Session.

# TAXWATCH CENTER FOR COMPETITIVE FLORIDA

The TaxWatch Center for Competitive Florida analyzes policies and programs that affect Florida's economic and job growth, and makes policy recommendations that enhance Florida's ability to successfully compete in the global economy.

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U.S. ASSISTANT SECRETARY OF EDUCATION FRANK K. BROGAN CATCHES UP WITH FRIENDS AT THE TAXWATCH ANNUAL MEETING AFTER SERVING AS KEYNOTE SPEAKER

The Center's work is also supported by the **FLORIDA COUNCIL OF ECONOMIC ADVISORS AT FLORIDA TAXWATCH**, a group of nine prominent public and private economists from around the state, which is comprised of:

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## TAXWATCH CENTER FOR EDUCATIONAL PERFORMANCE & ACCOUNTABILITY

The TaxWatch Center for Educational Performance & Accountability addresses the profound fiscal and economic impact that PreK-20 education has on Florida's future, and makes recommendations to improve both the quality and cost-effectiveness of this essential public service.

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## TAXWATCH CENTER FOR FLORIDA CITIZENSHIP

The mission of the Center is to enable Florida voters to fulfill their responsibility as citizens by educating them on the activities, functions, and processes of their government, informing them on key issues through fact-based, nonpartisan research, and preparing them to participate.

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AT FLORIDA STATE UNIVERSITY

# TAXWATCH CENTER FOR GOVERNMENT EFFICIENCY

The Center for Government Efficiency believes that truly effective and efficient government is the result of three distinct operational goals, intricately woven together: the targeted investment of taxpayer dollars, effective governance, and the deliberate avoidance of unnecessary costs.

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# TAXWATCH CENTER FOR HEALTH & AGING

The Florida TaxWatch Center for Health & Aging conducts research and analysis of the fiscal and economic impacts of current and proposed policies across the health care and aging spectrum.

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# TAXWATCH CENTER FOR SMART JUSTICE

The Center's research focuses on evidence-based reforms to Florida's criminal and juvenile justice systems that ensure less crime, fewer victims, and no wasted tax dollars.

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JUDGE, 13TH CIRCUIT COURT (RET.)

Senator Stephen Wise  
FLORIDA STATE SENATOR

# SENIOR RESEARCH FELLOWS

The Senior Research Fellows assist and advise Florida TaxWatch with its research agenda. Each Fellow is a prominent scholar or professional of national repute chosen for his or her public policy analysis and evaluation expertise in the areas of state and local government accountability, finance, and taxation.

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Dr. Antonio "Tony" Villamil  
FOUNDER, WASHINGTON ECONOMICS GROUP



FLORIDA LOST A DEDICATED LEADER THIS YEAR WITH THE PASSING OF JOHN R. ALEXANDER, WHO WAS A HIGHLY ACTIVE AND RESPECTED MEMBER OF TAXWATCH VOLUNTEER LEADERSHIP



PLA GRAND PRIZE WINNER RENE ROVIROSA CELEBRATES WITH HIS WIFE AFTER ACCEPTING HIS AWARD AT THE 2018 AWARDS CEREMONY



PLA MIDDLE SCHOOL WINNER CARLOS GONZALEZ CELEBRATES WITH HIS FAMILY AFTER ACCEPTING HIS AWARD AT THE 2018 AWARDS CEREMONY



2017 PLA GRAND PRIZE WINNER CARLOS ALVAREZ (RED TIE) AND OTHER PLA WINNERS DISCUSS STRATEGIES FOR EFFECTIVE PRINCIPALS DURING THE PRINCIPAL LEADERSHIP ROUNDTABLE AT THE 2018 SPRING MEETING

# PRINCIPAL LEADERSHIP AWARDS

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Building on nearly four decades of serving Florida's taxpayers by improving government efficiency and taxpayer value in all areas of public policy, the Principal Leadership Awards program identifies Florida's most effective principals in high-risk K-12 public schools, recognizes and rewards their work, and promotes their transformational practices throughout the state. This unique initiative identifies principals around the state who have had the greatest impact on their students, in parts of the state where educational success can transform a community.

Unlike more common awards programs, our annual winners are not nominated by colleagues, or school boards, or superintendents. This awards program is Florida's only data-driven principal recognition initiative.

