

SINCE  1973

LEADING AMERICA'S RESURGENCE



Building an America
where freedom,
opportunity,
prosperity, and
civil society flourish.

LEADING AMERICA'S RESURGENCE

THE HERITAGE FOUNDATION

SINCE  1973

THE HERITAGE FOUNDATION

*The Heritage Foundation might
be the biggest winner of 2016.*

— WASHINGTON EXAMINER, NOV. 10, 2016

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A MESSAGE FROM THE CHAIRMAN AND PRESIDENT

It was, by any measure, an extraordinary year. And for The Heritage Foundation, it was extraordinarily successful—not just in the national policy arena, but in the states and abroad as well.

At the state level, we helped expand school choice in Maryland and South Dakota. Mississippi passed a religious freedom law based on federal policy advanced by our scholars.

Testimony from our experts helped convince legislators to rein in stifling occupational licensing requirements in Tennessee and abuse-prone civil asset forfeiture practices in Florida, Nebraska, and California.

Right-to-work legislation, a signature issue for Heritage since our founding in 1973, passed in West Virginia and Wisconsin. As a result, the majority of states now no longer force workers to pay union dues as a condition of employment.

On the global scene, our Margaret Thatcher Center for Freedom, a strong force in Britain's Leave camp, helped pull off one of the year's greatest upsets: the June 23 Brexit vote that reasserted British sovereignty and reaffirmed the importance of the Special Relationship between the U.S. and the U.K. As Russia moved to supplant U.S. influence in the Middle East, our Allison Center for Foreign Policy launched a successful campaign to get Spain to stop resupplying Russian warships bound for Syria.

Our Asian Studies Center, too, had a most gratifying year, as the U.S. and our allies adopted many of our policy recommendations for restraining North Korea. In addition to toughening sanctions against the rogue regime, Washington and Seoul agreed to deploy THAAD missile defenses in South Korea, and two long-estranged allies—Japan and South Korea—agreed to share military intelligence. All of these developments will help counter the growing nuclear and missile threats from the North.

Here on Capitol Hill, we enjoyed success, too. Our newly established Center for National Defense carried the day in arguing against President Obama's request for additional troop reductions in the Army and Marine Corps. We were also influential in winning improved funding to address the serious military readiness problems identified in our *Index of U.S. Military Strength*.

When House Republicans launched a late-year bid to revive earmarks, we raised the alarm. Outraged conservatives responded, reminding lawmakers that they had just been elected to “drain the swamp, not fill it.” The grassroots backlash led lawmakers to abandon the attempt.

And, in what was one of the loneliest policy battles of the year, Heritage fought off, at least temporarily, the United Mineworkers' attempt to get the government to bail out their failing pension plan. The bailout could cost taxpayers hundreds of billions of dollars—and set a precedent that might wind up costing trillions more. Despite the high stakes, Heritage was the only organization willing to take on the union in public.

None of these victories came easy. Nor did they come by accident. All were the result of research, planning, and hard work.

[H]is transition effort has been professionally run by Heritage Foundation veterans Ed Feulner and Becky Norton Dunlop for many months. I have no doubt that he [President-elect Trump] will be surrounded by excellent, professional, serious people.

—MATT MACKOWIAK, *OBSERVER*, NOV. 9, 2016

PLANNING THE WORK; WORKING THE PLAN

Well before the year started, Heritage and Heritage Action for America prepared for success. Together we put together a 2016 work plan designed to spark—and lead—an American resurgence.

We presented the three-pronged strategy to our members at the December 2015 President's Club Meeting. They received it with great enthusiasm. Buoyed by their encouragement, we proceeded to execute the plan throughout the year.

Prong One was to set the agenda, promoting bold conservative policies that would stand in stark contrast to the failed progressive policies of the last decade. In January, we published *Solutions 2016*, a 244-page policy compendium presenting 277 specific recommendations to help put America back on the track to prosperity and greatness.

A STRONG PORTFOLIO OF CONSERVATIVE RESEARCH & POLICY



We also revived our Mandate for Leadership Series, issuing three wide-ranging policy guides over the course of the year:

Blueprint for Balance: A Federal Budget for 2017. Aimed at Congress and presidential candidates, this 187-page model budget detailed how Washington could cut federal spending by \$418 billion this year and get on track to end deficit spending in just seven years—without tax hikes.

Blueprint for Reform: A Comprehensive Policy Agenda. Timed to have maximum impact on the presidential candidates' transition teams, the 152-page document laid out the reforms and policies needed to strengthen national security and expand freedom, opportunity, and prosperity for all Americans.

Blueprint for a New Administration: Priorities for the President. This 70-page report recommended specific actions the next president could take *immediately* to reform executive branch operations in ways that strengthen free markets, national sovereignty, and civil society.

Prong Two was to prepare conservative candidates and members of Congress to embrace and advance these bold proposals. This entailed more than just explaining the policies and the rationale behind them. It also involved sharing the findings

of our American Perceptions Initiative, helping current and future lawmakers understand where the American people stand on these issues and how to win the broadest possible support for our policy solutions.

This phase started with our January policy retreat for conservative members of Congress. The following month, Heritage Action for America convened its annual Conservative Policy Summit, preparing their Sentinels to be effective advocates in their communities and in holding their lawmakers accountable for following through on their policy promises.

Throughout the year, Heritage worked to bring political candidates at all levels of government up to speed on our policy recommendations. We conducted 50 briefings for 11 presidential candidates and developed relationships with 23 conservatives running for congressional seats. Sitting Members of Congress benefited from 485 Heritage briefings.

The prep work continued after the elections. Heritage conducted a New Members Orientation program to cement understanding and relationships with Washington's newcomers, then hosted our first-ever policy retreat for Congress's most committed conservatives: members of the House Freedom Caucus.

Prong Three was born of our continuing optimism about our nation's future. The idea was that *if* the elections yielded a president amenable to start dismantling the progressive bureaucratic state erected over the last 50 years, he or she would need to hit the ground running.

To help make that possible, we committed to providing, not just the best *policy* advice, but the best *people* advice, too. After all, as Heritage President Ed Feulner has preached for years: "People Are Policy."

So, starting in the fall of 2015, Heritage Vice President Becky Norton Dunlop took on a major responsibility: running our Restore America Project. The goal was to amass and vet a portfolio of principled conservatives capable of assuming critical, appointive posts in the next administration.

Some 4,000 positions in the Executive Branch are filled by political appointees. Before completing the Restore America Project in early 2017, Becky and her team had turned over to the Trump transition team more than 5,000 resumes of outstanding conservative job candidates.

Becky was not alone in helping guide the Trump transition to a soft landing. Forty Heritage officers and staff members contributed their time and talents to the effort. Among those taking lead roles on the Trump Transition Team were Heritage Board Members Ed Feulner, Kay Coles James, and William L. Walton, as well as Distinguished Fellow Edwin Meese III and Group Vice President Ed Corrigan.

And, of course, we had a "Plan B." Confident that, if America didn't get a conservative government this time around, she will get one in the future, we continued preparing the leaders of tomorrow for the task of restoring America.

Our Young Leadership Program trained 184 interns. The Heritage Congressional Fellows program graduated its largest class of junior Hill staffers ever. And more than 100 senior Hill staff participated in the Madison Fellows Program, a continuing education experience we provide in cooperation with Hillsdale College.

We also launched a new program, the Feulner-Weyrich Fellowship, offering advanced training to senior congressional staff so that they can better help their members achieve critical policy objectives.

These are just some of the things we accomplished in 2016. The following pages give a fuller idea of the range and volume of our activities, all geared to help lead the way to a great American resurgence.

IN MEMORIAM:

Marion Wells

Marion provided Heritage with leadership and inspiration for a quarter century. In 1992, she agreed to co-chair the Heritage Legacy Society. With her help, the society has raised more than \$292 million in gifts and commitments. In 2003, she was elected to our Board, where she served with distinction until her death on Oct. 30.

Ed Noble

A man of exceptional foresight and generosity, Ed Noble was the last of Heritage's three founding investors. We will always be grateful for his willingness to invest in what was then just an idea: a research institute devoted to solving the nation's great problems by advancing policies based on conservative principles. He passed away on Dec. 4.

PASSAGES

- On May 2, 2017, Jim DeMint stepped down as President of Heritage. [See page 7.]
- The Hon. Belden H. Bell retired from the Board in 2016. However, he graciously agreed to remain as co-chair, along with his wife Rae, of the Heritage Legacy Society.
- We welcomed three new Trustees: Michael Gleba, of Pittsburgh, Pa. (joined the Board in January 2016); Ginger Heckman of Atlanta, Ga. (September), and Ryan Haggerty of Fort Worth, Texas (January 2017).

Organizationally, we made some changes as well.

- On Nov. 29, we formed a new Institute for Constitutional Government, comprising the Meese Center, the Simon Center and the Center on Public Opinion (home of our American Perceptions Initiative). The Institute's mission is to help stop—and begin to reverse—the current trend of power being increasingly concentrated in the federal government, especially within the executive branch.
- We also established two new research centers: the Center for Education Policy, under the direction of our Will Skillman Fellow in Education Lindsey Burke, and the Center for National Defense, led by Thomas W. Spoehr, a retired Army Lieutenant General.



CLOCKWISE FROM TOP LEFT: Former House Speaker Newt Gingrich discusses “Understanding Trump and Trumpism” in a December lecture in Allison Auditorium. Romina Boccia, our Grover M. Hermann Fellow, testifies February 2 before members of the House Financial Services Committee on how to use the debt limit to force reductions in federal spending. June 23: Heritage flew the Union Jack next to the Stars and Stripes to celebrate the Brexit vote in the U.K. In a July lecture at Heritage, Sen. Ben Sasse (R-Neb.) describes the downside of excessive occupational licensing requirements.

THE YEAR AHEAD

We achieved great success in 2016 because we prepared for it. And we are preparing for even greater success in 2017 and beyond.

Early signs are encouraging. President Trump’s nominee for the Supreme Court was drawn from a list of superior jurists compiled by Heritage and the Federalist Society. His “skinny budget” is clearly based on our *Blueprint for Balance*. And Congress has taken our advice and is finally exercising its powers under the Regulatory Control Act to roll back some of the excessive regulation of the Obama era.

We recognize, however, that no matter who sits in the Oval Office, it is the nature of today’s vast administrative state to seek more and more power over the people and the states. To halt and reverse that dangerous trend, we have launched a new research institute: the Institute for Constitutional Government. Its mission is to help our nation hold fast to the rule of law and the principles articulated by its Founders. That is the foundation of America, the essential framework that makes freedom possible.

Certainly, we look forward to working with the new Administration and the new Congress to strengthen civil society and to expand freedom, opportunity, and prosperity for all Americans. Yet we remain mindful that every new administration and every new Congress must be continuously reminded of their purpose, held to their promises, and kept on the right track.

Thanks to your generous support, Heritage and Heritage Action stand ready to do so throughout 2017.

Sincerely,



Thomas A. Saunders III
Thomas A. Saunders III
Chairman

Edwin J. Feulner
Edwin J. Feulner
President

DAVID HILLS/WILLIS BRETTZ/THE HERITAGE FOUNDATION



FAREWELL

Senator DeMint

ON MAY 2, 2017, JIM DEMINT STEPPED DOWN AS President of The Heritage Foundation. A hero to millions of conservatives nationwide, he had taken the helm at Heritage and was also elected Trustee on April 3, 2013, after a distinguished career in the U.S. House and Senate.

Heritage enjoyed many successes under Jim’s leadership, especially in this last year. We were positioned so that we could play a helpful and highly influential role in the transition of presidential power. As a result, Heritage has been credited with significantly shaping the makeup of the new administration’s Cabinet as well as its refreshingly clear-sighted policy positions on everything from the “skinny budget” proposal to regulatory rollbacks.

