



Supporting Families Together Association

2023 - 2025 State Budgetary

ADVOCACY GUIDEBOOK



**A Guide to Network Budgetary
Advocacy Strategy**

Table Of Contents

Introduction

3

Budget Process Overview

8

Advocacy Throughout the Process

15

Who's Who in the Legislature

Legislative Advocacy Meetings





2023–2025 WI State Budgetary Guidebook

Introduction

SFTA recognizes the Wisconsin budget development process is complex and can seem a bit overwhelming, in response we have created this handy resource for our members. SFTA's Budgetary Guidebook gives advocates a primer on each step of the process and outlines possible corresponding advocacy strategies. Members can use this information to design their own budget season advocacy plans catered to their individual goals, assets, and capacity.

As specific 2023–2025 budget information is published and key dates are released, SFTA will update this guidebook and send out an alert to members.

Act

A bill that has been passed by the Legislature and become law. A bill passed by the Legislature does not become law unless the Governor signs it, the Legislature overrides the Governor's veto of it, or the Governor fails to take action on it within six days of receiving it from the Legislature.

Amendment

A suggested change to a bill or other proposal that has been introduced into the legislative process. An amendment may propose the addition, deletion, or substitution of language in a proposal. See also, "Simple amendment" and "Substitute amendment."

Appropriation

A legislative authorization for the expenditure of funds.

Assembly

One of the two houses of the Wisconsin Legislature. The 99 members elected to the Assembly are referred to as State Representatives.

Author

The legislator or legislative committee that introduces a bill or resolution. Members of the same house who "sign on" to the proposal are referred to as "co-authors." Members of the other house who sign on are called "co-sponsors."

Bicameral

A body having two branches, chambers, or houses. The Wisconsin Legislature is bicameral, consisting of the Senate and the Assembly.

Biennial

Lasting for two years. The Wisconsin Legislature uses a biennial session system.

Budget

A bill first proposed by the Governor and then introduced in the Legislature that outlines the expected state revenues and proposed expenditures for the upcoming fiscal biennium.

Caucus

A meeting of members of the same political party in a particular house of the Legislature. A caucus can be closed or open to the public.

Chief clerk

The officer elected by a house of the Legislature to perform and direct the clerical and personnel functions of that house.

Concurrence

A motion in the second house to approve of (concur in) an action of the first house. See also, "Passage."

Glossary of Terms

Conference Committee or Committee of Conference

A committee consisting of members from both houses of the Legislature that can be formed to resolve differences between different versions of the same proposal passed in the Senate and Assembly.

Confirmation

Ratification by a house of the Legislature of a nomination for appointment by the Governor. In Wisconsin, most legislative confirmation is conducted by the Senate.

Engross

To incorporate all amendments and corrections to the original proposal in the house of origin before consideration by the second house.

Enroll

To incorporate all amendments and corrections to a proposal that were passed, adopted, and concurred in **Executive session or "exec"**

A legislative committee meeting during which the committee votes, or takes "executive action," on a bill or other proposal. The public is generally not allowed to testify at an executive session. The word "Exec" is also used to mean holding a committee vote on a proposal during an executive session.

Extraordinary session

The convening of the Legislature to accomplish specific business identified in the action calling the session. Extraordinary sessions can be called by the Assembly and Senate Committees on Organization, by petition, or by joint resolution of the Legislature.

First reading

The formal recognition by a legislative body that a bill or other proposal has been introduced.

Fiscal Estimate

An estimate of the effect of a bill on the revenues and expenses of state and local governments.

Floorperiod

Periods of time identified in the legislative session calendar as available for consideration of proposals by the full Assembly and Senate.

Germaneness

The relevance or appropriateness of an amendment to the subject of a bill. Non-germane amendments are not permitted.

Hearing

A legislative committee meeting during which the committee gathers information about proposals under consideration by the committee or other topics related to the committee's assigned issue areas. Public testimony is generally accepted at legislative hearings.

Interim

A period of time during which the Legislature is not in session.

Introduction

The formal offering of a legislative proposal, for consideration by the house in which it is introduced, by a legislator or a legislative committee. Once introduced, a legislative proposal is assigned a number, for example 2011 Senate Bill 1. by both houses.