Additionally, through this program's *Academic A+ Student Scholarship Program* (a partnership with the Florida Prepaid College Foundation and SunTrust Banks), one deserving student at each winner's school receives a two-year prepaid scholarship to attend the Florida college of their choice.

## 2017-18 WINNERS

### ELEMENTARY SCHOOL

Ms. Dawn Massey  
FLOROSA ELEMENTARY SCHOOL

Ms. Erin Kelly  
IMAGINE ELEMENTARY AT NORTH LAUDERDALE

Ms. Margarete Talbert-Irving  
ORANGE CENTER ELEMENTARY SCHOOL

### MIDDLE SCHOOL

Mr. Carlos Gonzalez  
HIVE PREPARATORY SCHOOL

Mr. Ahmet Temel  
TALLAHASSEE SCHOOL OF MATH & SCIENCE

Ms. Renatta Espinoza  
ACADEMY FOR POSITIVE LEARNING

### HIGH SCHOOL

Mr. Ken Granger  
COTTONDALE HIGH SCHOOL

Mr. Rene Rovirosa  
MATER LAKES ACADEMY

Mr. Jeff Rexford  
LORENZO WALKER TECHNICAL HIGH SCHOOL



**TOP PRIZE WINNER—ELEMENTARY**  
PRINCIPAL MARGARETE  
TALBERT-IRVING



**TOP PRIZE WINNER—MIDDLE**  
PRINCIPAL AHMET TEMEL



**TOP PRIZE WINNER—HIGH**  
PRINCIPAL RENE ROVIROSA



GOVERNOR BOB MARTINEZ WITH THE GRADUATES OF CLASS III OF THE INSTITUTE, ALONG WITH CHAIRMAN DAVID MANN, CHAIRMAN-ELECT PAT NEAL, PRESIDENT & CEO DOMINIC M. CALABRO, AND VP OF RESEARCH BOB NAVE.

# THE FLORIDA CITIZENSHIP INSTITUTE

Being a Florida TaxWatch Citizenship Institute graduate is more than just a line on a resumé for these highly distinguished participants.

Graduates learn firsthand from Florida's most influential policy leaders and business executives how state and local government policies impact their community and their business, and the most effective ways to ensure that their voices are heard and respected. They also understand the key points, whether issues have federal, state, or local components, whether they are statutory or administrative regulations, and what the differences mean to their business.

## CLASS III GRADUATES

**Kyle Baltuch**  
FLORIDA TAXWATCH

**Devon Barnett**  
PASCO ECONOMIC  
DEVELOPMENT COUNCIL

**Jim Burleson**  
MEENAN, P.A.

**Brooke Bustle**  
FLORIDA TAXWATCH

**Barnette Diggs**  
VERIZON WIRELESS

**Katie Eastburn**  
KYRA SOLUTIONS, INC.

**Bethany Linderman**  
FLORIDA BLUE

**Jonathan Mann**  
AON RISK SOLUTIONS

**Josh McCoy**  
SUNTRUST BANK

**Brian Miller**  
ON STREET MEDIA

**Vrajesh Patel**  
KYRA SOLUTIONS, INC.

**Daniel Petronio**  
CAPITAL CITY BANK

**Evan Power**  
RAMBA CONSULTING GROUP

**Jamal Sowell**  
PORT TAMPA BAY

**Marilynn Vallori**  
VERIZON WIRELESS

**Eric Wingard**  
VERIZON

We did a lot of **GOOD** for the taxpayers this legislative session and **FLORIDA TAXWATCH WAS A BIG PART** of that. I appreciate all you do to ensure Floridians get the best return for their tax dollars.

— GOVERNOR RICK SCOTT

The contribution of Florida TaxWatch is **UNPARALLELED IN THE HISTORY OF FLORIDA GOVERNMENT**, and deserves the thanks of all the taxpayers of Florida.

— US SENATOR & GOVERNOR BOB GRAHAM

Thank you for playing a **CRITICAL ROLE** in policymaking and in guarding the public interest. The **TAXPAYERS OF FLORIDA ARE FORTUNATE** to have an advocate and friend in Florida TaxWatch.

— GOVERNOR JEB BUSH

TaxWatch is a **HIGHLY RESPECTED** organization.. well prepared to help our state **PROSPER** as it enters the next millennium.

— GOVERNOR LAWTON CHILES

Government must be **HELD ACCOUNTABLE** to taxpayers, and the work of Florida **TAXWATCH HELPS ACHIEVE** this goal.