Jim also left his mark internally. Our various research centers were realigned into three major Institutes, each dedicated to one “leg” of the conservative “stool”—economics, defense and social issues. A fourth—the Institute for Constitutional Government—was assembled to assure that all of Heritage’s policy work would never stray from the principles set forth by our nation’s Founders.

While Jim has now left Heritage, we know that he will continue to fight the good fight, working tirelessly to make freedom, opportunity, and prosperity a reality for all Americans. And we here at Heritage will continue to lead in that same fight as well. It is, after all, our mission.

While the Board of Trustees searches for Heritage’s next leader, they have recalled Ed Feulner to serve as our president. Since Ed held the post for more than 35 years before turning over the reins in 2013, we have every confidence that Heritage won’t skip a beat in 2017, and that when the Board brings on his successor, Heritage will be well positioned to make the most of an even brighter future. 🇺🇸

JEFFREY MALET/PAUL MORSE/SHEILA COUGHEAD



HERITAGE BY THE NUMBERS



185

LECTURES & SEMINARS



810

TELEVISION INTERVIEWS



134

ISSUE BRIEFS



12,868,211

HERITAGE.ORG USERS



82

BACKGROUNDERS



17,610,446

DAILY SIGNAL READERS



25

LEGAL MEMORANDA



25 MILLION

DAILY SIGNAL VIDEO VIEWS



11

BOOKS



567,591

MORNING BELL SUBSCRIBERS



485

BRIEFINGS AND TESTIMONY



401,447

THE AGENDA SUBSCRIBERS



1,107

COMMENTARIES



2,058,204

HERITAGE FACEBOOK FANS



3,029

RADIO INTERVIEWS



577,600

HERITAGE TWITTER FOLLOWERS



JANUARY 1

Michael W. Gleba, Chairman/CEO, Treasurer, and Trustee of the Sarah Scaife Foundation, joins the Heritage Board of Trustees.

JANUARY 4

Heritage breaks ground on the development of the E.W. Richardson American Leadership Building. When completed, the six-story edifice will provide first-rate housing, lounges, and study rooms for 186 interns annually (62 per term). The ground floor will house three retail shops to serve residents, staff, and the local community.



JANUARY 5

Dr. Carson Holloway, Chairman of our Simon Center Council of Academic Advisors, publishes *Hamilton versus Jefferson in the Washington Administration* (Cambridge University Press).

JANUARY 6

Heritage kicks off its fourth year of hosting “Conversations with Conservatives,” a monthly meeting of journalists and conservative members of Congress. *Washington Times* reporter Jennifer Harper describes the sessions as an “oasis of calm and confidence on Capitol Hill ... led by a group of conservatives intent on transparency and problem-solving.”

JANUARY 11

Our Young Leaders Program welcomes the spring class of interns—62 strong. The 10-week program gives them practical experience in research, policy development, and communications, as well as a firm grasp of conservative values and principles.



TOP: David Azerrad, Director of our B. Kenneth Simon Center for Principles and Politics, discusses some of our nation's founding principles with members of our spring class of interns. BELOW: Interns pose for a group picture outside the Capitol at the end of one of several field trips taken during the spring semester.



JANUARY 13

Media Relations Director Sarah Mills hosts the year's first Newsmaker Breakfast. At the by-invitation-only event, Sen. Mike Lee (R-Utah) and Rep. Jim Jordan (R-Ohio) lay out a conservative legislative agenda for more than a dozen reporters.

JANUARY 13

Senior Research Fellow Bruce Klingner testifies before the House Foreign Affairs Committee on "Moving Beyond Timid Incrementalism: Time to Fully Implement US Laws on North Korea."

JANUARY 14

Heritage launches the Feulner-Weyrich Fellowship, a six-month-long advanced training program for senior-level, conservative congressional staff. Every week, the program brings in leaders from Capitol Hill to help the 16 Fellows master a variety of skills needed to navigate the legislative process and help their Members influence policy.

JANUARY 27

Will Skillman Fellow Lindsey Burke and Education Policy Analyst Mary Clare Reim mark National School Choice Week by hosting a research roundtable on Capitol Hill. The event allows leading academics to present the latest research on school choice to other practitioners and Hill staffers working on education reform.

JANUARY 27–29

A major snowstorm cripples travel throughout the Capitol region. Still, 24 members of Congress brave a trip to Middleburg, Va., to attend our Conservative Members Retreat. One highlight: Jim DeMint led a discussion of the upcoming budget debate, featuring the Chairmen of the Republican Study Committee, the House Freedom Caucus, and the House Budget Committee. This conversation proved to be the catalyst for a successful conservative push to block higher spending in the 2016 budget deal. Heritage also shared research from our American Perceptions Initiative regarding public opinion on matters ranging from economic freedom and education policy to gender identity laws and religious liberty. The presentation also explored how best to talk about these often emotionally charged issues.



Jim DeMint (center) leads an informal discussion of how to frame contentious social issues during the Conservative Members Retreat in Middleburg, Va.

JANUARY 29



Heritage releases *Solutions 2016*, a comprehensive, 244-page compendium of 277 specific policy recommendations to strengthen national security, roll back the federal leviathan and help put America back on the track to prosperity and greatness. It becomes the go-to briefing book for conservative political candidates. One hugely popular feature: pocket cards featuring key facts and market-tested talking points covering nearly 40 different issues—all drawn from research done for our American Perceptions Initiative.

FEBRUARY 1



House Ways and Means Chairman Kevin Brady (R-Texas) keynotes the launch of the *2016 Index of Economic Freedom*. Perennially Heritage's most widely read publication, the 2016 Index generates hundreds of news stories and inspires discussions of economic policy reform worldwide.

FEBRUARY 1

The House passes the Fair Investment Opportunities for Professional Experts Act (H.R. 2187) to increase the number of accredited investors who can participate in private offerings of securities. The measure is based, in part, on the recommendations of Senior Fellow David Burton, whose work focuses on ways to improve entrepreneurs' access to capital.

FEBRUARY 2

Lomas Senior Research Fellow Steven Groves testifies before the House Committee on Science, Space and Technology on “Paris Climate Promise: A Bad Deal for America.”

FEBRUARY 2

Distinguished Visiting Fellow Stephen Moore testifies before the House Ways and Means Committee on cutting the corporate tax rate.

FEBRUARY 3

At the Heritage Action Policy Summit, House Speaker Paul Ryan calls for a truce with conservatives, saying that Republican infighting only benefits the Obama agenda. *The Washington Post* notes that “the annual Heritage summit ... helps set the tone for conservative policymaking on Capitol Hill.”



Scenes from the Heritage Action Policy Summit. TOP: House Speaker Paul Ryan (R-Wis.) delivers the keynote address in Allison Auditorium. BOTTOM: (left to right) Reps. Marlin Stutzman (R-Ind.), Ron DeSantis (R-Fla.), and Sen. Jeff Flake (R-Ariz.) discuss “Chamber Swap: Making the Change from House to Senate.”



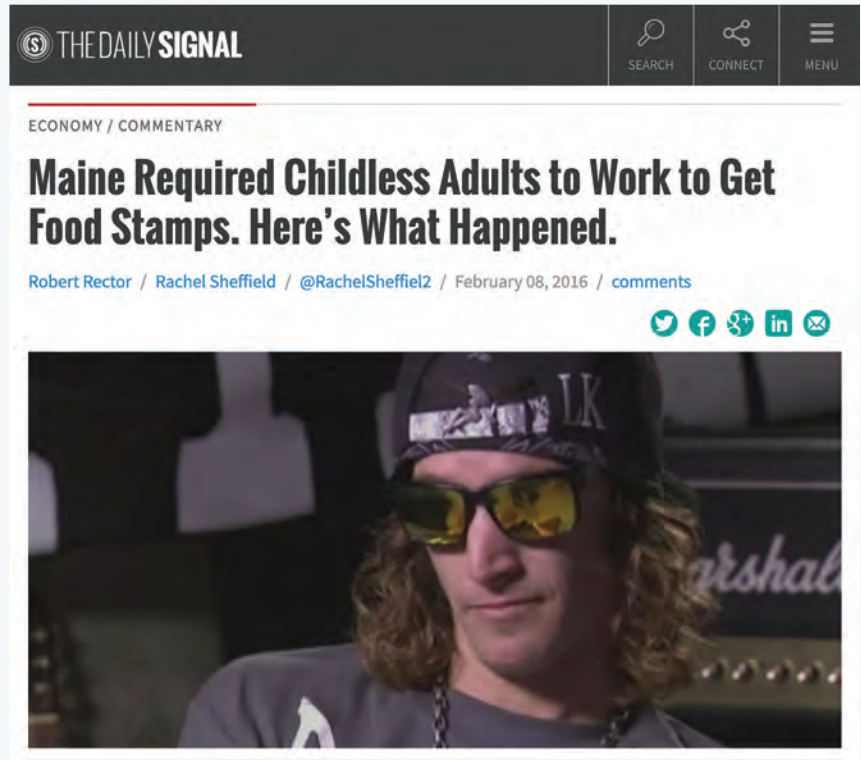
FEBRUARY 4

The Edwin Meese III Center for Legal and Judicial Studies and the Asian Studies Center co-host, with UC Berkeley’s Korea Law Center, *Island Disputes: Western Pacific*. The day-long conference exploring U.S. and allied responses to disputes in the Sea of Japan and the South China Sea brings together experts from House and Senate Armed Services Committees, foreign embassies, academia, and the U.S. Pacific Command.

FEBRUARY 5

Heritage convenes the first meeting of the 2016 Congressional Fellowship, a year-long, 24-session lecture and discussion series designed to give junior congressional staffers a firm grounding in First Principles and how they apply to today’s policy debates.

FEBRUARY 8



THE DAILY SIGNAL


SEARCH CONNECT MENU

ECONOMY / COMMENTARY

Maine Required Childless Adults to Work to Get Food Stamps. Here's What Happened.

Robert Rector / Rachel Sheffield / @RachelSheffield2 / February 08, 2016 / comments

Twitter Facebook RSS LinkedIn Email



The Daily Signal runs “Maine Required Childless Adults to Work to Get Food Stamps. Here’s What Happened.” Reported by Senior Research Fellow Robert Rector and Policy Analyst Rachel Sheffield, the “workfare” success story generates tremendous interest, ultimately getting nearly 637,000 page views. Kansas and Indiana later followed Maine’s example, and both realized steep drops in their food-stamp rolls.

FEBRUARY 12

Right-to-work legislation finally holds sway in the majority of states, as West Virginia becomes the 26th state to give workers the option of not paying union dues or fees as a condition of employment. Since our founding in 1973, Heritage has been a leader in the right-to-work movement. Though a temporary injunction halted implementation of the West Virginia law in August, by then another state—Wisconsin—had overcome its own legal challenge.

FEBRUARY 13

Heritage mourns the sudden passing of Supreme Court Justice Antonin Scalia. In over two dozen interviews, scholars from the Edwin Meese III Center for Legal and Judicial Studies help the media explain the significance of this conservative legal titan and the repercussions of this unexpected vacancy on the Court.

FEBRUARY 18

President Obama signs the North Korea Sanctions and Policy Enhancement Act. It contains several recommendations of Asian Studies Center expert Bruce Klingner, who has long advocated imposing stricter sanctions on Pyongyang as punishment for continuing its nuclear weapons and ICBM development programs.

FEBRUARY 23

Heritage unveils *Blueprint for Balance: A Federal Budget for 2017*, the first in our Mandate for Leadership series of reports aimed at helping the next administration and Congress restore fiscal responsibility to the federal government. The 187-page Blueprint would lower federal spending by \$418 billion and put Washington on track to end deficit spending in just seven years—without tax hikes.



Widely covered when first released in February, Heritage's *Blueprint for Balance*, captured headlines anew in January 2017 when Washington reporters and pundits pegged it as the blueprint for President Trump's "skinny budget."

