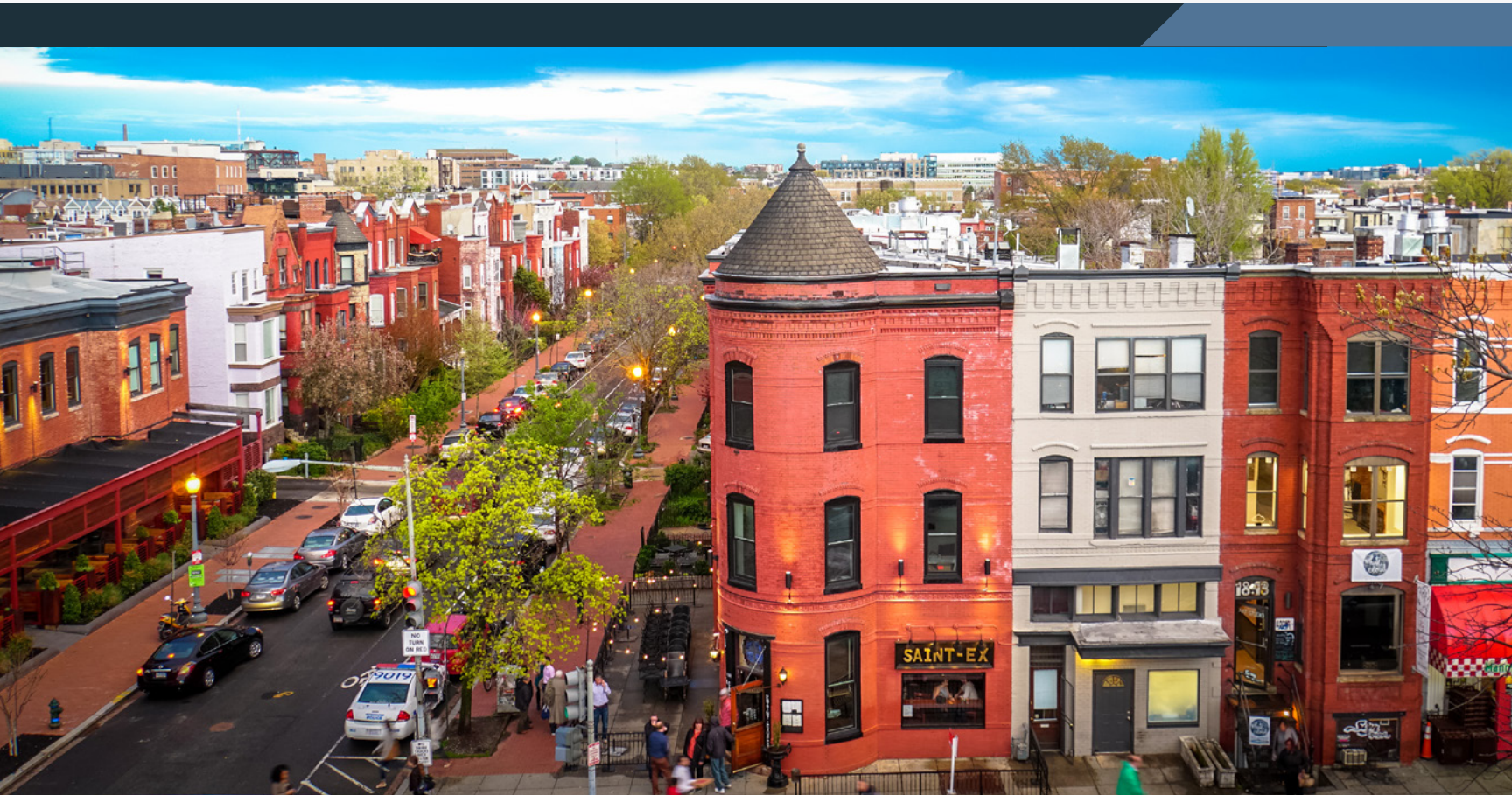


2018

ANNUAL REPORT



D.C. POLICY

CENTER



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OUR MISSION

The D.C. Policy Center is a non-partisan, independent think tank focused on advancing policies for a vibrant and growing economy in the District of Columbia.

We are dedicated to providing objective, targeted, and high-quality data analyses to support a rigorous and productive policy debate.



**D.C. POLICY
CENTER**

Our thanks to Ted Eytan, who has opened his entire photography library to the D.C. Policy Center. Photos throughout this report by Ted Eytan except where otherwise noted.

FROM THE CHAIRMAN AND EXECUTIVE DIRECTOR

Dear Supporter of the D.C. Policy Center:

With only two full years of operations, the D.C. Policy Center is already a highly regarded and trusted source of research and analysis throughout the District of Columbia. We are fortunate to have reached many milestones in 2018: we published over 200 widely-read studies, successfully launched our Education Policy Initiative, more than doubled our operating budget, and transitioned into an independent 501(c)(3) nonprofit after our incubation at the Federal City Council. Our first order of business, then, is to express our deep gratitude to Mayor Anthony Williams and the rest of the Federal City Council staff and trustees for their support and continued collaboration.

The mission of the D.C. Policy Center is to advance policies for a vibrant and growing economy in the District of Columbia. We provide objective, targeted analyses of the District's economic, fiscal, and social conditions to support robust policy debate and inform key decisionmakers. In 2018, we published 82 such analyses, including a groundbreaking study of the District's housing stock, an in-depth exploration of tax and budget practices, and a widely-cited analysis of the potential impact of Amazon on the regional labor market. Our Education Policy Initiative's first series of reports provided new insights into the enrollment patterns and diversity of D.C. public and charter schools. Analyses by our independent research Fellows brought into focus additional issues, including employment trends, workforce development, transportation, infrastructure, and the opioid crisis.

With broad media coverage, frequent appearances before the D.C. Council, and speaking invitations to events across the region, the impact of the Policy Center's work is clear and far-reaching.

We are particularly grateful for the continued financial support for the Policy Center by individual and corporate donors as well as local and national foundations. With your support, the Policy Center will continue to be a valued contributor to policy conversations in the city, as we advance our vision of a District of Columbia that is vibrant, inclusive, and prosperous for all.