— SENATOR BILL NELSON

...a **PREMIER TAX WATCHDOG** group, **RESPECTED** for its conservatism and fiscal frugality.

— LAKELAND LEDGER

What we've got in Florida TaxWatch is an **OLYMPIC-SIZED EFFORT** to make sure that public policy in the state of Florida is **SECOND TO NONE**.

— GOVERNOR BOB MARTINEZ

Florida TaxWatch is a testament to democracy in action...bringing a **VALUE-ADDED DIFFERENCE TO THE LIVES, HEALTH, AND PROSPERITY OF ALL FLORIDIANS** because of your constructive ideas and vision. Thank you for your **UNRELENTING EFFORTS** to safeguard the long and short-term interests of the citizens of Florida.

— GOVERNOR JEB BUSH

You are heroes to me for what you do in this state.

**WE COULD USE YOUR PENCILS, MINDS, AND COURAGE UP IN WASHINGTON.**

— U.S. SENATOR GEORGE LEMIEUX

...Fortunately for the legislators, **TAXWATCH** already has done much of **THEIR WORK FOR THEM.**

— ORLANDO SENTINEL

The state is undoubtedly more healthy and prosperous because TaxWatch has been on the job. It has been **AN HONEST WATCHDOG** in warning of abuses, **A CREDIBLE GUIDE DOG** in finding thrifty solutions to problems, and **A TIRELESS BIRD DOG** in making sure taxpayers get their money's worth.

— TAMPA TRIBUNE

**HEED  
TAXWATCH**

— MIAMI HERALD EDITORIAL HEADLINE



HEISMAN TROPHY WINNER CHARLIE WARD SERVED AS KEYNOTE SPEAKER FOR THE KICK-OFF CEREMONY IN TALLAHASSEE, AND TOOK QUESTIONS FROM ATTENDEES

# PRUDENTIAL PRODUCTIVITY AWARDS

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Even though the co-founders of the program, J.E. Davis and A.D. Davis, are no longer with us today, they would be proud to know that, since 1989, more than 16,000 nominations have been submitted totaling more than \$10.2 billion in cost-savings, cost-avoidances, and added value to the lives of Florida's residents and visitors, including this year's total of more than \$500 million.

This year's winners come from nearly every state agency in Florida, and include everyone from university professors, to transportation safety workers, to environmental engineers. Twenty seven years of this awards program has shown that Florida truly has the nation's best public employees, and we are excited to see what groundbreaking ideas and actions are still to come.

The distinguished members of the Panel of Judges donate their time for a thorough review and spirited discussion of the best of this year's achievements; and Governor Scott, Lt. Governor Lopez-Cantera, Cabinet members, agency heads, and civil service men and women of Florida continue to demonstrate extraordinary dedication to our great state and help improve the lives of Florida's citizens through their outstanding achievements.

The 2018 Productivity Awards brought an exciting new event format, which saw the Tallahassee kick-off ceremony take over the beautiful Ruby Diamond Auditorium at Florida State University for the evening. Winners and their guests were treated to a Q&A with keynote speaker Charlie Ward, the 1993 Heisman Trophy winner from FSU. Two regional ceremonies in Central and South Florida wrapped up the 2018 year, and major changes are in store for the program in 2019, which will represent the 30th anniversary of this nationally unique initiative.



TITLE SPONSOR PRUDENTIAL MIKE MCCANN (l) AND MICHAEL JENNINGS (r) JOINED US FOR THE KICK-OFF CEREMONY IN TALLAHASSEE

# STATE OF THE TAXPAYER DINNER

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As the trusted eyes and ears of Florida taxpayers for nearly 40 years, Florida TaxWatch embraces our responsibility to provide a forum for our state's elected leaders to speak directly to the interests of the taxpayers.

While the annual State of the State address and opening statements of each legislative chamber cover the accomplishments and future plans of our elected leadership, none specifically highlight the issues affecting taxpayers.

Florida TaxWatch and Host Committee Chairman Governor Bob Martinez presented the inaugural State of the Taxpayer Dinner in 2016, and followed its resounding success with sold-out events in 2017 and 2018.

Now the premier event for Florida's elected leaders to discuss the issues that will impact taxpayers over the next year, the dinner presents an all-star lineup of some of Florida's top policymakers addressing a capacity crowd, ensuring that as Legislative Session begins, the attention of Florida's leaders is where it belongs: on the taxpayers.