FEBRUARY 23

Will Skillman Fellow Lindsey Burke publishes a Special Report, "Common Core and the Centralization of American Education." Marshalling the latest research on educational outcomes, she argues that the only "common standard" needed to improve education is parental empowerment and choice—"choice among schools, teaching methods, and, critically, curricula."

FEBRUARY 24

President Obama signs the Trade Facilitation and Trade Enforcement Act, permanently barring state and local governments from taxing access to the Internet. The measure also bolsters protections for American intellectual property rights—reforms long championed by Heritage.

FEBRUARY 29

Scholars in our B. Kenneth Simon Center for Principles and Politics publish two major works: "Hamiltonian Constitutional Interpretation: In Defense of Energetic and Limited Government," a First Principles paper by Dr. Carson Holloway, and *A Brief History of the Cold War*, by Dr. Lee Edwards and Elizabeth Edwards Spalding.

Dr. Lee Edwards, our Distinguished Fellow in Conservative Thought, discusses his latest book, *A Brief History of the Cold War*.



FEBRUARY 29

Daily Signal Senior News Reporter Melissa Quinn posts a video on Facebook: the real-life horror story of a police chief whose truck was seized by law enforcement. Within days, this cautionary tale of the perils of civil asset forfeiture garners over a half-million views.

MARCH 2

The U.N. Security Council unanimously adopts Resolution 2270, imposing fresh sanctions on North Korea in response to its Jan. 6 nuclear test. South Korea enacts a law promoting human rights in North Korea. Both polices were championed by the Asian Studies Center’s Bruce Klingner.

MARCH 2

Visiting Fellow Sarah Torre addresses a pro-life rally in front of the Supreme Court as the Justices hear oral arguments on *Whole Woman’s Health v. Hellerstedt*, the Court’s first major abortion-regulation case since 2007. Legal Fellow Elizabeth Slattery publishes “Abortion, Admitting Privileges, and the Supreme Court,” a Legal Memorandum explaining the legal challenge in layman’s terms. Unfortunately, the Court would later strike down Texas health and safety standards for abortion clinics.

Sarah Torre has been doing some terrific work at Heritage, this week on the Texas abortion case before the [Supreme] Court is one example. Keep an eye out for her byline and work.

—KATHRYN JEAN LOPEZ,
NATIONAL REVIEW ONLINE,
MARCH 4



MARCH 2

Senior Legal Research Fellow Paul Larkin testifies before the House Committee on Oversight and Government Reform on “Geolocation Technology and Privacy.”

MARCH 10

Senior Legal Research Fellow Lisa Curtis testifies before the U.S.-China Economic and Security Review Commission on “China’s South Asia Strategy: Drivers, Reactions, and Implications.”

MARCH 11

Our George C. Marshall Fellowship Program enters its fifth year of operation. Running from March to September, the program prepares rising young conservatives from various professions to fill future leadership roles in national security and foreign policy.

MARCH 13

Herbert and Joyce Morgan Fellow Nicolas Loris testifies before the Subcommittee on Energy and Subcommittee on Oversight regarding “Department of Energy Oversight: The DOE Loan Guarantee Program.”

MARCH 15

David P. Goldman (a.k.a. Spengler) delivers the first of Heritage’s biannual Russell Kirk lectures. His topic: “The Cultural Roots of American Power.”

MARCH 15

Legal Fellow Elizabeth Slattery testifies before the House Judiciary Committee's Task Force on Executive Overreach on "Executive Overreach in Domestic Affairs Part I—Health Care and Immigration."



MARCH 16

Senior Fellow Dr. Robert E. Moffit testifies before the House Ways and Means, Subcommittee on Health on "Preserving and Protecting Medicare."

MARCH 16

Senior Fellow Dr. John O'Shea publishes "Overcoming Challenges to Physician Payment Reform in a Post-GR World" and is promptly invited to speak at the 2016 American College of Surgeons Leadership and Advocacy Summit. His Backgrounder is the only outside paper distributed at the national conference.

MARCH 17

Our Edwin Meese III Center for Legal and Judicial Studies hosts six members of Congress for a discussion of the negative consequence of the Chevron Doctrine (named after a 1984 Supreme Court case that gave agency officials inordinate power to self-legislate). Immediately following the event, the participating lawmakers—Reps. Bob Goodlatte (R-Va.), Tom Marino (R-Pa.), and John Ratcliffe (R-Texas), and Sens. Orrin Hatch (R-Utah), Chuck Grassley (R-Iowa), and Mike Lee (R-Utah)—returned to the Capitol and introduced corrective legislation: the Separation of Powers Restoration Act of 2016.

Lecturing at Heritage, Rep. Tom Marino, (R-Pa.) (LEFT) and Rep. John Ratcliffe (R-Texas) (RIGHT) outline ways in which the Chevron Doctrine has upset the balance of power within the federal government.



MARCH 17

Syndicated columnist George Will highlights the work of Legal Research Fellow Paul Larkin on over-criminalization—a practice that, as Larkin puts it, “deprive[s] the criminal law of the moral force necessary for it to persuade people to respect and obey its commands.”

MARCH 23

Visiting Fellow Sarah Torre (bottom photo below) is back on the steps of the Supreme Court, this time addressing a rally held during oral arguments for *Zubik v. Burwell*. The case will determine whether the Little Sisters of the Poor will have to abide by Obamacare’s mandate that they provide abortion-inducing drugs as part of their health coverage.



MARCH 30

Our Center for National Defense hosts a day-long symposium on “The Role of Intelligence.” Among the featured speakers are former NSA and former CIA Director Gen. Michael V. Hayden, USAF (ret.), former U.S. Attorney General Michael B. Mukasey, and former Assistant to the President for National Security Affairs Stephen J. Hadley.

MARCH 30

Research Fellow Dr. David Muhlhausen’s work emphasizing the need to base policy decisions on scientifically valid data culminates in the enactment of the Evidence-Based Policymaking Commission Act. The new law establishes a commission of professionals to review federal agencies’ use of data and statistics in decision making and recommend needed improvements to Congress and the President.

MARCH 31

Walter Lohman, Director of our Asian Studies Center, testifies on “Chinese and Regional Responses to the U.S. Rebalance to Asia,” before the U.S.-China Economic and Security Review Commission.



APRIL 1

William E. Simon Senior Research Fellow Ryan T. Anderson accepts Benedictine College's "Pope John Paul the Great Award."

APRIL 1

Florida Gov. Rick Scott signs a law requiring law-enforcement agencies to file criminal charges against people before seizing and keeping their property. Civil asset forfeiture has a long history of abuse, and Heritage's Paul Larkin and Jason Snead have been strong voices in the national campaign for reform arguing that forfeiture laws present a moral hazard, tempting law enforcement agencies to seize assets without proof of any criminal activity on the part of the owners.

APRIL 7-9

Heritage convenes its Annual Leadership Conference, held this year at the Ritz-Carlton on Amelia Island, Florida. Guest speakers include Govs. Phil Bryant (Miss.), Paul LePage (Maine), and Rick Scott (Fla.), Rep. Mark Meadows (R-N.C.), Sen. Joni Ernst (R-Iowa), Carly Fiorina, Mark Levin, and many more. Other highlights include the presentation of member recognition awards to James and Melisha McAlister of Hartville, Ohio (the John Von Kannon Patriot Award.), the Lynde and Harry Bradley Foundation (the Founders Award, Michael Grebe accepting), and the late Terence Hamm Murphree of Bellville, Texas (the George Washington "Generation's Yet Unborn" Award).

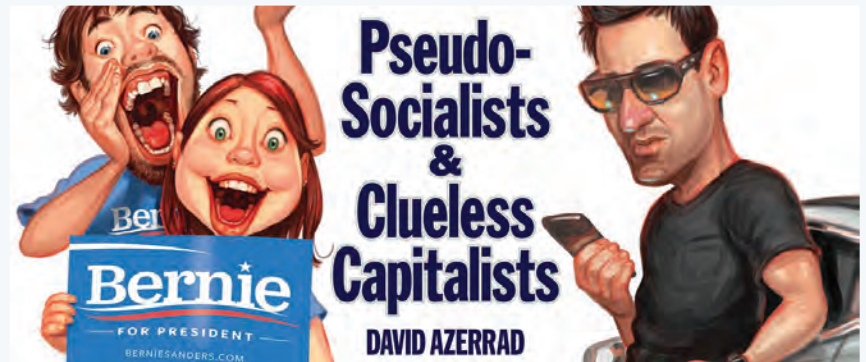


CLOCKWISE, FROM TOP LEFT: Among the featured speakers at the 2016 Annual Leadership Conference were: Florida Gov. Rick Scott (shown here with Associate Member Chuck Watkins of Oregon); businesswoman and presidential candidate Carly Fiorina; Mississippi Gov. Phil Bryant, and lawyer, author, radio host Mark Levin.

JEFF WESCOTT

APRIL 11

“The New Red Scare” by Dr. David Azerrad, Director of our B. Kenneth Simon Center for Principles and Politics, claims the cover of *The Weekly Standard*. The essay explores the differences between “old school” socialism and “newfangled American ‘socialism’” popularized by Sen. Bernie Sanders.



APRIL 12

Our Restore America Project, helmed by Becky Norton Dunlop, files its 1,000th vetted resume. The presidential personnel initiative continues to inventory reliable conservatives highly qualified for senior positions in the next administration. Leaders like Steve Forbes, Kay Coles James, and Gary Bauer are among the more than 200 trusted contacts recommending candidates to the project.

APRIL 13

Nina Owcharenko, Director of our Center for Health Policy Studies, briefs the House Republican Task Force on how to craft a conservative health care reform plan. Two months later, the Task Force report endorses many Heritage recommendations, including: repeal of Obamacare; tax relief for those purchasing their own health insurance; transforming Medicaid into a budgeted program, and expanding private coverage options for seniors.

APRIL 13

In Heritage’s first “Facebook Live” video interview, Jim DeMint talks about his *USA Today* column on the growing threat to religious liberty. The column argues that America needs more leaders, like Mississippi Gov. Phil Bryant, who are willing to stand up to extremists caricaturing religious freedom bills as “anti-gay”—when in reality they take nothing away from anyone.

APRIL 13

Jay Kingman Senior Research Fellow Brett Schaefer testifies on “Peacekeepers: Allegations of Abuse and Absence of Accountability at the United Nations” before the House Committee on Foreign Affairs’ Subcommittee on Africa, Global Health, Global Human Rights, and International Organizations.

APRIL 19

In another victory for asset forfeiture reform, Nebraska goes a step further than Florida, requiring law enforcement agencies to get a criminal conviction before taking property. Five months later, on Sept. 29, California follows Nebraska’s example.

APRIL 19–20

Our Center for Legal and Judicial Studies hosts its Spring Legal Strategy Forum in Philadelphia. There, 45 CEOs of the freedom-based public interest legal movement hear presentations from leading legal scholars, three State Solicitors General and more. Breakout sessions explore a variety of topics, from religious liberty, free speech and equal protection, to economic liberties and property rights.

APRIL 20

Our Newsmaker Breakfast, a monthly event at Heritage, features Texas Gov. Greg Abbott and Heritage Senior Legal Fellow Hans von Spakovsky. The two discuss Texas' legal challenge of President Obama's executive amnesty order—argued just two days earlier before the Supreme Court.

APRIL 20–22

More than 450 conservative think tank leaders, policy experts, influencers and activists gather in Loews Philadelphia Hotel for the 39th annual Resource Bank Meeting. The Heritage-hosted event gives conservative leaders an opportunity to discuss the latest victories and reforms underway in labor, tax, education, and welfare policy, and to develop strategies to move forward on these and other issues. Workshops cover “best practices” in fundraising, social media, and marketing. Carly Fiorina, Walter Williams, and Kansas Gov. Sam Brownback are among the more than 70 featured speakers. Reviewing the event, the *American Spectator* later writes: “When Heritage does something, they always do it right.”