JFC or JCF or Joint Finance Committee

The Joint Committee on Finance, a joint committee that is charged with review of all state appropriations and revenues and, in particular, the biennial budget recommendations of the Governor.

Leadership

Officers of the Legislature responsible for its operation and management of each political caucus. Examples of legislative leadership positions include the Senate president, the Senate president pro tempore, the Assembly speaker, the Assembly speaker pro tempore, the majority and minority leaders of each house, the assistant majority and minority leaders of each house, and the chairperson for each caucus.

Legislation

A proposed or enacted law or change to a law.

Legislative service agencies

The nonpartisan agencies that provide legal, analytical, and technical support to the Legislature. They are:

- the Legislative Audit Bureau (LAB)
- Legislative Council Staff (LC)
- Legislative Fiscal Bureau (LFB)
- Legislative Reference Bureau (LRB)
- Legislative Technology Services Bureau (LTSB).

Glossary of Terms

Lobby

To attempt to influence an elected official on an issue. Lobbying is strictly regulated in Wisconsin and lobbying laws are administered by the Government Accountability Board.

Motion

A formal request made for a specific action to be taken in legislative committee executive sessions or during floor debate. Appropriate motions are determined by the applicable rules of procedure.

Nonpartisan

Not based on, biased towards, influenced by, affiliated with, or supporting the interests or policies of a political party.

Nonstatutory law or “nonstat”

A provision in a bill or act that has a temporary application that is not continuing, and therefore is not included in statutory revisions.

Notice

A formal notification under the state's Open Meetings Law of when and where a public meeting will occur and what issues will be addressed, provided in advance of the meeting.

Open meetings law

A state law requiring that public meetings generally be open and made accessible to the public and that public notice be provided in advance of meetings.

Open records law

A state law requiring that governmental records generally be open and made available upon request.

Passage

A motion seeking approval of a legislative proposal that originated in the house considering the motion. See also, “Concurrence.”

Presiding officer

The person presiding over the Senate or Assembly in a legislative session.

Proposal

A bill, amendment, or resolution before a legislative house awaiting action.

Quorum

The minimum number of members of a committee or legislative body that must be present for business to be conducted.

Recess

A time when a legislative body is not in session.

Recommendation

The result of a legislative committee vote on a proposal, for instance, recommending passage of or concurrence in a bill.

Reconsideration

A motion to revisit an action of a committee or legislative body.

Referral

Assignment of a proposal to a legislative committee for its review.

Rejection

A motion seeking disapproval of an amendment to a proposal.

Resolution

A formal statement of opinion or intention passed by a legislative body. Resolutions in the Wisconsin Legislature can be proposed to both houses through a joint resolution. Proposals to amend the Constitution, to create, amend, or repeal a legislative rule, and to set the Legislature's session calendar are also made by resolution.

Second reading

The stage of consideration of a proposal during a floor session during which amendments to the proposal may be considered.

Senate

One of the two houses of the Wisconsin Legislature. The 33 members elected to the Senate are referred to as State Senators.

Sergeant-at-Arms

The officer elected by the members of one house of the Legislature to perform and direct the police and custodial functions of that house.

Slash number

The number signifying the version of a document drafted by the LRB. The "slash number" of a draft is the number following the "/" (slash) in the LRB number on the proposal, with the highest numbered version being the newest version.

Glossary of Terms

Special session

A session of the Legislature convened by the Governor to accomplish a special purpose.

Study committee or special committee

A committee appointed by the Joint Legislative Council to examine major issues and problems identified by the Legislature. Study committees are made up of legislators and citizens who are interested in or knowledgeable about the study topic and usually do most of their work when the Legislature is in recess.

Table

A motion to temporarily set aside a proposal and move to other business.

Third reading

The stage of consideration of a proposal during a floor session during which bills and other proposals come up for final discussion and possible passage. No amendments may be considered at this point.

Twenty-four hour rule

A rule sometimes imposed by legislative committee chairs requiring that any amendments to be considered in executive session must be distributed to the committee members at least 24 hours prior to the executive session.

Unanimous consent

A motion asking for unanimous approval of a question without a roll call vote. If an objection is not heard, it is assumed that the request has the consent of all members present.