CHIEF FINANCIAL OFFICER JIMMY PATRONIS SPEAKS TO THE STANDING-ROOM-ONLY CROWD AT THE 2018 EVENT



FORMER ATTORNEY GENERAL PAM BONDI ADDRESSES THE AUDIENCE AT THE 2017 EVENT



(L TO R) TAXWATCH DIR. OF COMMUNICATIONS & EXTERNAL AFFAIRS CHRIS BARRY WITH JAMAL SOWELL, BRIAN MILLER, AND ERIC WINGARD AT THE SECOND SESSION OF THE FLORIDA CITIZENSHIP INSTITUTE, CLASS III

THE TRUSTED EYES & EARS  
OF FLORIDA TAXPAYERS



FLORIDA'S GOVERNMENT  
WATCHDOG SINCE 1979



THE TRUSTED EYES & EARS  
OF FLORIDA TAXPAYERS



THE TRUSTED EYES & EARS  
OF FLORIDA

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TAXWATCH TREASURER U.S. SENATOR GEORGE LEMIEUX INTERVIEWS CANDIDATE FOR ATTORNEY GENERAL, ASHLEY MOODY AT THE 2018 SPRING MEETING

FLORIDA'S GOVERNMENT  
WATCHDOG



THE TRUST  
OF FLORIDA

Florida  
Tax



Given with Appreciation To  
**BARNEY BARNETT**  
Florida TaxWatch Chairman's  
Outstanding Leadership Award  
Presented this 20th Day of April, 2018

WESLEY BARNETT HOLDS THE PHONE AS HIS FATHER, BARNEY BARNETT, ACCEPTS (VIA FACETIME) THE CHAIRMAN'S OUTSTANDING LEADERSHIP AWARD FROM TAXWATCH, PRESENTED BY COMMISSIONER ADAM PUTNAM

# VOLUNTEER LEADERSHIP

Florida TaxWatch has been fortunate over the past nearly 40 years to have a remarkable group of volunteer leaders guide the organization.

From former Governors, to United States Senators, to leaders of both chambers of the Florida Legislature, to the state's most influential and well-known private sector leaders, few organizations can boast the leadership roster of TaxWatch.

## TAXWATCH CO-FOUNDERS

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**Mr. T. Wayne Davis**  
TINE W. DAVIS FAMILY FOUNDATION

**Mr. Mark C. Hollis (1934-2012)**  
PRESIDENT, PUBLIX SUPER MARKETS, INC.

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**Sen. Kenneth A. Plante (1939-2015)**  
FORMER MIN. LEADER, FLORIDA SENATE

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2012-2014

**Mr. Marshall Criser, III**  
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2001-2003

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1992-1993

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1990-1992

**Mr. T. Wayne Davis**  
1981-1982, 1988-1990

**Mr. Tom L. Rankin**  
1986-1988

**Sen. Philip D. Lewis**  
1984-1986

**Sen. Kenneth A. Plante**  
1982-1984

**Mr. Mark C. Hollis**  
1979-1981

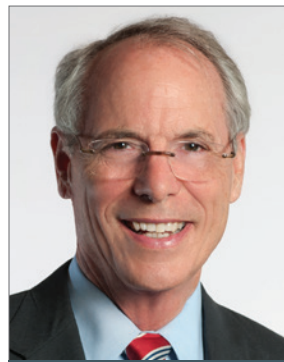
# OFFICERS



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DAVID MANN



**PRESIDENT & CEO**  
DOMINIC M. CALABRO



**CHAIRMAN-ELECT**  
SENATOR PAT NEAL



**TREASURER**  
SEN. GEORGE LEMIEUX



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**IMMEDIATE PAST CHAIR**  
MICHELLE ROBINSON

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ADAMS STREET ADVOCATES.