CLOCKWISE, FROM TOP LEFT: At the 2016 Resource Bank Meeting: Ismael Hernandez, Founder and Executive Director of the Freedom & Virtue Institute, reconnects with Heritage Distinguished Fellow Becky Norton Dunlop; filmmakers Ann McElhinney and Phelim McAleer discuss their latest movie, “Gosnell: America’s Biggest Serial Killer”; Heritage Vice President Bridgett Wagner welcomes all at the opening session; participants celebrate completion of the “Rocky Run” up the steps of the Philadelphia Museum of Art.



JASEN HANSON



APRIL 20

Heritage honors the Foundation for Individual Rights in Education (FIRE) with its 2016 Salvatori Prize for American Citizenship. Presenting the \$25,000 prize to FIRE President and CEO Greg Lukianoff, Dr. David Azerrad, Director of our Simon Center for Principles and Politics, notes: “Last year, free speech was threatened as never before on campuses across America. Yet, at every turn, FIRE was there, pushing back, defending free speech, legal equality, due process, religious liberty and sanctity of conscience—the rights essential to individual liberty.”

APRIL 25

A North Carolina district court judge rules in favor of the state’s voter ID law. The nearly 500-page opinion extensively cites the work of Senior Legal Fellow Hans von Spakovsky on election integrity issues.

actually sought photo-ID in those states, (id. at 43-50). In his mind, this suggested that those States’ no-match lists were seriously inflated. (See id.) As a final example, Mr. von Spakovsky claimed that he himself would have appeared on the “no-match list,” as the name on his registration was “Hans A. Von Spakovsky,” while his DMV issued ID listed his name as “Hans Anatol von Spakovsky.” (Id. at 49.) He concluded his testimony by claiming that other western democracies require voters to present photo ID, including Canada and Mexico. (Id. at 51.)

Francis De Luca, president of the Civitas Institute in North Carolina, and who holds a master’s degree in political science,

APRIL 26

In the Longworth House Office Building, Senior Research Fellow Dr. Norbert Michel presents *The Case Against Dodd-Frank: How the ‘Consumer Protection’ Law Endangers Americans* to a roomful of House staffers. A clarion call for wholesale reform of financial regulation, it features chapters by Heritage experts as well as outside scholars such as AEI’s Peter Wallison, Cato’s Mark Calabria, and George Mason University’s J. W. Verret.

MAY 3

In San Antonio, Texas, Will Skillman Fellow Lindsey Burke gathers a coalition of experts to strategize on how best to advance universal education savings accounts (ESA) in the Lone Star state. Two days later, she assembles a similar meeting in Houston. Arising from these meetings: a draft universal ESA bill that will be introduced in the 2017 legislative session.

MAY 5

Tennessee Gov. Bill Haslam signs the Right to Earn a Living Act, rolling back some of the state’s excessive occupational licensing requirements. Under Tennessee law, more than 100 occupations—from auctioneering to shampooing hair—required licensure. The Act’s prologue echoes the arguments made by our Visiting Legal Fellow John-Michael Seibler: “The right of individuals to pursue a chosen business or profession, free from arbitrary or excessive government interference, is a fundamental civil right.”

MAY 16 The DeVos Center for Religion and Civil Society reaches thousands of lawyers, academics, and reporters through a series of live teleconferences and podcasts analyzing the Supreme Court’s decision in *Zubik v. Burwell*—a victory for the Little Sisters of the Poor, whose right to live out their religious beliefs had been trampled by Obamacare’s abortion-inducing drug mandate.

MAY 16 The Roe Institute publishes “Federal Budget in Pictures.” Says RealClearPolicy: “The Heritage Foundation’s ‘Federal Budget in Pictures’ enables all Americans to better understand the federal budget and identify important areas of reform.”

MAY 16 The Heritage Foundation Facebook account attracts its 2 millionth fan. No other think tank comes close to matching that following on the popular social media platform.

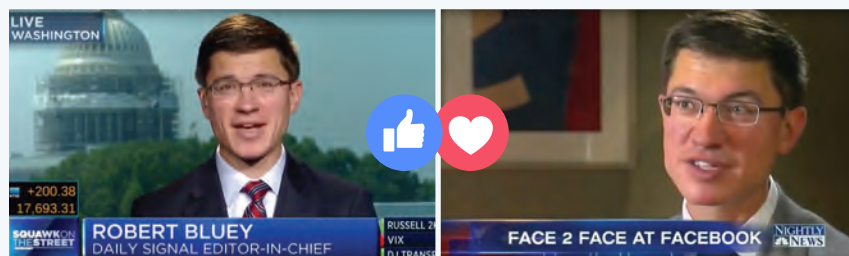
MAY 17 The Acton Institute names Dr. Ryan Anderson, our William E. Simon Senior Research Fellow in American Principles and Public Policy, the winner of its 2016 Novak Award. The award recognizes young scholars who have contributed original and rigorous research that advances understanding of theology’s connection to human dignity and the importance of limited government, religious liberty, and economic freedom.



MAY 18 Sen. Mike Lee (R-Utah) introduces four amendments to the Senate Transportation, Housing and Urban Development appropriations bill. All have been taken directly from Policy Analyst Michael Sargent’s transportation chapters in *Blueprint for Balance: A Federal Budget for 2017*. The amendments would cut funding for Amtrak, the Appalachian Development Highway System, rail and transit grants, and TIGER grants—programs that are wasteful or more properly the responsibility of state or local government.

MAY 18 Heritage’s Jim DeMint and Vice President Rob Bluey meet with Facebook CEO Mark Zuckerberg at Facebook HQ in Menlo Park, California. Joined by 14 other conservative media leaders, they discussed allegations of anti-conservative bias within the social media giant. Bluey gave nearly 30 broadcast interviews about the meeting, including appearances on CBS Evening News, NBC Nightly News and CBS This Morning.

Rob Bluey outlines concerns about suppression of conservative content on Facebook on CNBC’s “Squawk Box” (LEFT) and NBC Nightly News (RIGHT).



MAY 18

Heritage launches the Heritage Floor Report; a daily email for Capitol Hill offices, it pairs Heritage Issue Briefs and Backgrounders with scheduled House floor votes.

MAY 19

NATO foreign ministers sign the Accession Protocol for Montenegro—a historic step on the Balkan nation’s path to membership in the strategic alliance. The Thatcher Center for Freedom has been at the forefront of the drive for Montenegro’s accession.

MAY 19

Senior Legal Research Fellow Paul Larkin testifies on “Settling the Question: Did the Bank Settlement Agreements Subvert Congressional Appropriations Power?” before the House Committee on Financial Services, Subcommittee on Oversight and Investigations.

MAY 23

Senior Research Fellows James Gattuso and Diane Katz release the latest installment in their annual report: “Red Tape Rising.” The Drudge Report immediately highlights a key finding: Federal regulations issued in 2015 will cost the economy more than \$100 billion annually.

MAY 23

Our summer intern class reports for duty. The 66 young conservatives come from more than 62 schools.



TOP: Summer Intern class picture. BOTTOM RIGHT: Andrew Egger and Alexa Vance enjoy a special “perk” for interns—media training in our George T. Elmore Family TV Studio. BOTTOM LEFT: A field trip to Mount Vernon was one of many highlights in the summer intern experience.

ROB CANNON/WILLIS BRETZ

MAY 24 Jay Kingham Fellow Brett Schaefer testifies before the Senate Committee on Commerce, Science, and Transportation on “Examining the Multi-stakeholder Plan for Transitioning the Internet Assigned Number Authority.”

JUNE 1 The U.S. declares North Korea to be a “primary money-laundering concern”—a designation that Bruce Klingner has advocated for years. The announcement is accompanied by proposals to further impede Pyongyang’s access to international banks, thereby keeping it from laundering money for use in its nuclear weapons program.

JUNE 3 Bridgett Wagner, our longtime Director of Coalition Relations, takes over as Vice President for External Relations. Her predecessor, Becky Norton Dunlop, was earlier named our Ronald Reagan Distinguished Fellow.

JUNE 6 The summer issue of *National Affairs*, a leading journal of conservative public policy, publishes Dr. David Azerrad’s essay on “How Equal Should Opportunities Be?” Pushing back against the Left’s expansive understanding of the term, the piece outlines the proper scope of an opportunity agenda. The thought-provoking piece prompts an invitation to lecture on the topic at Harvard University’s Program on Constitutional Government.

JUNE 6 Senior Research Fellow John “JV” Venable publishes *Breaking the Trust Barrier: How Leaders Close the Gaps for High Performance* (Berrett-Koehler).



JUNE 9 Sen. Mike Lee (R-Utah) and Rep. Jim Jordan (R-Ohio) introduce the Welfare Reform and Upward Mobility Act. The proposal includes many Heritage reform recommendations, such as strengthening work requirements for welfare recipients and establishing an overall spending limit on means-tested welfare programs.

Rep. Jim Jordan (R-Ohio) answers questions about his welfare reform proposals at “Conversations with Conservatives,” a monthly press conference hosted by Heritage and *The Daily Signal*.



JUNE 9 Senior Research Fellow Lisa Curtis testifies on U.S.-Sri Lanka relations before the House Foreign Affairs Committee, Asia Pacific Subcommittee.

JUNE 16

Research Fellow James Sherk testifies on the NLRB's new Joint Employer standards before the Senate Committee on Small Business and Entrepreneurship.

JUNE 21

Heritage's Rumpel Senior Legal Fellow Alden Abbott testifies before the Senate Judiciary Committee, Subcommittee on Antitrust, Competition Policy, and Consumer Rights on "The CREATES Act: Ending Regulatory Abuse, Protecting Consumers, and Ensuring Drug Price Competition of 2016."

JUNE 23

Citizens of the United Kingdom vote to leave the European Union. Dr. Nile Gardiner, Director of our Margaret Thatcher Center for Freedom, hails the vote as "a victory for sovereignty, economic freedom, and self-determination." Thatcher Center scholars had advocated the exit for more than a decade and worked closely with the Brexit campaign from its beginning.



JUNE 27

The Washington Post profiles *The Daily Signal* as "the news organization with an independent voice." Over the course of the year, that digital print voice was magnified by 455 broadcast interviews of *Daily Signal* reporters discussing their latest stories.

JUNE 29

Policy Analyst Brian Slattery, a long-time advocate of stronger transatlantic security ties, notches a win as the U.S. signs a security cooperation agreement with Iceland. The U.S. reaffirmed its commitment to the defense of Iceland, while Iceland agreed to continue letting the U.S. and NATO use its facilities to reinforce mutual security.

JULY 6

Our Edwin Meese III Center for Legal and Judicial Studies hosts its 15th annual Scholars & Scribes event. Two panels—one composed of advocates who argue cases before the Supreme Court, the other featuring journalists who cover the court—review the most significant cases from the Court's last term, emerging trends among the Justices' rulings, and the consequences of the sudden passing of Justice Antonin Scalia.

JULY 7

Rep. Evan Jenkins (R-W.Va.) introduces the Transparency and Honesty in Energy Regulations Act, a bill that would ban energy rule-makers from considering the “social cost” of carbon and methane. The bill was prompted by an April 7 report on “Empirically Constrained Climate Sensitivity and the Social Cost of Carbon,” authored by Dr. Kevin Dayaratna of our Center for Data Analysis, and Dr. David Kreutzer of our Center for Free Markets.

JULY 8

Washington and Seoul announce agreement to deploy the Terminal High Altitude Area Defense (THAAD) in South Korea—a move long advocated by Bruce Klingner to counter the growing threat of North Korean missiles. The announcement comes just one day after the Treasury Department blacklisted North Korean leader Kim Jong Un for human rights abuses—another Heritage-recommended action.