Sincerely,

Charles "Sandy" Wilkes
Chairman of the Board



Yesim Sayin Taylor
Executive Director



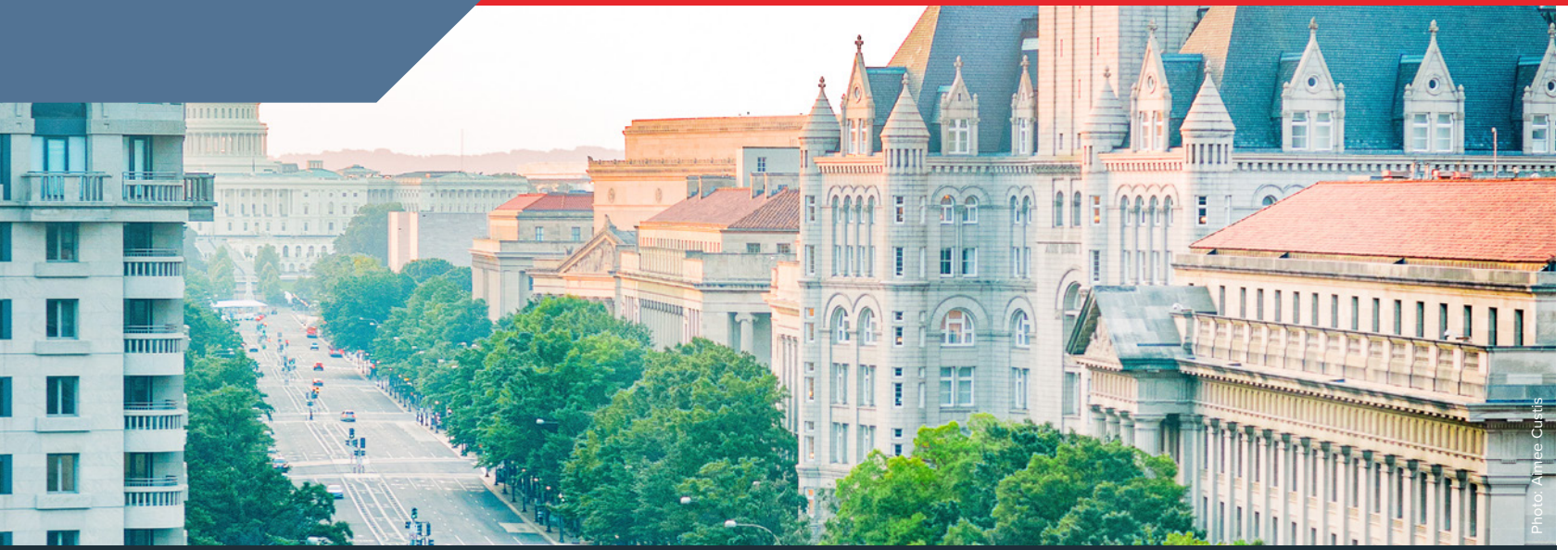


Photo: Aimee Cusatis

About the D.C. Policy Center

The D.C. Policy Center is a 501(c)(3) nonprofit advancing policies for a strong and vibrant economy in the District of Columbia. We are committed to providing objective, high-quality data analyses to support wide-ranging and productive policy debate in the District.

The D.C. Policy Center works to inform policies that can make the District a growing, inclusive, and competitive city. We are focused on the long term: while the city has a strong track record of accomplishment, we believe that its real opportunities still lie ahead.

As we consider what the District will have accomplished 20 years from now, we see a city with a growing, thriving, inclusive, and vibrant economy that delivers economic opportunity for all its residents. But to get there, the District will need to add more housing at all levels of affordability, improve its transportation network, continue to strengthen its public education system, foster attractive business conditions for establishments of all types and sizes, and employ workers with a variety of skills. Importantly, the District must still

strive to remove barriers to attaining better lives for residents of all backgrounds, races, and income levels.

WHO WE ARE

We are independent, nonpartisan, and open-minded.

We believe any idea can be debated and possibly improved, and that people can disagree without being disagreeable. Accordingly, our research is shaped by data, not by ideology.

We have an unwavering focus on the District of Columbia, its residents, its economy, and its place in the region.

We track population, jobs, wages and income, changes in industry structure, business conditions, housing fundamentals, activities in key industries, and changes in demography. We put the District's local and regional strengths and weaknesses in context, tracking opportunities for regional collaboration, and reflecting on the dynamics of intra-regional competition.

We are most interested in the city's long-term growth, and social and economic outcomes.

We believe sustainable growth requires longer-term policies that can break racial and income barriers.

We have a broad agenda.

We cover as many issues as resources allow in order to promote sound policies that fit the economic realities of the District. We believe health, education, workforce development, criminal justice, transportation, and housing policies are as central to growth as overarching economic and fiscal policies.

We work across all sectors.

We bring together policymakers, employers, industry leaders, community advocates, and civic leaders to share and seek ideas, as they create coalitions to advance comprehensive policies for a strong, competitive, and inclusive city.

WHAT WE DO

We undertake rigorous research.

Our research is original, unbiased, and informative.

We engage in constructive dialogue and debate.

We keep track of local policy priorities to ensure that our research is relevant, meaningful, and speaks directly to the current policy environment. We testify at hearings, brief elected decisionmakers and other stakeholders, and engage with other research organizations and advocacy groups. Our data and analyses have been used by D.C. government agencies, the D.C. Council, and a wide array of research and advocacy groups across the District.

We provide the intellectual capital that fuels coalitions.

Our primary audience includes key members of the District's policy world who collectively shape the direction of policy in the District, such as the Mayor and executive branch appointees; Councilmembers and their staff; career civil servants; and engaged advocates, employers, business groups, associations, academics, and analysts. Policymakers are our natural allies and our most effective partners.

We proactively engage employers in local policy.

Through the active engagement of our Board of Directors, we are able to ensure that the leaders of the District's major industries, including nonprofit organizations, are not missing opportunities to generate creative, comprehensive solutions to challenges that remain. We work closely with employers and are well-positioned to bring them into conversations about D.C.'s future, which, in turn, creates more opportunities for the District's many stakeholders to come together to find common ground.

WHY WE'RE DIFFERENT

We are focused on providing research of the highest standard.