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**Mr. J. Charles Gray (Emeritus)**  
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HOLLAND & KNIGHT

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PUBLIX SUPER MARKETS, INC

**Mr. James M. Repp**  
AVMED HEALTH PLANS

**Ms. Michelle Robinson\***  
VERIZON

\*FORMER CHAIRMAN

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**Governor Bob Martinez**  
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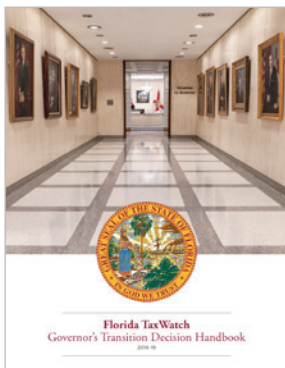
**Mr. Andrew Wright**  
FRANKLIN STREET FINANCIAL

**Lady Dhyana Ziegler**  
FLORIDA A&M UNIVERSITY



TAXWATCH VICE PRESIDENT OF RESEARCH BOB NAVE LEADS THE DISCUSSION OF THE TAXWATCH CENTER FOR EDUCATIONAL PERFORMANCE & ACCOUNTABILITY AT THE 2018 ANNUAL MEETING

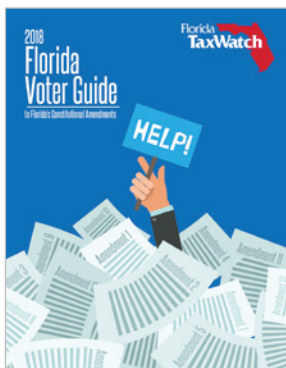
# SELECTED 2018 RESEARCH



## GOVERNOR'S TRANSITION DECISION HANDBOOK 2018-19

OCTOBER 30, 2018

The Handbook is, at its core, a compilation and translation of knowledge and experience from some of the people who have been through the extraordinary and unique endeavor which the new Governor is about to undertake, and a guide to the policy choices that will have to be made as the Governor of Florida.



## 2018 VOTER GUIDE

OCTOBER 4, 2018

On November 6, 2018, Floridians voted on 12 proposed amendments to the Florida Constitution. This Florida TaxWatch Voter Guide was designed to provide voters with information about each of the amendments to help them cast well-informed votes.

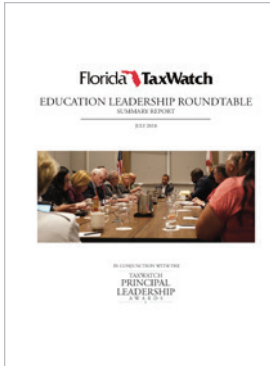


## VOTE NO ON AMENDMENT 1

SEPTEMBER 27, 2018

Floridians voted on 12 state constitutional amendments on November 6, 2018.

The first on the list, Amendment 1 (A1), would have created a new \$25,000 homestead exemption from property taxes. This report showed voters why, although well-intentioned, Amendment 1 would have ended up being a net negative impact on taxes in the Sunshine State.



## 2018 EDUCATION LEADERSHIP ROUNDTABLE SUMMARY REPORT

JULY 16, 2018

In April 2018, TaxWatch convened a 90-minute education roundtable in Orlando to discuss ways to improve the overall quality of pre-K-12 education by improving the leadership qualities of our public school principals. Joining the nine current PLA-winning principals were three former PLA-winning principals, the Chair of the State Board of Education, one current and one former member of the Florida House of Representatives, and a number of business and community leaders from across the state.



## ABOUT REMOTE SALES TAX COLLECTION

JUNE 20, 2018

The U.S. Supreme Court in 2018 issued a ruling that paves the way for a successful resolution to an issue Florida TaxWatch has fought for more than 15 years. This briefing is a summary of TaxWatch recommendations and an overview of this vitally important issue for taxpayers and the governments of Florida.



## 2018 HOW FLORIDA COMPARES: TAXES

JUNE 19, 2018

The 2018 Edition of this annual pocket guide gives taxpayers and elected officials great insight as to how Florida's taxes compare to other states and the national average across a wide variety of metrics.



### TAXWATCH ANALYSIS OF AMENDMENT 2

MAY 14, 2018

In November 2018, Florida voters had a chance to avoid a major property tax increase on owners of commercial or rental property, vacation or second homes, unimproved real estate, or any other non-homestead property. Thanks in part to this report, and the work of TaxWatch, voters wisely chose to pass this amendment and protect the state's non-homestead property from a massive tax increase.



### THE CENSUS DOES MORE THAN COUNT PEOPLE

MAY 5, 2018

The data from the 2020 Census will be used to allocate federal funding for the next 10 years. This makes the upcoming 2020 Census vital to the quality of life in each community across Florida. This report shows the necessity of not only paying attention to the Census, but in local governments' participation in the process.