Veto

The action by which all or a part of a bill is rejected by the Governor.

Veto override

A vote of both houses of the Legislature to overturn a gubernatorial veto. To be successful, such a vote must receive a two-thirds vote in both houses.



Wisconsin's Biennial Budget

Wisconsin's Biennial Budget

The Wisconsin state budget is a legislative document in which the Governor and Legislature express their public policy goals in financial terms. It both commits state spending and estimates expected revenues during the fiscal biennium. The fiscal biennium (also called the biennial budget period) covers two state fiscal years running from July 1st to June 30th. Advocates often talk about the budget being a moral document. By prioritizing spending for some things and leaving others out, the budget shows quite starkly what is valued, and what issues our elected officials feel the strongest about. Every day as we turn on water faucets, drive on roads, send our kids to school, and utilize other public infrastructure, our experiences, choices, and actions are colored by the nuances of the current Wisconsin Budget.

While the Governor first drafts and submits the budget bill, our state legislature ultimately holds the power of the purse and is responsible for directing the executive branch as to the amounts and purposes of all state moneys spent. The state budget is the most consequential piece of legislation they will pass during the entire session. It not only designates how almost all money will be spent by the state over the biennium, but it's also the one bill that they "must pass" so that the day-to-day operations of the state continue. Due to the mandatory nature of this bill, it is seen as the primary means the Governor uses to advance their policy agenda for the state, using their budget proposal to call attention to the policy goals their administration would like to see the legislature prioritize throughout the session.