JULY 12

Heritage releases its third annual *Index of Culture and Opportunity*. An invaluable resource for pinpointing obstacles that make it hard for individuals and communities to thrive, the *Index* tracks 31 indicators of U.S. cultural and economic wellbeing, complete with charts and commentary by top experts in and outside of Heritage.

Scenes from the launch of Heritage’s 2016 *Index of Culture and Opportunity*. TOP LEFT: Author, philosopher, and theologian Michael Novak. TOP RIGHT: Institute for Family Studies Research Fellow David Lapp and Heritage Policy Analyst Christine Kim. BOTTOM, FROM LEFT TO RIGHT: Heritage’s A. Anderlik Fellow Jennifer Marshall, Foundation for Government Accountability President and CEO Tarren Bragdon, Philanthropy Roundtable Director of Economic Opportunity Programs Jo Kwong, Maine Commissioner of Health and Human Services Mary C. Mayhew, and Heritage Senior Research Fellow Robert Rector.



JULY 12

Our Policy Services and Outreach team wraps up the inaugural year of the Feulner-Weyrich Fellowship Program. Fifteen House and Senate staffers graduate as Fellows, armed with a sound understanding of House and Senate procedures that can be critical to advancing good legislation.

JULY 12

In Allison Auditorium, Sens. Mike Lee (R-Utah) and Ben Sasse (R-Neb.) unveil the Alternatives to Licensing that Lower Obstacles to Work Act. The Senators chose Heritage because of our long crusade—led by the Legal Center’s Paul Larkin and the Center for Data Analysis’ Salim Furth—against excessive occupational licensing. The ALLOW Act would block the District government from erecting “excessive and arbitrary” barriers to self-employment—such as requiring a \$1,200 “sidewalk permit” to shine shoes outdoors. The bill serves as a model for state and local lawmakers looking to reform their occupational licensing laws.

LEFT: Senior Legal Research Fellow Paul Larkin. RIGHT: Sen. Mike Lee, (R-Utah).



JULY 14



Heritage publishes *Blueprint for Reform: A Comprehensive Policy Agenda*. Timed to have maximum impact on the presidential candidates’ transition teams, the 152-page document lays out the steps necessary to strengthen national security and empower Americans to build a more prosperous, healthier society.

Prepared by more than two dozen Heritage scholars, *Blueprint for Reform* presents programmatic and economic reforms in such detail that its recommendations could serve as the next President’s first budget. Think Tank Watch titles its report on the book: “Has Heritage Just Released Donald Trump’s Bible?”

JULY 14

Rep. Pete Olson (R-Texas) introduces the Civil Rights Uniformity Act of 2016. Based on the policy recommendations of our DeVos Center for Religion and Civil Society, the bill would make clear that all federal laws referring to a person’s sex cannot be interpreted by any federal agency to mean “gender identity” without explicit congressional authorization. It would undo the Obama administration’s unlawful rewriting of anti-discrimination law.

JULY 19

The Republican Party publishes its national platform. It includes all 12 “must-have” policy priorities formulated by Jim DeMint and other leaders of the Conservative Action Project. Among these priorities: appointment of constitutionalist judges, immediate repeal of Obamacare, and decentralization of education policy. It is derided by liberals and praised by the grassroots as the most conservative platform in modern GOP history.

JULY 29

Senior Fellow Dr. Robert E. Moffit publishes “Medicare’s Next 50 Years: Preserving the Program for Future Retirees.” The Special Report defines reforms needed to make the program fiscally sustainable while improving health care for the elderly and disabled.

AUGUST 5

Pulitzer Prize-winning cartoonist Michael Ramirez joins *The Daily Signal* as a weekly contributor. Later in the month, Visiting Fellow Beverly Hallberg debuts “Coffee Talk,” a *Daily Signal* column offering conservatives advice on the most persuasive ways to discuss current events and policy issues.

AUGUST 10

California State Sen. Ricardo Lara says he will remove provisions of his own bill that threatened the right of religious colleges to operate according to their principles if those conflicted with the state’s policies on sexual orientation and gender identity. *The Daily Signal* had written and editorialized about the bill for two months, and three Heritage scholars signed an open statement, released Aug. 9, decrying the assault on religious freedom.

AUGUST 15

Heritage names retired Army Lt. Gen. Thomas W. Spoehr as Director of our Center for National Defense. An exemplary leader, Spoehr draws upon his 36-year military career, which included command assignments and Army directorships in disciplines such as business transformation and program analysis and evaluation.

AUGUST 15

Senior Policy Analyst Rachel Greszler publishes “Why a Coal Miner Pension Bailout Could Open the Door to a \$600 Billion Pension Bailout for All Private Unions,” one of three backgrounders explaining the perils latent in the Miners’ Protection Act. Under heavy union pressure, the Senate Finance Committee approved the bill on Nov. 16. But Greszler, virtually the sole voice speaking in opposition, kept up a drumbeat of criticism. Ultimately, the Senate dropped it from the year-end spending package.

AUGUST 22

Senior Research Fellow Robert Rector marks the 20th anniversary of the landmark 1996 welfare reforms by leading a panel discussion on the state of welfare today. Rector notes that, two decades and \$24 trillion later, millions remain trapped in dependency on government—even though we now spend about four times the amount needed to pull every poor family out of poverty.



AUGUST 31

Syndicated columnist George Will hails Legal Research Fellow Paul Larkin’s congressional testimony exposing the Justice Department’s “bank settlement slush fund.” Justice had fallen into the unconstitutional—and highly politicized—practice of extorting multi-billion-dollar settlements from banks and then allowing them to meet some of those obligations by sending “donations” to liberal advocacy groups.

SEPTEMBER 1

Time magazine reports that more than 200 members of Congress follow Heritage's Twitter account. An analysis by Quorum Analytics ranked Heritage among the top two "outside groups with the most influence in Congress on Twitter."

SEPTEMBER 8

The House passes the Accelerating Access to Capital Act of 2016 (H.R.2357). Designed to help smaller businesses get the capital they need to expand, hire and grow the economy, the proposal was heavily influenced by Senior Fellow David Burton's research and counsel.

SEPTEMBER 8

Senior Research Fellow Dr. David Kreutzer testifies on the importance of U.S. energy exports before the House Committee on Foreign Affairs.

SEPTEMBER 9

House Financial Services Chairman Jeb Hensarling (R-Texas) introduces H.R.5983, the Financial CHOICE Act, which incorporates many of the reforms recommended in *The Case Against Dodd-Frank*. Hensarling also asks the editor, Senior Research Fellow Dr. Norbert Michel, to testify before the committee about the need for reforms.

SEPTEMBER 9

Sen. John McCain (R-Ariz.) delivers the annual B.C. Lee Lecture on "The Need for Renewed American Leadership in the Asia-Pacific."

LEFT TO RIGHT: Sen. John McCain (R-Ariz.), Heritage's Deputy Chief of Staff Anthony Kim, Asian Studies Center Director Walter Lohman, and South Korean Ambassador to the U.S. Ahn Ho-young in the Green Room moments before the B. C. Lee Lecture.



SEPTEMBER 10

Just days after Spain announces it will let a Syria-bound convoy of Russian warships refuel at its port in Ceuta, Allison Center Director Luke Coffey and Thatcher Center for Freedom Director Dr. Nile Gardiner publish "U.S. Should Condemn Spain's Military Support to the Russian Navy." Coffey's additional writings in European policy publications help create enough pressure that Spain's NATO allies publicly call for Madrid to reverse course. On Oct. 26, Russia announced its ships would not be docking at Ceuta after all.

SEPTEMBER 12

Heritage presents its Conservative Leadership Award to three courageous lawmakers: Rep. Mark Meadows (R-N.C.), Sen. Mike Lee (R-Utah), and Mississippi Gov. Phil Bryant.

LEFT TO RIGHT: Heritage Action CEO Mike Needham, Rep. Dave Bratt (R-Va.), Rep. Mark Meadows (R-N.C.), Mississippi Gov. Phil Bryant, Jim DeMint, Sen. Mike Lee (R-Utah), and Ed Feulner at Heritage Action's Conservative Leadership Awards in September.



SEPTEMBER 12

Day One for our class of 56 fall interns. A semester highlight for these young conservatives: hearing from—and having their portrait taken with—Supreme Court Justice Clarence Thomas.



SEPTEMBER 12

Our Meese Center for Legal and Judicial Studies kicks off its seventh annual Preserve the Constitution series of public events in which judges, scholars, lawyers, and political figures discuss the importance of respecting constitutional limits on government and restoring the courts to their proper constitutional role. The inaugural event features a panel discussion of how best to protect property rights. Subsequent sessions address challenges to First and Second Amendment rights, as well as a post-election analysis of “The Future of the Constitution in a New Administration.”

SEPTEMBER 13

Honoring our late Board Member, Heritage designates the offices housing our health and welfare policy teams as the Preston “Dick” Wells Domestic Policy Suite.

SEPTEMBER 14

Senior Research Fellow Bruce Klingner testifies on “North Korea’s Perpetual Provocations: Another Dangerous, Escalatory Nuclear Test” before the House Foreign Affairs Committee.

SEPTEMBER 15

Our Lectures and Seminars staff get a workout as they present three public seminars in one day: “U.S. Steel Market Needs Free Trade, Not Favoritism”; “What Would a No First Use Policy Mean for Global Security?”; and “What Happens When a Country Eliminates Its Agricultural Subsidies—The New Zealand Case Study.”

SEPTEMBER 21



Heritage publishes *Farms and Free Enterprise: A Blueprint for Agricultural Policy*—the fourth title in our Mandate for Leadership series. Edited by Research Fellow Daren Bakst, the book explains why—and how—Washington should free the nation’s farmers from debilitating regulation and dependency-inducing subsidies. *Politico* covers its release by noting: “Heritage won’t play defense during farm bill negotiations.”

The proposals in *Farms and Free Enterprise: A Blueprint for Agricultural Policy* generated much discussion in the ag community and on the Hill. Among the politicians requesting extra copies: Sens. Tom Cotton (R-Ark.) and Debbie Stabenow (D-Mich.), ranking member of the Senate Agriculture Committee.

SEPTEMBER 22

Romina Boccia, our Grover M. Hermann Research Fellow and Deputy Director of the Roe Institute, testifies on “Women in the 21st Century Workforce” before the House Republican Policy Committee Working Group.

SEPTEMBER 22

Senior Research Fellow Dean Cheng testifies on “Diplomacy and Security in the South China Sea: After the Tribunal” before the House Foreign Affairs Committee, Asia Subcommittee.

SEPTEMBER 23

Ginger Heckman, a manager at Atlanta-based Noble Properties Inc. (a commercial real estate development, investment, and management company), is elected to the Heritage Board of Trustees.



SEPTEMBER 24

Dr. Ted Bromund, Senior Research Fellow in Anglo-American Relations, receives the Second Amendment Foundation’s Global Leadership Award for his work on the U.N. Arms Trade Treaty.

SEPTEMBER 26

The U.S. Justice Department sanctions four Chinese nationals and a China-based company for assisting North Korea’s nuclear weapons and missile programs. Heritage has called for such action for years, including twice in congressional testimony delivered earlier in 2016.

SEPTEMBER 27

Research Fellow Dr. David Muhlhausen publishes “Evidence-based Fiscal Discipline: The Case for PART 2.0.” To help deal with the ballooning national debt, Muhlhausen argues for eliminating or at least radically reforming federal programs shown to be ineffective.

SEPTEMBER 27

Senior Research Fellow Dr. Norbert Michel testifies on brokered deposits and how they relate to FDIC insurance before the House Financial Services Committee, Financial Institutions Subcommittee.

SEPTEMBER 27

Senior Research Fellow Dean Cheng testifies on “Are We Losing the Space Race to China?” before the House Committee on Science, Space, and Technology.