Free from a particular political orientation or ideology, we compete in the "marketplace of ideas" to promote policy of the highest merit. Integrity of data and analyses is our primary concern, regardless of the consequences of where truth takes us.

We have a broad view of policy.

Unlike single-issue organizations, we explore a

sweeping range of interconnected policy issues through a wide lens. These include housing, education, the economy, the business environment, fiscal conditions, transportation, poverty, racial equity, and health, among other important subjects.

We work to enhance the quality of policy deliberations across the entire city.

We continuously seek feedback from civic and industry leaders and policy experts on our studies, and readily share our data, analyses, and findings with anyone interested in fact-based, intellectually rigorous approaches to policy.

We are effective.

We have established a reputation for timely, high-quality, data-driven policy analysis, as measured by media citations, use of our work by other

organizations, our public profile, our online readership, and the attention of policymakers.

LOOKING FORWARD

Advancing growth-focused policies for the District requires creative ideas, sound strategy, direct and regular engagement with lawmakers, and hard work. Through 2020, the D.C. Policy Center will work on an agenda to improve economic and social outcomes in the District. Building on our strong publication record, we will continue engaging policy leaders and elected officials through events, testimony, and convenings. We will also grow our Fellows program, continue to increase our resources, and strengthen our public presence.

We hope you will continue to support us in our endeavors.



2018 BY THE NUMBERS

What we learned

\$137.5 billion

The collective value of D.C. homes in 2018, based on District tax assessments.

"Tax practices that amplify racial inequities"

44

The number of headquarters with 500+ employees that moved to the Washington metropolitan area from elsewhere in the country from 2000 to 2014.

"How big of a deal is Amazon HQ2 for the DC Metro Region?"

16%

The percentage of single-family homes in D.C. large enough for four people that are potentially affordable to Millennial couples without children who earn the median income.

"Will Children of Current Millennials Become Future Public School Students?"

37%

The percentage of District residents who were born in D.C.

"Made in D.C.: Which areas have the highest share of D.C.-born residents"

26%

The share of D.C.'s housing stock comprised of individual housing units (condos or single-family homes) rented out by their owners, known as the "shadow rental market."

"D.C.'s shadow rental market"

27%

The share of D.C. public school students who attended their in-boundary traditional public school in the 2016-2017 school year.

"What does school diversity look like in D.C.?"

What we accomplished

82

The total number of analyses, reports, articles, and other publications produced by the D.C. Policy Center in 2018.

21

The number of individual media outlets that cited the D.C. Policy Center's work in 2018.

62

The total number of individuals, firms, and foundations that have donated to the D.C. Policy Center to make our work possible.

29.8%

The average percentage of subscribers who opened our weekly newsletter in 2018 -- compared to the industry average of 19.7%.

590,000

The number of times our tweets -- 653 in total -- were seen by our followers in 2018.

325

The number of unique people who visited our website on an average weekday in 2018.

DEEP DIVE

Employment trends in the Washington, D.C. metropolitan area

Recent reports increasingly point to a slowdown in the Washington, D.C. metropolitan area economy, with slower hiring and high office vacancy rates in the District, and stronger private sector employment in several places outside the city. A deeper dive into jurisdictional differences across the Washington metropolitan area reveals a complicated picture: most notably, the District's role in the region as an employment center, while growing from 2010 to 2018, appears to have slowed.

To explore metropolitan area employment trends between 2010 and 2018, we turn to the Quarterly Census of Employment and Wages (QCEW), which is based on administrative records related to unemployment insurance taxes. These data are released quarterly, with just over half a year of delay. While some groups of workers are excluded—such as self-employed individuals, workers on small farms, and student workers hired by universities—QCEW data are a useful source for analyzing intra-regional employment and pay trends.

These administrative data reveal important regional trends in hiring. First, across the entire region, the federal government's role as an employer is declining, but this has been offset by strong growth in private sector and local government employment. Second, the District's regional share in private sector employment increased through the first half of 2018, as the city outperformed its immediate neighbors: Arlington, Alexandria, Fairfax County, Montgomery County, and Prince George's County. However, the exurbs of Virginia—especially Loudoun and Prince

William counties—outperformed even the District in private sector employment growth. Finally, D.C.'s wages are rising faster than other jurisdictions in the metropolitan area, making the District the most expensive place for businesses across almost every industry in terms of labor costs.

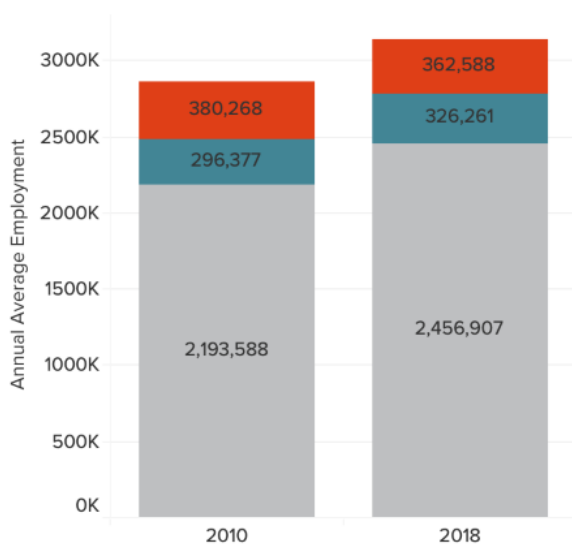
The federal workforce in the Washington metropolitan area shrank between 2010 and 2018, but growth in private sector employment largely made up the losses.

Between 2010 and 2018, total employment in the greater Washington metropolitan area grew by nearly 10 percent, increasing from 2.87 million to 3.15 million. During this period, regional federal employment declined by 5 percent, but private sector growth made up for this loss. In fact, private sector employment in the same period grew by 12 percent, and now accounts for 78 percent of total employment in the metropolitan region.