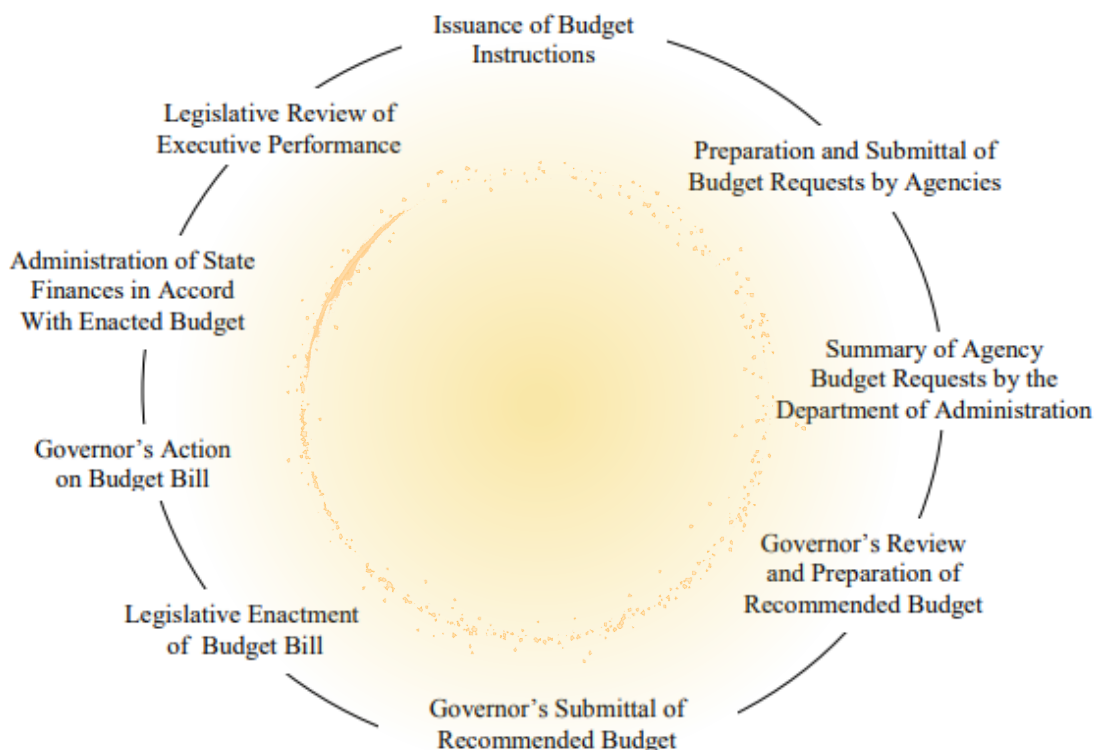
Balancing the Budget

Article VIII, section 5 of the Wisconsin State Constitution says the legislature is obligated to “Provide for an annual tax sufficient to defray the estimated expenses of the state for each year”. This language requires the budget to be written ensuring state expenditures and revenues will balance out. This means (unlike the federal system) all new or ongoing programs must be shown to be paid for by projected state revenues. As the budget bill passes through different iterations and versions, recalculations are continually done with this constraint in mind. While the budget is always balanced on paper, analysts note we often end up with a structural deficit, meaning ongoing revenues are less than ongoing spending. By employing strategies like phasing-in tax cuts without paying for them, delaying payments from one year to another, transferring segregated monies over to general purpose revenues, etc., legislators can manage to use one-time revenues to cover ongoing costs.

Wisconsin's Biennial Budget

The Budget as a Cycle

The process of updating our state budget is a cyclical one. It starts with the executive branch asking administrative agencies to submit requested amounts. The budget is then drafted by the Governor's office, modified, and passed by the legislature, to be sent back to the Governor's desk for signature. Upon enactment, expenditure of new budget appropriations begins, until it is time to review that expenditure and begin the cycle all over again.





How our State Budget is Created

Agencies Submit Requests and a Budget Bill is Drafted

Large Executive branch agencies like the Department of Children and Families (DCF) will start planning and developing their funding requests around the beginning of even numbered years. In July the State Budget Office (housed within the department of Administration) releases budget instructions to executive branch agencies, the Governor's broad policy goals intended for agencies to achieve, can be included in these instructions. Agencies use this finish authoring their budget requests, due by mid-September. Legislators can stay apprised of what agencies have submitted, but the information is not yet made public. The director of the state budget office reviews these along with the Governor's office, working with the Legislative Reference Bureau's legal counsel to draft the budget bill text. In late November the Department of Administration publishes a compilation and summation of the agency requests as well as estimated revenues for the upcoming fiscal biennia. The Governor, the Governor Elect, and each member of the newly elected legislature gets the budget request report to keep apprised of what to expect on the first draft. In early January of the following year the legislature reconvenes. By the last Tuesday in January of odd numbered years, our Governor is required to deliver the budget bill to the legislature. This deadline is regularly pushed back, however, due to the desire to inform the budget with the more accurate fiscal revenue estimates received by the state in late January.

July
even year

State Budget Office
Releases instructions



Sept
even year

Agencies submit their
budget requests



Nov
even year

A compilation of Agency
requests are published



Jan
odd year

The Governor deliver's their
budget to the Legislature



How our State Budget is Created

Preparing the Executive Budget

The Governor's office may opt to provide opportunities for public input on budget priorities. Similar to the customary public hearings put on by the legislature's committee on joint finance (covered in upcoming pages), these meetings allow citizens to advocate that the Governor adopt their preferred spending recommendations in the executive version of the budget.



Whereas Legislative budget listening sessions are a standard part of the process, not all Gubernatorial administrations will decide to hold public hearings. The current Evers Administration has incorporated this into their budget development process both times. These pictures show a few past executive budget listening sessions.



The time to expect announcement of these virtual and regional public hearings is in December of the even numbered year and in early January of the odd numbered year. It typically happens after the state budget office has released the agency request summary report and a few weeks before the Governor is due to issue their budget.



How our State Budget is Created

The Governor Delivers their Budget Proposal

The Governor delivers their budget proposal with a formal budget address to the Legislature and public. Similar to the state of the state address, this speech is broadcast on public television/radio and carried by local news stations. This address gives the Governor a chance to champion their key spending priorities and lay out their major policy aims for the entire legislative session.

This year, Governor Evers will deliver his **budget address** on **February 15th**. SFTA will issue an advocacy alert to members following the release of the budget, with analysis of the speech, information on pertinent line-item amounts, and links to all the public budget documents. SFTA will also issue a **press release** publicly commenting on the executive budget bill.