### 2018 TAXPAYER INDEPENDENCE DAY

APRIL 11, 2018

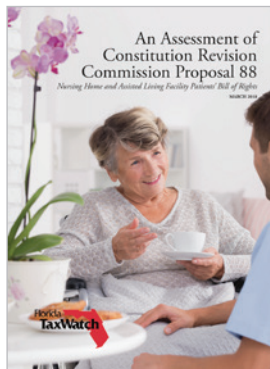
On April 14, Florida TaxWatch joined the taxpayers in our state in celebrating Florida Taxpayer Independence Day 2018. On that day, Floridians are finally earning money for themselves—not for the tax collector. This symbolic date assumes that every dollar earned since January 1 goes to pay federal, state, and local tax obligations.



## 2018 BUDGET TURKEY WATCH

APRIL 3, 2018

The \$88.7 billion budget passed by the Florida House and Senate for FY2018-19 contains 87 appropriations items qualifying as Budget Turkeys worth \$147.5 million. Since projects were not added to the budget during conference this year, most of these were flagged because they circumvented established selection processes. This includes 56 local transportation projects worth nearly \$120 million. These member projects, for which there is no formal evaluation and selection process, bypass the transportation planning process, potentially diverting funds from projects that are in the DOT work program.



## ASSESSING CRC PROPOSAL 88

MARCH 15, 2018

The Constitution Revision Commission was considering a proposal (P88) that, if approved by the voters, would create a new section in the Constitution to establish a "bill of rights" that expands litigation for residents of nursing homes and assisted living facilities in Florida. Florida TaxWatch provided an analysis of P88 to guide Commission members (and the voters) in their deliberations regarding P88 and its committee substitute (CS/P88). The proposal was ultimately not included on the ballot by the CRC.



## INCREASING THE INDEPENDENCE AND EFFECTIVENESS OF THE FLORIDA TAXPAYERS' RIGHTS ADVOCATE

FEBRUARY 19, 2018

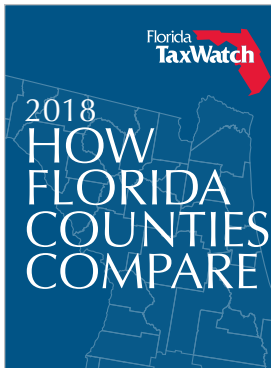
The 2018 Legislature had an opportunity to strengthen and increase the independence of an important taxpayer safeguard—the Florida Taxpayers' Rights Advocate. Senate Bill 826 and House Bill 1345 would make the needed changes to the law. This report helped lawmakers pass those bills, and the Taxpayer Advocate has been strengthened as a result.



TAXWATCH EXECUTIVE VICE PRESIDENT ROBERT E. WEISSERT, ESQ. ADDRESSES THE NEWS MEDIA ABOUT THE IMPORTANCE OF PASSING AMENDMENT 2 ON THE 2018 BALLOT



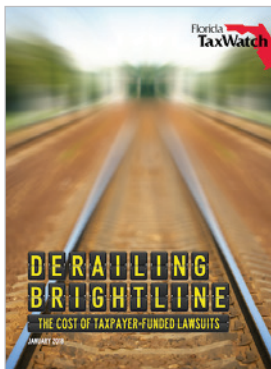
TAXWATCH PRESIDENT & CEO DOMINIC M. CALABRO AND VICE PRESIDENT FOR TAX RESEARCH KURT WENNER (LEFT) ADDRESS THE NEWS MEDIA FOLLOWING THE RELEASE OF OUR REPORT ON AMENDMENT 2



## **2018 HOW FLORIDA COUNTIES COMPARE**

FEBRUARY 12, 2018

This publication compares the revenue and expenditure profiles of Florida's 67 counties to give taxpayers an overview of how their local government stacks up with the rest of the state. The report presents the most recently available data regarding: property taxes, other taxes and fees, county and municipal revenues, county and municipal expenditures, and other related measures.



## **DERAILING BRIGHTLINE – THE COST OF TAXPAYER-FUNDED LAWSUITS**

JANUARY 16, 2018

When completed, the new Brightline train will pass through the Treasure Coast region of the state without any planned stops. This has prompted local governments in the Treasure Coast region to pursue legislative and legal remedies in an attempt to derail Brightline. This report looks at these actions, and whether they are in the taxpayers' best interest.



## **A SECOND LOOK AT SECOND-STAGE COMPANIES IN FL**

DECEMBER 9, 2017

Launched in 2009 to help second-stage companies grow and create new jobs, GrowFL uses principles of Economic Gardening® to help growing companies throughout Florida overcome obstacles to mature and prosper. This report looks at how programs like GrowFL can be helpful in building and strengthening Florida's economy.