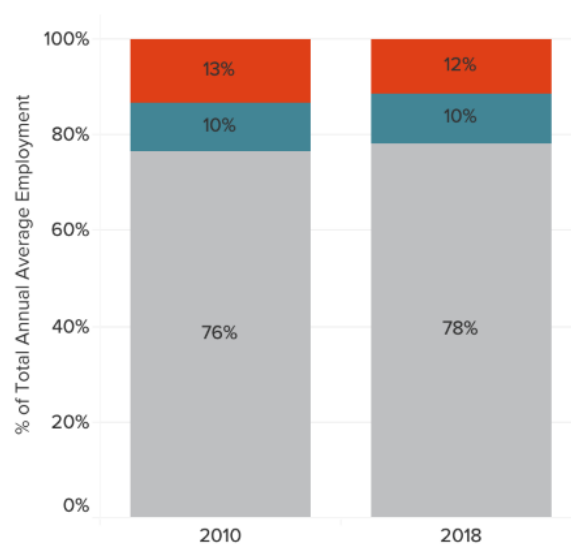
While the private sector is clearly growing, there are no significant structural changes in what the region does best. What has been lost by the shrinking of the federal workforce is being made up by the region's tried-and-true key industries: Professional and Business Services, Education and Health, and Leisure and Activity. The employment profile by industry showed little change between 2010 and 2018, as shown in the chart on page 7. The Leisure and Activity sector (including hotels, restaurants, and entertainment venues) and the Education and

Washington Metropolitan Area Private Sector Employment, 2010 and 2018

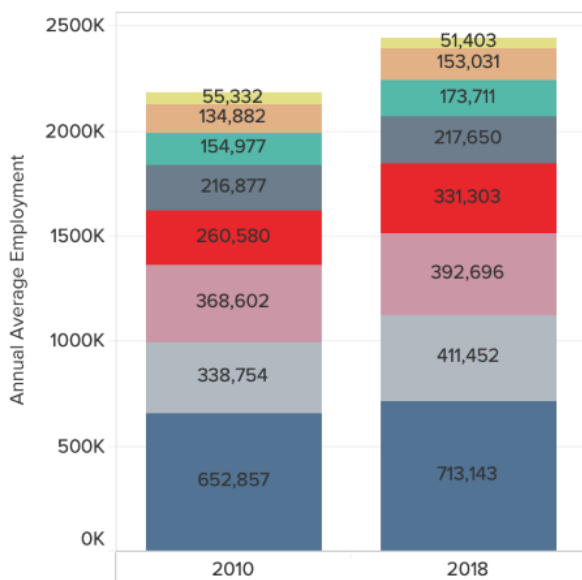
Levels by Sector



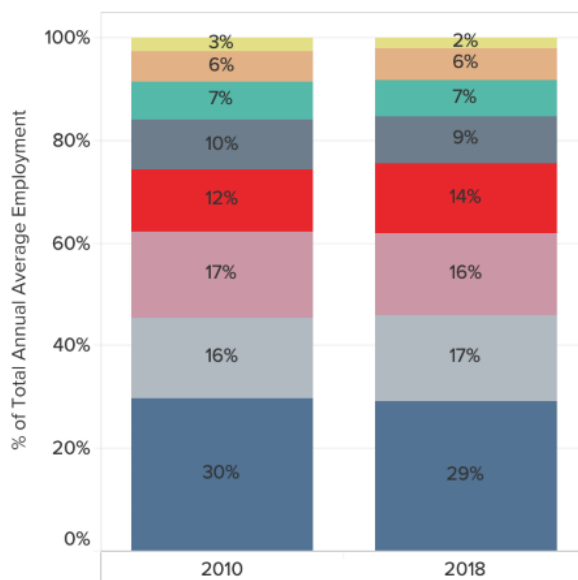
Shares by Sector



Levels by Industry



Shares by Industry



- Manufacturing
- Construction
- Other Services

- Finance and Information
- Leisure and Activity
- Trade, Transportation, and Utilities

- Education and Health
- Professional and Business

Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics.



Health Service sectors slightly expanded their shares in employment. Professional and Business Services is the key industry of the region, accounting for 60 percent of all metropolitan employment; this sector grew almost at par with overall employment. All other industries grew within regional norms.

The District is now the largest private employment center in the metropolitan region.

The District has always been the center of employment in the region, largely due to the presence of a large federal workforce. For the first time, in 2016, the District also became the top private sector employment center, with employment exceeding that of the previous leader, Fairfax County.

By 2018, private sector employment in D.C. stood at 534,225, growing by 86,287 since 2010 (or 19.3 percent, almost twice the rate of growth in the metropolitan region). Other strong performers in private sector employment include Arlington, which grew by nearly 17 percent, and exurbia in general, which grew by 15 percent. Among the core counties of the metropolitan region, Alexandria shrank by 4 percent, and the Maryland suburbs—especially Montgomery County—showed the weakest growth (below 7 percent).

The strongest performer in the region when it comes to employment growth has been Loudoun County. Loudoun began the 2010s with fewer employees than Arlington but ended with more, showing a remarkable growth rate of 28.6 percent. Much of that growth came from hiring by new establishments: between 2010 and 2018, Loudoun added nearly 3,300 new establishments—on par with Fairfax County. Given its relatively low starting point, this meant a growth rate of over 36 percent, or more than twice the rate of the second-best performers in terms of establishment growth, D.C. and Arlington.

The District is outperforming its immediate neighbors in private sector employment growth, but exurbia's role in the region's employment is rapidly increasing.

Looking at the counties and cities in the metropolitan region with more than 20,000 employees, we see that the District's employment growth between 2010 and 2018 was stronger than its neighbors in Maryland (Montgomery and Prince George's counties) and Virginia (Arlington and Fairfax counties, and the City of Alexandria). In 2010, Arlington, Fairfax, and Alexandria combined had 53 percent more private sector employment than in D.C.; in 2018, this lead had narrowed to 38 percent. The combined lead of Montgomery and Prince George's counties in Maryland declined from 27 percent to 14 percent.

In 2010, Fairfax County had an 11-percentage point lead in private sector employment over the District; in 2018, the District was ahead by one percentage point. In 2010, Montgomery County employed 8 workers for every 10 employed by D.C.'s private sector; in 2018, this ratio was 7 to 10. Compared to its neighboring jurisdictions, the District increased its lead in almost every sector between 2010 and 2018. The only exception is Arlington, which grew faster than the District in its private sector employment in Professional and Management Services, and Finance and Information.

Federal employment has always been the bread and butter of the District's employment. Contraction of the federal workforce is often seen as a major risk to D.C.'s economy (as happened in the 1990s).

But the city's current resilience in the face of federal employment contraction suggests that its economic strength is driven less by a single industry and more by a combination of factors, including better

financial management and a growing population and incomes.