Documents Released at this stage

Documents supporting the proposed budget bill are included in what's known as the **Governor's Budget Book** or State Budget Report. Here you can find a brief description of each agency along with summary fiscal information including the governor's recommended changes to the existing budget level. Sometimes this will also contain a brief summary of the reasoning for that decision, and new items not requested by the agency are listed. Anything not recommended in the budget proposal but requested by the agency is listed in title only, with no further information.

The State Budget Office publishes a **"budget-in-brief"** document, overviewing the major changes recommended by the Governor.

The Legislative Fiscal Bureau (LFB), a non-partisan service agency who holds policy and budgetary expertise, will start working on publishing a **detailed summary document** that contains an analysis of every single item in the bill. The LFB's summary document is published approximately four to six weeks after the bill has been introduced and will be periodically updated throughout the legislative process as the bill changes with amendments.

Upon presentation to the legislature, the budget bill is always referred to the Joint Committee on Finance (JCF) for introduction. JCF's work on the bill is the next step in the process.

Feb 15th
The Governor deliver's their budget to the Legislature



Feb Mar April
Additional budget papers and summary information is released



How our State Budget is Created

The Legislatures' turn to develop the Budget

While our Governor puts forth the first version of the budget bill, the legislature then reviews and modifies it. Sometimes they reject it altogether and totally re-write it. Entirely new policies of their own can be inserted, and the governor's original policies can be refashioned to such an extent that they don't at all resemble the original intent and form. The final product of the budget is very much considered a product of our legislature. The first committee to take up the budget is JCF, The Joint Committee on Finance.

The Joint Committee on Finance

This is the legislature's standing committee tasked with reporting on any bills that affect revenues, taxes, or expenditures before the rest of legislature can take them up for consideration and passage. Because of this, they are considered the most powerful standing committee in state government and this committee is used like training grounds for legislative leadership. The JCF is comprised of eight senators and eight representatives, with the majority party typically holding six of the eight seats in each house. They are responsible for researching the budget items, looking at policy alternatives, and making modifications to the original bill. While the executive branch has about six months to prepare the budget bill, the JCF will typically do its work in a much shorter time span, usually around two or three months. Portions of the budget can be reviewed by other committees too at this time, relevant to their purview. This is done at the discretion of the chairperson of the standing committee, and they may decide to forward their recommendations to JCF. Working groups can form among committee members to consider the proposed policy alternatives. Issue papers are continuously published by LFB on various budget items, accessible on the LFB's website under budget papers.

[Click Here](#)
to go to LFB's website



The 2023 Joint Committee on Finance

[Click Here](#)
to go to JCF's webpage

JCF Leadership

(Co-Chair)

(Vice-Chair)

- Sen. Marklein
- Rep. Born
- Rep. Katsma
- Sen. Stroebel

JCF Members

- Sen. Felzkowski
- Sen. Ballweg
- Sen. Testin
- Sen. Wimberger
- Sen. Johnson
- Sen. Roys
- Rep. Zimmerman
- Rep. Rodriguez
- Rep. Kurtz
- Rep. Dallman
- Rep. Goyke
- Rep. McGuire



Partisan Composition

Because the Republican Party holds the majority in both houses of the Legislature, Democrats only hold four seats on JCF this year.