SEPTEMBER 29

Our Congressional Fellowship program graduates 80 congressional staffers—the largest class ever. Now in its 15th year, this is Heritage’s premier educational program for Hill staff. The nine-month program provides junior congressional staff with weekly seminars covering First Principles and conservative policy-making.



SEPTEMBER 29

Senior Legal Fellow Hans von Spakovsky testifies on Justice Department misconduct before the House Judiciary Committee, Subcommittee on Regulatory Reform, Commercial and Antitrust Law.

OCTOBER 5

Our Meese Center concludes its eight-part *Preserve the Constitution* lecture series with “The Originalism Revolution Turns 30: Evaluating Its Impact and Future Influence on the Law,” featuring former U.S. Attorney General Ed Meese and U.S. Circuit Judge William Pryor.

OCTOBER 12–14

More than 50 Hill staffers participate in our Emerging Leaders Retreat in Bedford Springs, Pennsylvania. The three days of workshops and networking sessions are designed to help rising conservative stars work together on Capitol Hill.

OCTOBER 21

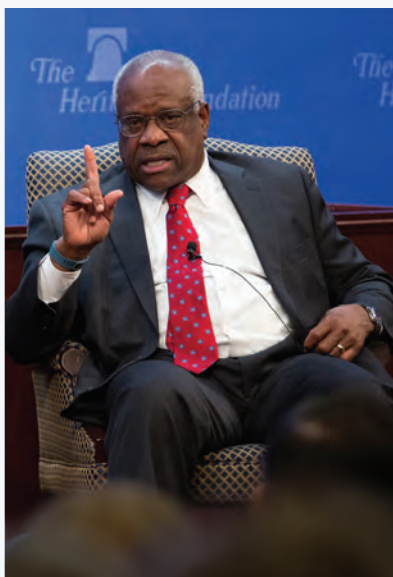
The Meese Center for Legal and Judicial Studies hosts “Reining in the Administrative State” at the University of Virginia School of Law. The all-day law symposium features over 20 top scholars and a keynote address by U.S. Circuit Judge J. Harvie Wilkinson. The speakers’ papers will be published in UVA’s *Journal of Law and Politics* in spring 2017.

OCTOBER 22

Presidential Candidate Donald Trump, campaigning in Gettysburg, Pennsylvania, unveils his “Contract with the American Voter.” It includes all 12 “must-have” policy priorities put forth by the Conservative Action Project.

OCTOBER 28

Supreme Court Justice Clarence Thomas delivers the annual Joseph Story Distinguished Lecture. More than 200 people—including more than 20 journalists—attend the event. C-SPAN covers it live, while NBC, ABC, and CNN run footage of his remarks later. Former Attorney General Edwin Meese III awards Thomas Heritage’s “Defender of the Constitution Award.”



NOVEMBER 1

Heritage releases *Blueprint for a New Administration: Priorities for the President*, the last installment of our 2016 Mandate for Leadership series. The 70-page report recommends specific actions the next president can take immediately to reform executive branch programs and policies. It also identifies steps that the top officers of all 15 Cabinet-level departments and six key executive agencies can take to strengthen free markets, national sovereignty and security, and America’s civil society.



NOVEMBER 1

Daily Signal Foreign Correspondent Nolan Peterson is profiled in *країна* magazine, Ukraine’s equivalent of *Time*. One of the few Western journalists reporting from the front lines in eastern Ukraine, Peterson later that month scores an exclusive interview with ex-Georgian President Mikheil Saakashvili.

NOVEMBER 3

Heritage’s voter fraud database is entered into the court record in a North Carolina dispute over allowing Republican poll watchers on Election Day. The database documents 755 criminal convictions for various types of voting fraud. In the weeks leading up to the election, Legal Fellow Hans von Spakovsky is interviewed more than 150 times regarding election integrity issues.

NOVEMBER 5

The Daily Caller profiles Dr. Lee Edwards, Heritage’s Distinguished Fellow in Conservative Thought. The article dubs him “the voice of the silent majority,” a man who “has lived conservative history like none other.”

NOVEMBER 14

One week after Donald Trump is elected on the promise of “draining the swamp,” *The Daily Signal* breaks depressing news: House Republicans are trying to revive earmarks. The story prompts several conservative groups to weigh in against the GOP proposal. *The Daily Signal* stays on top of the story for days, until lawmakers abandon the attempt.

NOVEMBER 14

Dean Cheng, a Senior Research Fellow in our Asian Studies Center, publishes *Cyber Dragon: Inside China’s Information Warfare and Cyber Operations*. (Praeger).



NOVEMBER 16

Heritage publishes the *2017 Index of U.S. Military Strength*. It rates three of the four military branches as only “marginally” able to prevail in a two-conflict scenario. The fourth branch—the Army—is classified as “weak.” Senate Armed Services Chairman John McCain (R-Ariz.) quickly affirms those conclusions, writing:

As the report warns, our military has been degraded by years of under-investment, poor execution of modernization programs and the negative effect of budget sequestration. The result is that our military confronts growing capacity, capability, and readiness challenges that put America’s national security at greater risk. We cannot change course soon enough.

U.S. Military Power

	VERY WEAK	WEAK	MARGINAL	STRONG	VERY STRONG
ARMY		✓			
NAVY			✓		
AIR FORCE			✓		
MARINE CORPS			✓		
NUCLEAR			✓		
OVERALL			✓		



NOVEMBER 17

The Clare Boothe Luce Policy Institute names Legal Fellow Elizabeth Slattery as one of 12 “Great American Conservative Women” for 2017.

NOVEMBER 17

Vice President Jennifer Marshall hosts Heritage’s annual Antipoverty Forum. Highlights included keynote remarks from Sen. James Lankford (R-Okla.), as well as observations from Rep. Mike Kelly (R-Pa.), and former Sen. Jim Talent (R-Mo.).

CLOCKWISE, FROM TOP LEFT: The 2016 Antipoverty Forum gets underway at Washington’s Union Station; Heritage Vice President Jennifer Marshall and Sen. Mike Lee (R-Utah) listen closely as Rep. Dave Brat (R-Va.) discusses the 1996 welfare reforms; Rep. Mike Kelly (R-Pa.) explores the nexus of religion and antipoverty efforts; Eloise Anderson, Wisconsin’s Secretary of the Department of Children and Families, and Robert Woodson Sr., Founder and President of the Center for Neighborhood Enterprise, discuss civil society and social unrest.



NOVEMBER 17

Dismayed by Hillary Clinton’s election loss, some on the Left demand abolition of the Electoral College. Heritage scholars counter with commentaries explaining the rationale for—and utility of—the institution. Meanwhile, Genevieve Wood’s interview with an Electoral College-supporting student becomes *The Daily Signal*’s most-watched video of the year, with 1.5 million views.

NOVEMBER 17–18

Heritage hosts an orientation program for newly elected members of Congress. The program focuses on the procedures and practical skills needed to implement conservative policy in Congress.

NOVEMBER 21

Our health care team publishes “Preparing a Smooth Transition for the Repeal of Obamacare.” The paper calls for immediate repeal of Obamacare and outlines a series of “aggressive administrative actions to stabilize the private health insurance market” as health reforms are readied to take effect.

NOVEMBER 23

South Korea and Japan sign a joint military intelligence-sharing agreement long advocated by Senior Research Fellow Bruce Klingner. The cooperation pact will strengthen the deterrence and defense capabilities needed to counter North Korea's nuclear and missile threats.

NOVEMBER 26

Fidel Castro dies. Memorialized by The New York Times as "a towering international figure," Heritage Policy Analyst Ana Quintana assesses his regime differently. On the PBS NewsHour, she describes Castro's legacy as "one of tyranny ... one of tens of thousands of people being murdered, and ... 2 million people who have been displaced and lost their country."

DECEMBER 2-3

Heritage hosts its first-ever policy retreat for members of the House Freedom Caucus. Nine members of the Caucus Steering Committee travel to Charlottesville, Virginia, to gameplay legislative strategies that can assure enactment of conservative policies—a real possibility with a new Congress and President Trump.

DECEMBER 5-6

More than 800 members attend Heritage's annual President's Club meeting in Washington, D.C. One highlight among many: a keynote address by Vice President-elect Mike Pence. Additionally, member recognition awards are presented to John Lehman of Naples, Florida, (the Coors, Noble, Scaife Founders Award) and Karen Wright of Mount Vernon, Ohio (the George Washington "Generation's Yet Unborn" Award).

Scenes from President's Club... **TOP LEFT:** Ed Meese, Trustee Kay Coles James, and Ed Feulner discuss Heritage's policy priorities for 2017. **TOP RIGHT:** Rep. Mick Mulvaney (R-S.C.) joins in a panel discussion of "Disrupting Washington from the Inside and Outside." **BOTTOM LEFT:** Helena Richardson, Director of our Young Leaders Program, outlines new initiatives to develop our country's next generation of conservative leaders. **BOTTOM RIGHT:** Vice President-elect Mike Pence keynotes the Dec. 6 dinner program.



WILLIS BRETZ

DECEMBER 5

British Member of the European Parliament and leading Brexit campaigner Daniel Hannan delivers the sixth annual Jesse Helms Lecture. The lecture series highlights foreign policies—such as strengthening the U.S.-U.K. “special relationship”—long championed by the late senator.



DECEMBER 8

U.S. Sen. Tom Cotton (R-Ark.) receives Heritage’s first “Robin and Jocelyn Martin Young Leaders Program Distinguished Alumni Award,” honoring former interns who have achieved great things.

DECEMBER 8

Rep. Sam Johnson (R-Texas) introduces the Social Security Reform Act of 2016. Profoundly influenced by the work of Romina Boccia, our Grover M. Hermann Research Fellow, the proposal would overhaul the troubled Old Age, Survivors and Disability Insurance program.

DECEMBER 13

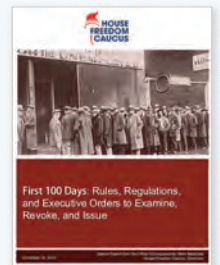
Northwestern University’s Gary Saul Morson delivers the second Russell Kirk lecture of 2016: “What Russian Literature Can Teach Conservatives.”

DECEMBER 14

Rep. Mark Meadows (R-N.C.), Chairman of the House Freedom Caucus, releases a list of more than 200 rules the incoming Trump administration should revise or repeal. *USA Today* later notes that “the report took many of its explanations about the impacts of targeted rules word-for-word from Heritage Foundation publications.”

It is not all that surprising that the Heritage Foundation would be the source of a lot of the ideas on the deregulation target list, given that members of the Freedom Caucus have participated in monthly lunches with reporters hosted and moderated by the Heritage Foundation.

—USA TODAY, DEC. 20, 2016



DECEMBER 16

The SEC Small Business Advocate Act is signed into law, much to the delight of Senior Fellow David Burton, a fierce advocate of improving the regulatory environment for entrepreneurs trying to raise capital. The new law establishes an office to assist small-business owners in their dealings with the Securities and Exchange Commission and to ensure that agency regulations avoid imposing undue hardships small firms.

DECEMBER 16

Senior Research Fellow James Gattuso and Research Fellow Daren Bakst publish “Stars Align for the Congressional Review Act,” highlighting a long-neglected 1996 law allowing Congress to overturn regulations that go too far. The law had been used only once, to quash an OSHA ergonomics rule in 2001. But our analysts urge lawmakers to dust off the red-tape-busting tool and exercise much-needed regulatory oversight.

NOTE: Congress responded well. In its first month in session, lawmakers passed resolutions disapproving three Obama-era regulations and had two dozen more in the pipeline.

DECEMBER 16

Graduates celebrate their successful completion of Heritage’s Principles of Leadership program. Now in its fourth year, the program selects Heritage staff members who have demonstrated exceptional aptitude for leadership, and puts them through a four-month training regimen. The program combines classroom instruction with two group projects that allow them to apply the precepts of leadership they’ve learned.