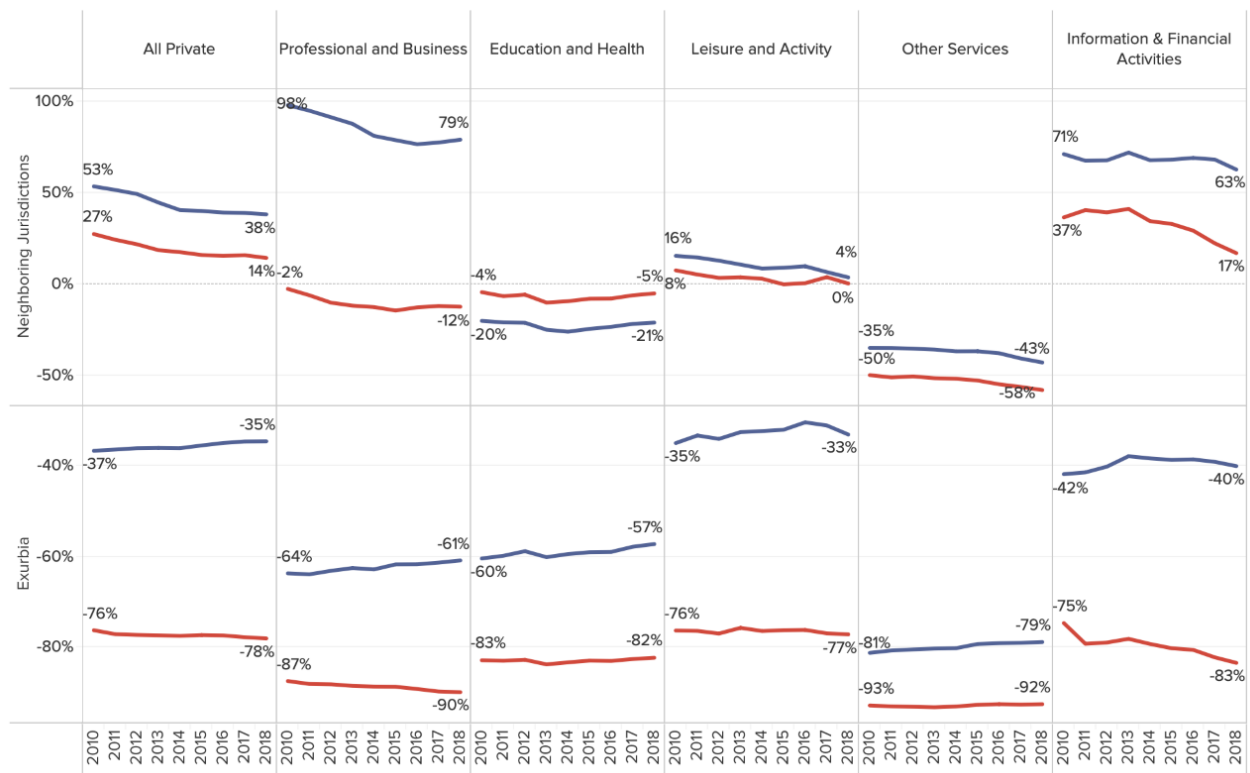
In exurbia, Loudoun and Prince William counties grew faster than the District in all major industries. The District's private sector employment was 75 percent greater than Loudoun County in 2010; this gap declined by two percentage points by 2018. Prince William's relative share increased by one percentage point. The District's lead over Loudoun declined by two percentage points in Professional Services and Education and Health Services; by three percentage points in Leisure and Activity; and by one percentage point in Other Services (a likely

consequence of rapid population growth and a relatively pro-business climate in Loudoun).

Has D.C.'s performance dipped in 2019?

So far, this regional analysis of employment trends has been based on administrative data that firms file with the Unemployment Insurance program. But these data come with a six-month delay and therefore only tell us the region's employment trends through the first half of 2018. A different data source that provides more recent information suggests that DC's employment growth may actually be slowing.

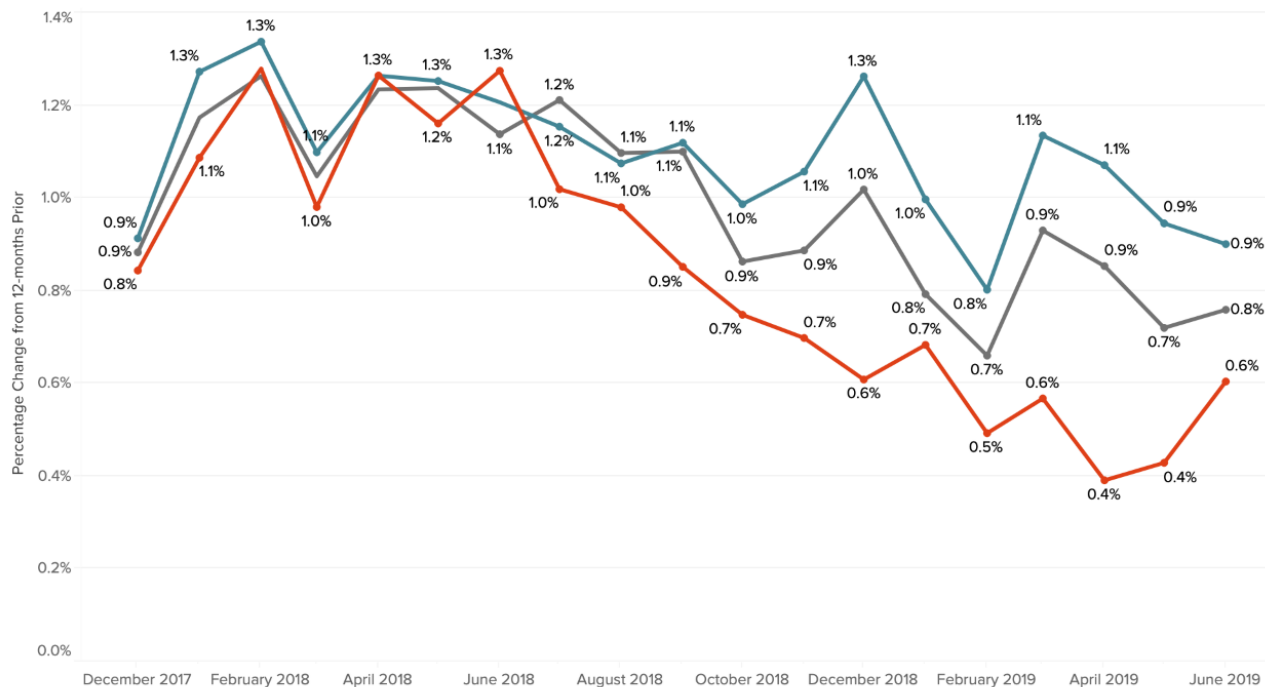
Percentage Difference of Private Employment in Large Employment Centers in the Metro Area from District's Private Employment
(negative figures indicate larger employment in DC)



Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics. The list includes counties and cities with over 20,000 in private sector employment.