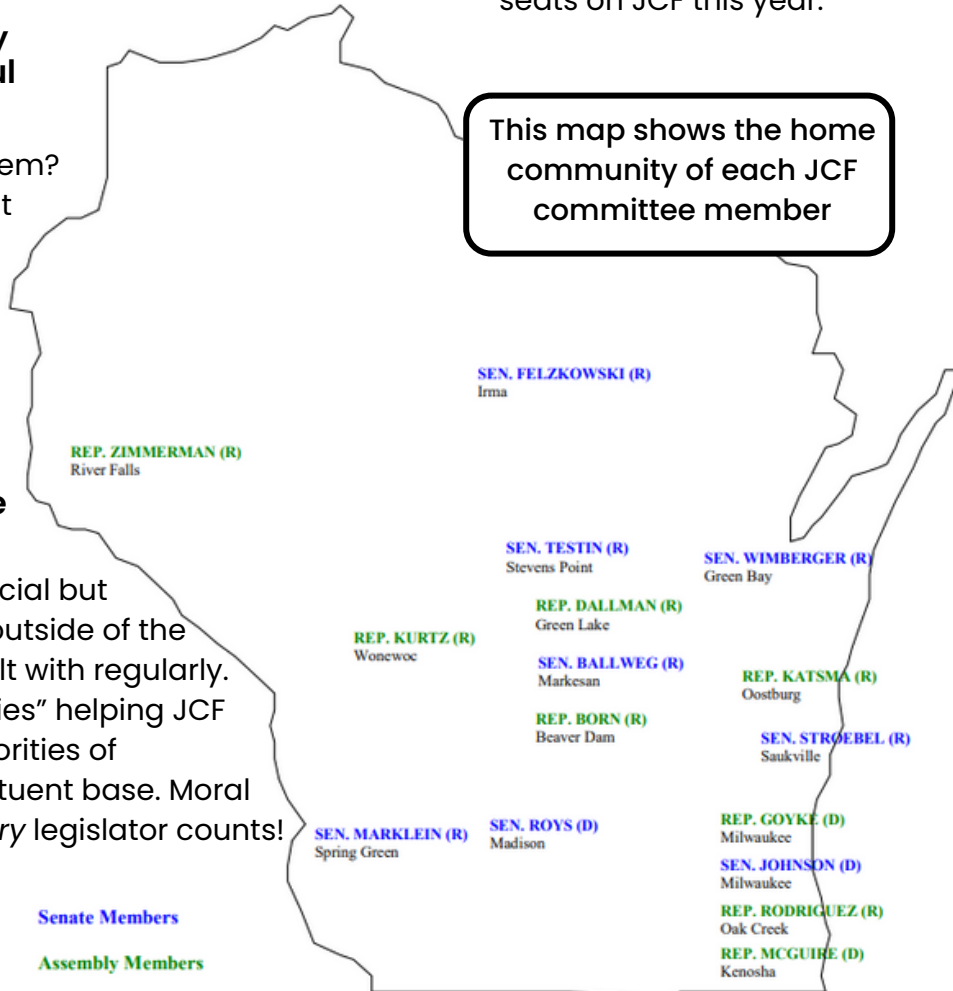
Do you see your Senator or Assembly Member represented on this powerful committee?

If so, what is your relationship like with them? Have they heard from your agency about the importance of your work and of investing in our children, families and early educators?

If your representatives are not directly serving on this committee, did you know they may still be influencing Joint Finance Committee decisions?

That's right, all JCF members have unofficial but influential relationships with legislators outside of the committee that they connect and consult with regularly. You can think of them like "finance buddies" helping JCF members understand the needs and priorities of Wisconsinites outside of their own constituent base. Moral of the story? Every conversation with every legislator counts!

This map shows the home community of each JCF committee member





How our State Budget is Created

Joint Committee on Finance Holds Public Budget Hearings

While the bill is under consideration by the JCF, public hearings on the budget commence. There are two main types of public hearings: informational briefings and public hearings.

Agency informational briefings allow the committee to receive testimony from executive branch agencies. Agencies (such as DCF) get a chance to make their requests and explain budgetary effects on programming; JCF members get a chance to ask follow up questions and gain more contextual information around their decisions.



Key Opportunity to Advocate

The other type of hearing is intended to gather testimony on the budget from the general public and interest group representatives, in what are often called **“budget listening sessions”**. Typically, four of these hearings are held regionally across the state to encourage more participation. The time period these hearings are scheduled for depends on when the legislature has a floor session, as committees cannot meet during floor session; but they always occur after the LFB has published their detailed budget report. We can anticipate hearing the dates and locations for the listening sessions around the end of February or beginning of March. SFTA will issue an advocacy alert to the network once this information is released.

JCF
Holds informational briefings to gather testimony from executive branch agencies



JCF
Hosts regional Listening Sessions to gather public testimony



JCF
Goes into executive session to draft their budget bill amendment

After holding the public hearings, JCF goes into executive sessions to make their decisions on bill items. These meetings are open to the public to observe, but no public comment can be made at this point. The version of the budget that JCF passes is written as an amendment to the original bill and sent off to each house of the legislature for additional amendment and passage.