DECEMBER 22

Senior Research Fellow Robert Rector and Senior Policy Analyst Jamie Bryan Hall publish “National Academy of Sciences Report Indicates Amnesty for Unlawful Immigrants Would Cost Trillions of Dollars.” The study calculates how much illegal aliens now in the country would collect in entitlements and welfare benefits if they were granted amnesty or “earned citizenship.”

DECEMBER 23

President Obama signs the 2017 National Defense Authorization Act. In keeping with Heritage recommendations, the law eschews the president’s request for additional troop reductions in the active Army and Marine Corps and makes more money available to help the services deal with growing readiness problems. 🇺🇸



Class of '16 Spring Interns

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Jessica McBirney, *Biola University*

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DUNLOP JOINS RANKS OF HERITAGE DISTINGUISHED FELLOWS



BECKY NORTON DUNLOP
*Ronald Reagan Distinguished Fellow
in Policy Promotion*

Heritage bestows the title of Distinguished Fellow on a select few. The designation recognizes individuals who, in addition to their dedication to rigorous research and conservative principles, boast a record of experience and outstanding achievement compiled outside the think tank world.

On May 18, Becky Norton Dunlop became our newest Distinguished Fellow: The Ronald Reagan Distinguished Fellow in Policy Promotion. It is a fitting title. She served President Reagan in a variety of senior posts throughout his administration.

And 2016 must have seemed like old times to Dunlop. Having helped run the presidential personnel office in the Gipper's first term, she spent most of 2016 heading up our Restore America Project, recruiting conservatives to serve in key positions in the new administration.

Dunlop has been a key leader and strategist in the conservative movement for decades. She served as Heritage's Vice President for External Relations for nearly 20 years. She also chairs the Conservative Action Project, an alliance of more than 100 CEOs working together to advance conservative principles and policies.

She joins these other Distinguished Fellows:



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*Distinguished Fellow
in Conservative Thought*



KIM R. HOLMES, PH.D.
Distinguished Fellow



EDWIN MEESE III
*Ronald Reagan Distinguished
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PEOPLE ARE POLICY

2016 NAMED FELLOWS

Heritage is home to some of America's most thoughtful—and creative—policy analysts. And we have been blessed with donors who are committed to making sure that we can

continue to attract and retain top-flight scholars and to train up the next generation of conservative leaders. In 2016, we added four named fellowships and welcomed 70 named interns.



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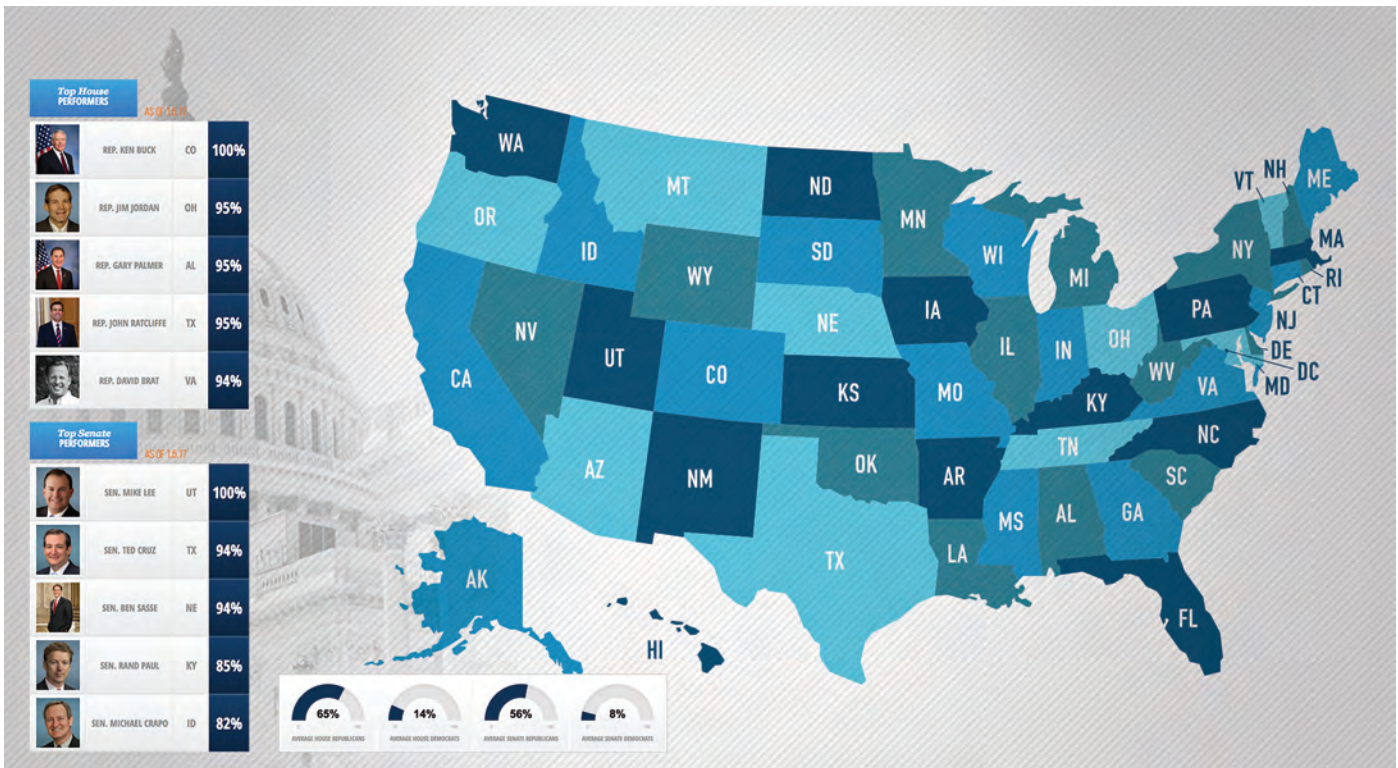


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**new fellowship in 2016*



The Heritage Action scorecard grades lawmakers according to their votes, not their rhetoric.

HERITAGE ACTION FOR AMERICA

KEEPING CONGRESS ACCOUNTABLE

Consequential conservative policy victories don’t just happen—not even in a favorable political environment. In the deeply divisive and partisan era of Barack Obama, it’s been heavy going indeed.

But times have changed. The incredible opportunities now before our country exist both because the American people rose up in defiance of the political establishment, cultural elites and media pundits, and because Heritage Action has spent years laying the groundwork for legislative success.

OBAMACARE ON THE ROPES

For six years, Republican politicians campaigned against Obamacare and cast dozen of votes to demonstrate their collective commitment to repeal. That did not happen through inertia—it required a constant conservative conscience demanding principled action. As described in a *New York Times Magazine* cover story, “A few days before the retreat, I met up with the man who, perhaps more than any other figure in the conservative movement, had maneuvered the party toward complete and unbending opposition to Obamacare: Michael Needham ... the chief executive of Heritage Action for America.”

The magazine piece documented Heritage Action’s role, starting in 2010, in keeping Obamacare repeal at the forefront of the Republican agenda. Though it received little attention in the cover story, one of the most consequential legislative efforts culminated in then-President Barack Obama’s 2016 veto of a bill that would have repealed nearly every vital organ of Obamacare. The *New York Times Magazine* piece captured the importance of that vote and all subsequent votes:

[T]o Heritage Action, they served a purpose: in the organization’s parlance, to “lock in” members, to “orient” the Republican Party to conservative principles so that it would “do the right thing.”

When Heritage Action began pushing the reconciliation strategy aggressively in 2015, it explained that “no alternative strategy is likely to bring about repeal early in 2017.” It was true then and remains true today. And through the efforts of Heritage Action, our Sentinels and conservative allies on Capitol Hill, there was a mandate to repeal Obamacare.



LEFT: Neil Gorsuch, newest member of the Supreme Court.



RIGHT: Rep. Joni Ernst (R-Iowa) addresses Heritage Action's Conservative Policy Summit in February.

A CONSERVATIVE JUSTICE

The sudden death of Justice Antonin Scalia handed then-President Obama and the political left the opportunity to reshape our nation's legal norms for a generation to come. Even the *New York Times* understood the significance of the moment, declaring that Senate approval of Mr. Obama's nominee would "result in a historic change in the court" and make "the court more liberal than at any point in nearly 50 years."

We know how the Merrick Garland nomination ended. But Heritage Action started crafting the storyline even before Justice Scalia's untimely death.

As the *Washington Post* reported on March 11, 2016, "At the beginning of this year, ... [Heritage Action] began laying the groundwork for the current battle. Its leaders met with a number of senators ... urging them to block the confirmation of several Obama appointees to the federal courts who were later confirmed." Part of the reason we were so active early on was our concern that, if a death or retirement did leave a vacancy on the court, Senate conservatives would need to be prepared for—and unshakable in their opposition to—an attempt to put another activist in position to "reinterpret" the Constitution.

Our activism did not go unnoticed. Now-retired Senate Minority Leader Harry Reid took to the Senate floor to condemn our efforts: "Powerful right-wing groups announced

they're scoring votes on presidential nominations," he said. "Heritage Action ... said the Senate should only confirm nominees they deem—they deem, not the senators, but this right-wing cabal—that they deem worthwhile."

Our efforts, along with those of Senate Republicans, prevailed. That gave the new president the opportunity to nominate Judge Neil Gorsuch. And so, today, a jurist 'very much in the mold' of the late Justice Antonin Scalia sits on the highest court in the land.

A GROWING GRASSROOTS ARMY

In 2016, Heritage Action set an ambitious goal: to recruit 40,000 Sentinels by 2020. What's a Heritage Action Sentinel? A super activist; a community leader with deep policy knowledge, a wide range of influential relationships, and a keen interest in advancing conservative policy at the federal level.

We wound up blowing past our recruitment goal for 2016, ending the year with more than 18,000 Sentinels. But this story is not so much one of numbers as it is one of individuals, patriots dedicated to our shared conservative principles.

Knowing Your Member. Personal relations are critically important in politics, and Sentinels who know their Members of Congress can take activism to the next level. Joe in Texas

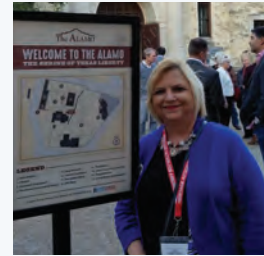
SUPREME COURT OF THE UNITED STATES/STEPHEN PORCELL

SENTINEL IN THE SPOTLIGHT

Vicki Sciolaro

VICKI SCIOLARO of Leawood, Kansas, knew about Heritage Action's Sentinel program, but she didn't know the impact she could have as a Sentinel until she sat down with Heritage Action's regional coordinator Rebekah Warwick in 2016.

Vicki and Rebekah quickly developed a relationship built on trust, mutual respect, and shared aspiration. And that's exactly the type of relationship that makes Heritage Action's Sentinel program uniquely impactful and rewarding.



After Justice Scalia's sudden death, most Senate Republicans took an appropriately hard line against any Obama nominee: no hearings, no votes. But when Kansas Republican Sen. Jerry Moran suggested a hearing would be possible, Vicki jumped to action. Using her growing network and deep relationships, Vicki encouraged Sen. Moran to hold the line against hearings and let him know that she and other conservatives supported that effort. A few days later, the senator made clear he did not favor any hearings for Obama's nominee.

Heritage Action Sentinels play many roles. Accountability is crucial, but so too is the ability to be a reassuring and supportive voice when a lawmaker needs encouragement to do the right thing. Vicki and her fellow Sentinels all across the country are ready!

SENTINEL MISSION:

*Know the Issues,
Grow your Skills,
and Go out and Lead*

already had a personal relationship with his Representative before joining the Sentinel program in 2016, but he took that relationship to the next level by pushing for swift repeal of Obamacare, and recruiting his friends and neighbors to deliver the same message.