Total Non-Farm Employment Growth: D.C., Washington Metropolitan Area and Metropolitan Division Percentage change from 12 months earlier



Source: Bureau of Labor Statistics, Current Employment Statistics, released on July 19, 2019.

■ D.C.
■ Metropolitan Division (excludes Montgomery and Frederick Counties)
■ Washington-Arlington-Alexandria, DC-VA-MD-WV



The Bureau of Labor Statistics also provides monthly survey data on employment trends, which provide more recent information (although they may be subject to revision later in the year).

These monthly employment data suggest that not only has the District's employment growth been slowing down over the past 12 months, it has been underperforming compared to regional growth since late 2018.

Through the first half of 2018, the District outperformed the region by an annualized growth rate of 1.28 percent. However, as the chart above shows, D.C. employment grew at just 0.6 percent between June 2018 and June 2019, compared to 0.82 percent in the broader metropolitan area.

The District, like all other jurisdictions that make up the metropolitan area, is a small, open economy, drawing from the strength of the region and constantly competing for jobs, workers, and residents. Our policies, investments, and actions reverberate across the metropolitan region, pushing or pulling businesses, workers, and residents into and out of our city. We must pay more attention to our position within the metropolitan region and judge our policies against the competitive forces that shape our economy.

Our forthcoming Competitiveness Initiative will explore these issues in the coming months.

What are top concerns for the businesses in the District and the Washington metropolitan area?

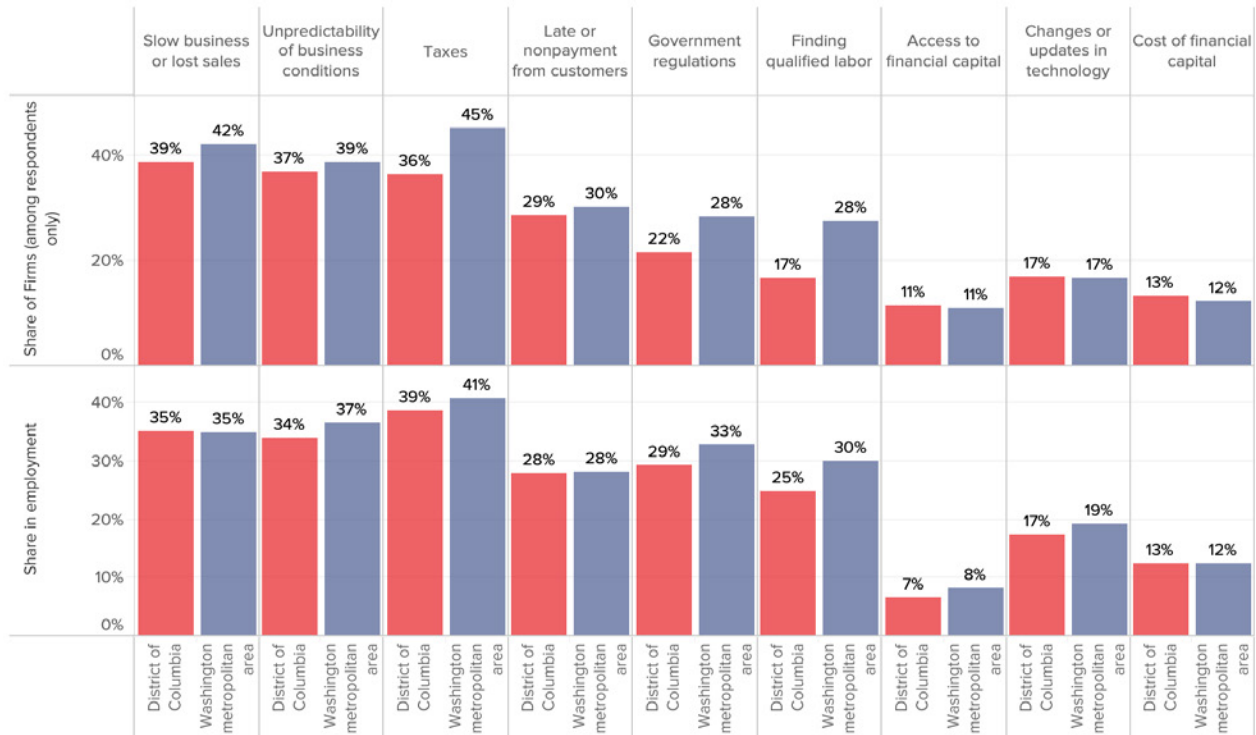
The U.S. Census Bureau's Annual Survey of Entrepreneurs asks firms about the factors that most negatively impact their profitability. The most recent data are from the 2016 and show that the top factors that D.C. firms report as negatively affecting their profitability are taxes, slow business or lost sales, and unpredictability of business conditions.

Larger firms are more likely to cite regulations and finding qualified labor as harming profitability compared to small firms. Firms of all sizes say late payment or nonpayment from customers have negative effects. Small firms are also more likely to say a lack of access to financial capital has harmed their profitability—about one in nine firms (11.4 percent) say this has had a negative impact, but this represents only

one in 15 firms (6.6 percent) based on employment share.

In the metropolitan area, businesses mention similar concerns, but more frequently. 45 percent of regional firms see taxes as a negative impact on profitability compared to 36 percent in the District. This need not, however, be an indication of the differential tax burdens on businesses, but more a reflection of the types of firms that have responded to the survey questions. The average D.C. firm in this sample had 23 employees compared to 17 for the average metropolitan area firm, and the D.C. firms paid slightly higher average salaries (\$78,000) than the metropolitan area firms (\$64,000).