How our State Budget is Created

The Rest of the Legislature Works on The Budget

Each house now has the option to further amend and re-write the budget. This means changes may still occur, as any member of the legislature could theoretically propose an amendment. Many political factors dictate what may happen at this point, including whether the same party has majority in both houses, whether the non-JCF members feel the budget serves their interests, and the likelihood of the successfully convening of a conference committee on the bill (an option the legislature will use to resolve differences and mediate agreement when the two houses pass versions of a bill that are extremely different).

JCF drafts amendment
This draft now heads to the full legislature



The Senate & House pass their versions
These two versions are reconciled then head back to the Governor's Desk



The Governor signs it into law
The Governor could partially veto the bill, reducing expenditures

The Legislature Passes the Budget

With the previous budget officially slated to end June 30, our legislature aims to pass the new one by then, but Wisconsin does not have a “drop-dead” date by which the budget must be passed. This means if a budget bill is not enacted by June 30th of an odd-numbered year, the previous state budget levels of funding continue until the new legislation goes through.

The Budget Heads to The Governor’s Desk for Signature

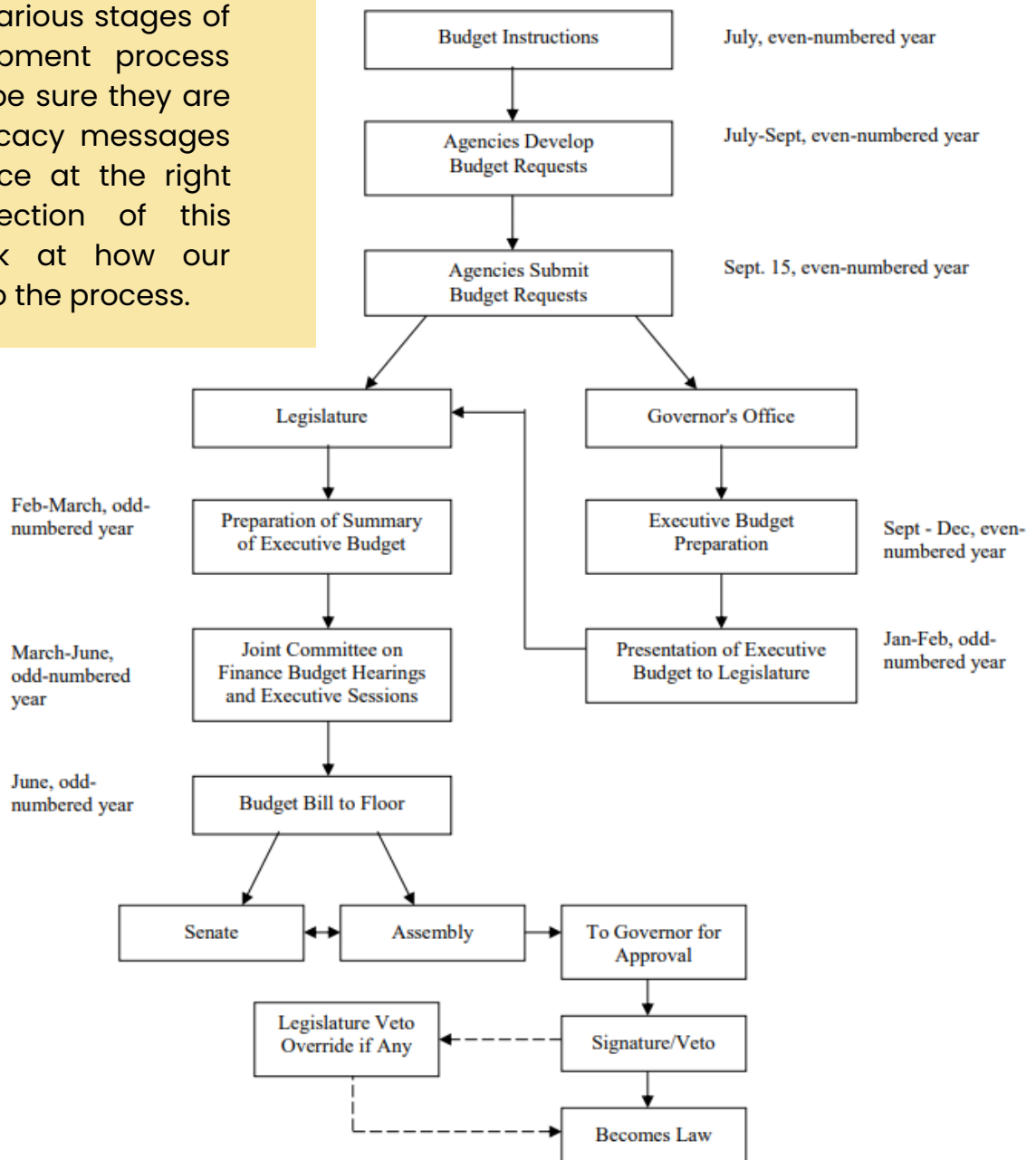
Our governor has partial veto power over all appropriations bills. This means they can reduce dollar amounts devoted to state agencies and, within limitations, edit out certain words and digits in newly created appropriation bill text. To override the partial veto, the legislature must have a two-thirds vote in each house, which is rare. With the Governor's signature, the budget bill becomes law.