STATE BOARD OF EDUCATION MEMBER (AND PAST CHAIRMAN) GARY CHARTRAND HELPS DRIVE THE DISCUSSION DURING AN EDUCATION POLICY MEETING AT THE 2018 ANNUAL MEETING, ALONG WITH DR. PAUL BURNS, DEPUTY CHANCELLOR FOR EDUCATOR QUALITY AT THE FLORIDA DEPT. OF EDUCATION

# TREASURER'S REPORT

Dear Members,

Florida TaxWatch further expanded its statewide representation of taxpayer concerns in Florida during the fiscal year that ended September 30, 2018. This widening support demonstrates the recognized quality and enhanced public value of the institution's mission and research program accomplishments. During this fiscal year, Florida TaxWatch continued to adhere to the sound fiscal standards required of such a respected research institute.

According to the year-end record of expenses, all expenditures went to prepare, conduct, publish, disseminate, and properly communicate the research program's findings, conclusions, and recommendations about Florida government tax and spending policies and practices. No funds were expended on lobbying activities, as specifically restricted by the Institute's Articles of Incorporation and Bylaws.

The Treasurer's Report for FY2018 demonstrates the sound management practices and proper financial controls applied by the institute which ensure effective and productive operations with direct accountability.

According to the financial statement and Treasurer's Report, total expenses of \$2,128,009 were kept below total revenue of \$2,314,958.\*

Respectfully,

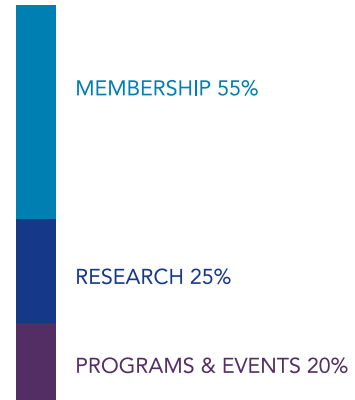


Senator George LeMieux

Treasurer

\* Unaudited

## FY2018 INCOME



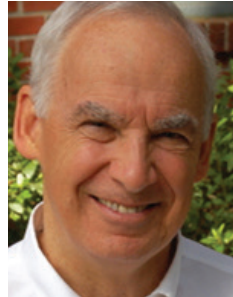
## FY2018 EXPENSES



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PRESIDENT & CEO



**Steve Evans**  
SR. ADVISOR



**Robert E. Weissert**  
EXEC. VP & SPECIAL  
COUNSEL TO THE CEO



**Keith Dean, CPA**  
CFO



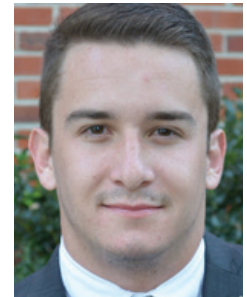
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VP OF RESEARCH



**Bob Nave**  
VP OF RESEARCH



**Chris Barry**  
DIR. OF COMMS. &  
EXTERNAL AFFAIRS



**Kyle Baltuch**  
ECONOMIST & DIR. OF  
DEVELOPMENT



**Brooke Bustle**  
DIR. OF MEMBERSHIP



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EXEC. ASST. TO THE CEO



**Leah Courtney**  
COMMUNICATIONS  
COORDINATOR



**Remi Escudié**  
DIGITAL PRODUCTION  
COORDINATOR



**Terri Rea**  
ACCOUNTANT



**Mia Bella Diaz**  
EXEC. ASSISTANT &  
OFFICE MANAGER



**Isobelle Ellis**  
ASSISTANT TO THE EVP  
& OPERATIONS MGR.

# We Believe

You cannot bring about prosperity  
by discouraging thrift

You cannot strengthen the weak  
by weakening the strong

You cannot help small men  
by tearing down big men

You cannot help the poor  
by destroying the rich

You cannot lift the wage earner  
by pulling down the wage payer

You cannot keep out of trouble  
by spending more than your income

You cannot further the brotherhood of men  
by inciting class hatreds

You cannot establish security  
on borrowed money

You cannot establish character and courage  
by taking away a man's initiative and independence

You cannot help men permanently  
by doing for them what they could and should do for themselves

– From the pen of Reverend William John Henry Boetcker (1873-1962)  
& often attributed to Abraham Lincoln



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