Negative Impacts on Profitability Reported by Firms in D.C. and Washington Metropolitan Area



Source: U.S. Census Bureau, Annual Survey of Entrepreneurs, Characteristics of Businesses, 2016. The percentages are calculated for firms that have responded to the questions. For the District, the response rate was 49 percent; for the Washington metropolitan area, it was 61 percent.

■ District of Columbia
 ■ Washington metropolitan area



A LOOK AHEAD

Our plans for 2020

For 2020, we have an exciting program and agenda with thought-provoking and cutting-edge research on the District's economy, fiscal and business conditions, education, housing, transportation, and health. Here are four of our key projects:

REGIONAL COMPETITIVENESS AND BUSINESS DYNAMICS

The D.C. Policy Center is embarking on a major research initiative on regional business patterns and competitive dynamics in the Washington metropolitan area. Beginning in autumn 2019, we will publish a series of in-depth analyses on the changing role of the District of Columbia in the region's economic landscape. This research series will explore the regional entrepreneurship landscape, shifting trends in the city, business mobility across the region, and job and workforce flows. This initiative will culminate in a framework comprised of factors that District officials can use to effectively gauge if policies under consideration will support or hinder the District's continued status as the region's economic hub.

EDUCATION POLICY INITIATIVE

In 2019 and 2020, the Policy Center's Education Policy Initiative will focus on inclusivity and equity in D.C.'s public schools, centering on the question: How are schools creating opportunities for all students in the District of Columbia? Over the next two years, we will

explore the relationship between transportation and access to quality schools, reasons why families choose to exit public schools, high schools that are most effective at improving student outcomes, and whether the teacher pipeline can meet the needs of D.C.'s growing student enrollment.

In addition to its core research agenda, the Education Policy Initiative will play a role in the District's planned Education Research Practice Partnership by serving as an information resource for schools and education leaders on what to expect from and how to make most of the Partnership. Finally, the Education Policy Initiative is also launching a dedicated blog called "Schools by Numbers" that will engage independent academics, researchers, journalists, and policy practitioners to produce new data-driven analyses on cornerstone topics to inform education policy discussions in D.C.

RENTAL HOUSING POLICIES AND RENT CONTROL IN D.C.

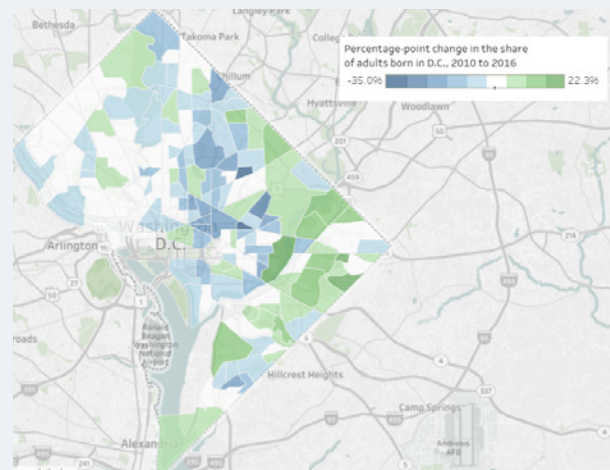
The D.C. Policy Center is launching a study to examine how rent control laws help or hinder housing affordability goals in the District of Columbia. The study, which is supported by the Apartment & Office Building Association of Metropolitan Washington, will take stock of the District's rental housing market to identify the key pressures on low- and middle-income residents, and how the District's current programs for renters are exacerbating or ameliorating these pressures.

D.C. POLICY CENTER FELLOWS

A home for new, independent analysis

The D.C. Policy Center's Fellows program provides an opportunity for independent researchers, journalists, academics, data enthusiasts, and other experts to produce analyses on vital local policy issues.

Our Fellows produce data-driven, D.C.-focused analyses on a variety of topics, and significantly expand the number of writers focused on D.C. policy issues. Over the course of 2018, the Fellows program has brought multiple voices, a depth of knowledge, and fresh approaches to emerging topics such as the opioid crisis, D.C.'s start-up ecosystem, employment barriers for returning citizens, and historical factors contributing to present-day racial inequities.



This map shows the percentage-point change in adults who reported they were born in the District, 2010-2016, from Fellow Mike Maciag's "Made in D.C."

THE WILKES FELLOWSHIP

Supported by a generous gift from D.C. Policy Center Board Chairman Charles "Sandy" Wilkes, Chairman of The Wilkes Company, the Policy Center will launch its Wilkes Fellowship to support a current or recent graduate student or other early-career researcher who wants to apply their experience and training to addressing key policy issues in the District.

Each Wilkes Fellow will be appointed for a one-year term, conducting original research and analysis on issues in one or more of the Policy Center's research focus areas. Their work will

be published by the D.C. Policy Center, and they will also participate in and contribute to the intellectual life of the Policy Center. They will receive a stipend, ongoing editorial and analytical support, and mentoring from D.C. Policy Center researchers.

Grateful for this gift, the Policy Center hope that other individuals and organizations will consider endowing a fellowship.

For more information on the Wilkes Fellowship, email us at info@dcpolicycenter.org.

2018 Financials

REVENUE AND EXPENDITURES, YEAR OVER YEAR

	<i>Actuals</i>			<i>Projected</i>
	2016	2017	2018	2019
REVENUE				
Donations and contributions	\$288,500	\$319,001	\$599,250	\$565,600
Foundation grants	--	\$107,000	\$177,000	\$655,000
Paid research	--	\$47,000	\$65,000	\$135,700
TOTAL REVENUE	\$288,500	\$473,001	\$841,250	\$1,356,300
EXPENDITURES				
Personnel (salaries and fringe)	\$58,137	\$563,681	\$729,549	\$851,700
Office operations	\$28,220	\$29,719	\$43,742	\$116,000
Program services	\$2,972	\$48,375	\$51,217	\$46,500
<i>Writing services</i>	\$1,000	\$35,500	\$12,000	\$30,000
<i>Meetings</i>	\$345	\$1,998	\$4,117	\$5,000
<i>Legal and consulting fees</i>	\$1,627	\$6,306	\$20,100	\$2,000
<i>Other project expenses</i>	--	\$4,553	\$15,000	\$9,500
TOTAL EXPENDITURES	\$89,329	\$641,757	\$824,508	\$1,014,200
NET OPERATING INCOME	\$199,171	(\$168,756)	\$16,742	\$342,100
FUND BALANCE	\$199,171	\$30,415	\$47,157	\$389,257