An Overview at a glance

A Flowchart of Wisconsin's budget creation process

Understanding the various stages of the budget development process allow advocates to be sure they are directing their advocacy messages to the right audience at the right time. The next section of this guidebook will look at how our advocacy maps onto the process.



Beginning of even-numbered year to reconvening of legislature the following January

1

- Legislature reviews current budget
- State Budget Office releases budget instructions to executive branch agencies
- Preparation and submittal of budget requests by agencies
- Governor, State Budget Office review of agency recommendations, preparation budget proposal
- Summary of requests published

Late January to February of odd-numbered year

2

- Governor's submittal of budget bill to legislature and delivery of budget address
- Budget bill is referred to the Joint Committee on Finance (JCF) upon introduction to the legislature.

Approximately February to May of odd-numbered year

3

- Legislative Fiscal Bureau publishes detailed summary document on budget items (around 4-6 weeks after bill introduction)
- Regional public budget hearings are held
- JCF creates and finalizes their version of the budget (becomes amendment)

The Budget Cycle

July (or slightly later) of odd numbered year

5

- The legislature passes the budget bill, which sends it back the governor's desk
- The governor has partial veto power (the legislature can veto-override with a 2/3 vote)
- The budget is signed, enacted into law, and the new budget goes into effect

May / June to July of odd numbered year

4

- Both houses of the legislature are able to amend and pass versions of the budget.
- They may call a conference committee to help negotiate a final version they can agree to passing

Upon enactment of budget bill (around July of odd-numbered year)

6

- The newly created budget goes into effect until the end of the fiscal biennium, July 1, the following odd-number year

1 Beginning of even-numbered year to reconvening of legislature the following January

- SFTA develops policy agendas:
 - SFTA prepares advocacy resources and materials for policy agendas.
- Election season is capitalized on, members run GOTV efforts and issue advocacy
- Advocacy communications are directed to relevant executive branch agencies in the spring or summer
- Advocacy communications are directed to the Governor's office in the last quarter of the even numbered year and beginning of odd numbered year

2 Late January to February of odd-numbered year

- Regular advocacy COPs and trainings resumed for budget season.
- SFTA analyzes the Governor's budget proposal and issues member update.
- SFTA Issues Press Release on Budget

3 Approximately February to May/June of odd-numbered year

- SFTA reviews LFB's summary, issues member update
- Network focuses on advocacy communications and meetings with the legislature, particularly JCF members
- SFTA supports the network in capitalizing on regional public budget hearings
- Advocacy Day occurs
- once final, SFTA reviews JCF's amendment, issues member update

The Advocacy Cycle

6 Upon enactment of budget bill (around July of odd-numbered year)

- Post-budget bill enactment, network strategizes about next steps for rest of legislative biennium direct advocacy and ongoing grass roots/community organizing work
- COP may decide to meet less often

5 July (or slightly later) of odd numbered year

- Asks could be made to the governor about partial vetoes before he signs
- SFTA issues Press Release with our response to the budget

4 May / June to July of odd numbered year

- Network focuses on advocacy communications and meetings with entire legislature.
- A Day w/out CC occurs
- SFTA reviews final budget, issues member update