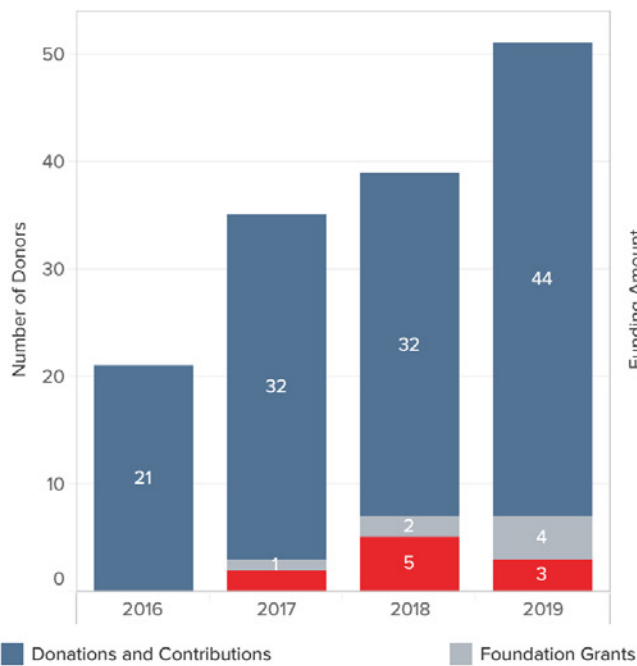
NOTES ABOUT OUR FINANCES

The D.C. Policy Center's fiscal year runs January 1 - December 31. All numbers presented herein are calculated on a cash basis.

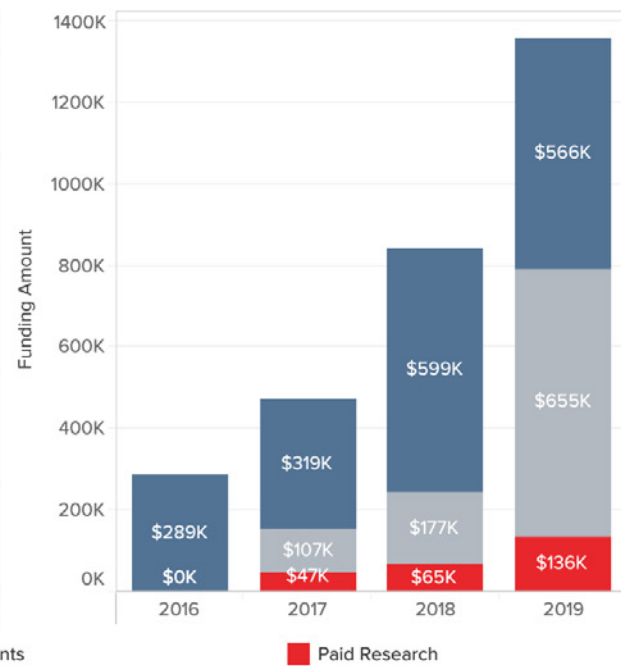
From its founding in 2016, through December 31, 2018, the D.C. Policy Center was a fiscally-sponsored project by the Federal City Council, a 501(c)(3) nonprofit organization. As of January 1, 2019, the Policy Center operates as an independent 501(c)(3) nonprofit. Our EIN is 82-2380479. For our up-to-date financial statements and Form 990, please visit our website at dcpolicycenter.org, or contact our offices at (202) 223-2233.

FUNDING SOURCES, YEAR OVER YEAR

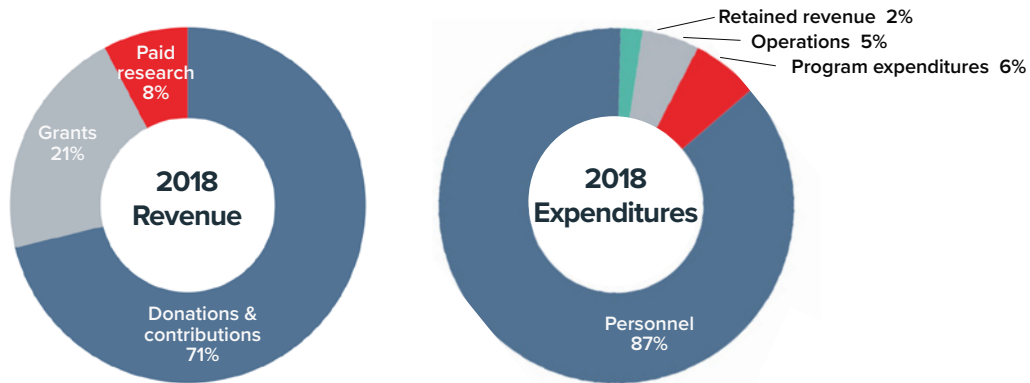
Number of Donors by Donation Type



Funding by Donation Type



REVENUE AND EXPENDITURES DETAIL, 2018



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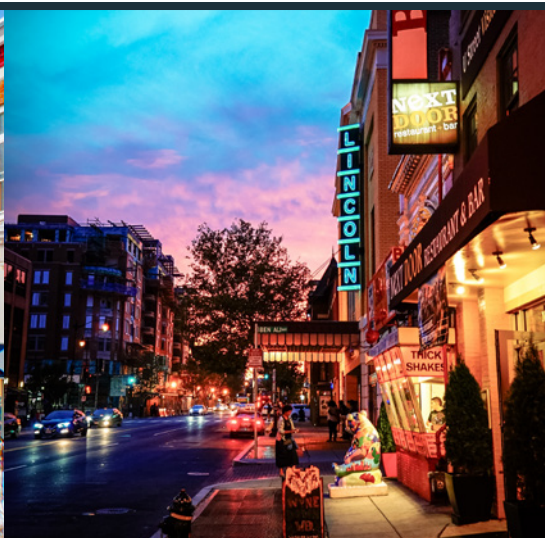
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