Utilizing Your Network. Sometimes the best way to influence a Member of Congress is to influence his or her personal network. Randy in South Carolina took that approach after joining the Sentinel program in 2016. In addition to talking to Members of Congress in the state about important religious liberty legislation, Randy recruited a well-respected community leader to echo his comments. That one-two punch of local, informed, and respected constituents is indispensable.

Heritage Action's Sentinels have done the hard work of holding lawmakers accountable, and now they are in a strong position to help advance conservative policy that can actually be signed into law by the President. Their work is indispensable to Heritage Action's inside-outside approach to congressional lobbying. And as the program grows, so too will their impact.

MOVING FORWARD

In 2011, Heritage Action warned: "There is a great awakening of sorts that is sweeping the nation right now." At the time, there was very little concern in Washington that, as we put it, "our current political system is one that favors the powerful at the expense of those striving to build toward the American dream."

The political elites were never able to understand this dissatisfaction, much less do anything to improve matters. Their inaction created the conditions by which Donald J. Trump could become President of the United States.

To paraphrase The Heritage Foundation's Ed Feulner, our movement and our country grow stronger through addition and multiplication, not subtraction and division. Heritage Action will not allow inertia and Washington's preconceived notions to divide the newly emboldened political coalition. Few organizations understand the political moment better than Heritage Action and no organization is better placed—at the intersection of policy, politics, and process—to make America great again. 🇺🇸

VICKI SCIOLARO



Vice President-elect Mike Pence addresses Heritage members at the December 2016 President's Club meeting.

DREAMING THE IMPOSSIBLE... AND MAKING IT HAPPEN

Did you ever think that we'd be where we are today, on the verge of achieving conservative policy victories like cutting excess regulations, rebuilding the military, and making real cuts in federal spending?

Actually, you probably did. You're a Heritage member, and Heritage members aren't fooled by Washington's so-called "art of the possible" mentality. Heritage members have consistently rejected the conventional wisdom that you should never pursue goals that actually shake things up in Washington.

You, as a Heritage member, never stopped dreaming—and demanding—what the pundits, elites, and establishment all said were impossible. You joined us in a visionary fight to reclaim America.

In 2016, you showed your resolve by contributing more than \$119 million in gifts, pledges, and estate commitments to The Heritage Foundation and Heritage Action for America. That brings us within \$163 million of reaching the ambitious goal of our Reclaim America Campaign: raising \$750 million in just six years (2013-2018).

Your support helped us to expose Washington's go-along to get-along culture, keep the urgency of repealing Obamacare front and center, and—by enabling Heritage's work on the presidential transition team—put a new administration in position to rebuild the military, rein in the regulatory state, protect religious freedom, expand education choice, and do much, much more.

In 2016, it was our great pleasure to single out a few of our members for public recognition of their amazing generosity and sustained support for our shared vision of building an America where freedom, opportunity, prosperity and civil society can flourish, to the benefit of all.

You will read some of their stories in the following pages. But there are literally hundreds of thousands more stories—all of them inspiring—to be found among our members. Their love of country, their belief in the American Dream, and their faith in Heritage inspire us every day.

We know they will continue to dream big and to help us throughout 2017 as we lead the way to a resurgence of America. 🇺🇸



Heritage members unwind at the 2016 Annual Leadership Conference

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TOP LEFT: Billi Jean Murphree accepts the "George Washington Generations Yet Unborn Award" on behalf of her late husband at the 2016 Annual Leadership Conference. TOP RIGHT: Ed Feulner (center) chats with Heritage Legacy Society and President's Club members James and Melisha McAlister at the Annual Leadership Conference. MIDDLE LEFT: Jim DeMint presents President's Club member John Lehman with the Coors, Noble, Scaife Founders Award at the December President's Club Meeting. MIDDLE RIGHT: Associate Carly Fiorina (left) speaks with Heritage Legacy Society and President's Club members Gene D'Agostino and his wife, Janet Zimmerman, at the Annual Leadership Conference. BOTTOM LEFT: Founder Mark Kolokotronis at the 2016 President's Club Meeting in December. BOTTOM RIGHT: President's Club members John and Christine Lehman (far right and far left) visit with Founder Fran Keegan (center left) and her guest James Burke (center right) in Naples.



ANNUAL LEADERSHIP CONFERENCE. JEFF WESCOTT: PRESIDENT'S CLUB; NAPLES RECEPTION; MICHELLE MCMINN

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 Mr. and Mrs. Ronald Trzcinski
 Mr. and Mrs. Wallace E. Volwiler
 Mr. Donald A. Wachter
 Mr. and Mrs. Douglas O. Waikart
 The Walker Foundation
 Mr. and Mrs. Dale M. Walsh
 Mr. and Mrs. William L. Walton
 The Weiler Foundation
 Mr. Stephen D. Weiss
 Marion G. Wells Foundation
 Mr. and Mrs. Stephen West
 Mr. Robert K. Zelle

ASSOCIATES

Mr. and Mrs. David J. Adams
 Alkin Co.
 Mr. and Mrs. Robert A. Anderson
 Mrs. Faye B. Andrews
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 Mr. and Mrs. George T. Beck
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 Mr. and Mrs. T. F. Beresford
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 The Bevenity Community Impact Fund
 Mr. and Mrs. Lawrence J. Blanford
 Mr. and Mrs. Kipton Blue
 Mr. and Mrs. Drew Boersma
 Mr. Stephen W. Boesel
 Mr. and Mrs. Richard L. Boos
 Mr. and Mrs. David Borgen
 Mr. and Mrs. Norm H. Bouton, Jr.
 Mr. Bruce E. Bowen and Ms. Vicki Davis
 Mr. and Mrs. Richard W. Boyce
 Mr. Michael B. Boylan
 Mr. and Mrs. Bayard Boyle Jr.
 Brady Family Trust
 Mr. Tarren Bragdon
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 Mr. William R. Broadbent
 Dr. and Mrs. Bart J. Broadman
 Mr. and Mrs. Craig R. Brown
 Mr. and Mrs. John R. Brown
 Mr. and Mrs. Richard N. Brown
 Mr. and Mrs. Robert H. Bruce
 Mr. and Mrs. David Burckel
 Mrs. Betsy Burgett
 Ms. Pamela Burke
 Mr. and Mrs. Robert D. Burroughs
 The Mary H. Cain Foundation
 Mr. Ronald M. Cameron
 Mr. and Mrs. Donald Carter
 Mr. and Mrs. Ronald L. Carter
 Mr. Richard Castiglia
 Mrs. Susan C. Castleberry
 Mr. and Mrs. Bill Chapin
 The Chisholm Foundation
 Mr. and Mrs. Donald L. Clark
 Mr. and Mrs. John B. Clough
 Mr. James K. Cluverius
 Miss Susan D. Conger
 Mr. William O. Cooley
 Ms. Darden K. Coors
 Mr. and Mrs. Robert P. Cornell



LEFT: Associate Carol Manning at the Naples dinner in February.



RIGHT: Heritage Trustee Ryan Haggerty visits with members at the December President's Club Meeting.

- Mr. Christopher B. Cowie
- Mr. and Mrs. Gerald W. Dahlander
- Dr. Tony Dale
- Mr. and Mrs. Jason Damron
- Mrs. Jean L. Davenport
- Mr. and Mrs. Charles Davis
- Mr. Ken W. Davis, Jr.
- Mr. Frank A. De Ganahl
- Mr. Russell M. Dembeck
- Mr. and Mrs. Jim W. DeMint
- Mr. and Mrs. Robert G. Dettmer
- Mrs. George T. Devries
- Mr. and Mrs. Cortlandt S. Dietler
- Mr. Luther L. Dintiman
- Mr. and Mrs. Robert W. Drinkward
- Mr. Chris C. Dugle
- Mr. Duane Dunker
- William J. and Julia M. Edwards Foundation
- Mr. and Mrs. James W. Eggers
- Mr. David B. Elliott
- Mr. Robert W. Ellis
- Erickson Family Charitable Foundation
- Mr. and Mrs. Gerald Erwin
- Express Employees Professionals
- Ms. Joan H. Facey
- Fairchild-Martindale Foundation
- Mr. and Mrs. Todd S. Farha
- Mr. A. D. Ferris
- The Lundy Fetterman Family Foundation
- Mr. Hubert B. Finch
- Dr. and Mrs. Michael Fleming
- Mr. and Mrs. John C. Foxley
- The Alta and John Franks Foundation
- Mr. Stanley E. Fulton
- Mr. Edward Gannon
- Mr. Dudley Garner
- Mr. Bob W. Garthwait, Jr.
- Mr. Roger B. Gatewood
- Mr. and Mrs. J. P. Gavaghan
- Rollin M. Gerstacker Foundation
- Mr. and Mrs. Ed W. Gilbertson
- Mr. Donald Gobel
- Mr. and Mrs. Earl Godwin
- Mr. and Mrs. Bobby Gorski
- Mr. and Mrs. Richard J. Grant
- Mrs. Marian F. Grebasch
- The Albert M. and Lyda M. Green Foundation
- Mr. and Mrs. Jerome Green
- Mr. Michael H. Guetz
- Mr. Daniel L. Guild
- Mrs. Jan Hair
- Mr. and Mrs. John Hajjar
- Jaqueline and Willis Hamilton Foundation
- Mr. and Mrs. Allen R. Hartman
- Mr. and Mrs. J. Wayne Hamman
- Mr. and Mrs. Glenn W. Hasse, Jr.
- Ms. Reta K. Haynes
- Mr. and Mrs. Ron J. Hazlett
- Mr. and Mrs. John W. Hedberg
- The Herbold Foundation
- Mr. and Mrs. Tatnall L. Hillman
- Mr. George C. Hixon
- Frank Holder
- Mr. and Mrs. Edson P. Holland
- Mr. and Mrs. Lawrence P. Holleran
- Mrs. Margaret M. Holmes
- Mr. and Mrs. James Holten
- Mr. Herbert Hostetler
- Mrs. Nadine C. Houston
- Mr. and Mrs. Randall K. Hunter

- The Huston Foundation
- Mr. and Mrs. Joseph M. Iacovetta
- Mr. and Mrs. Ralph E. Janes III
- Mr. and Mrs. David M. Jellison
- Mrs. Doris D. Jerman
- Mr. and Mrs. Charles B. Johnson
- Mr. G. Lenard Johnston
- Mrs. Joanne T. Johnson
- Mr. and Mrs. William Johnson
- Mr. Charles R. Jones
- Mr. Raymond B. Jones, Sr.
- Mr. and Mrs. Richard Jones
- Ms. Rebecca L. Julian
- Lidia Jurkiw-Gulawsky
- Mr. and Mrs. Paul Kalmbach
- Mr. Harry P. Keegan IV
- Mr. and Mrs. Thomas L. Kempner
- Mr. and Mrs. C. Bruce Kern

MEMBERSHIP LEVELS

Heritage welcomed more than **65,000** new members in 2016. Our range of membership levels and benefits can accommodate all.

LEVEL	STARTING AT
<i>Basic</i>	\$25
<i>Patriots Club</i>	\$100
<i>Young President's Club</i>	\$250
<i>President's Club</i>	\$1,000
<i>Executive Committee</i>	\$2,500
<i>Premier President's Club</i>	\$5,000
<i>Associate</i>	\$10,000
<i>Executive Associate</i>	\$25,000
<i>Premier Associate</i>	\$50,000
<i>Founder</i>	\$100,000
<i>Trustees' Circle</i>	\$500,000
<i>Chairman's Circle</i>	\$1,000,000

For details on the benefits attached to each level, please call **(800) 546-2843** or visit **MyHeritage.org**.



TOP LEFT: Executive Associate and Heritage Legacy Society member Darryle Owens meets with football legend Lou Holtz at Heritage's reception honoring Reclaim America Campaign Leaders. **TOP CENTER:** Vice President-elect Mike Pence with Chairman's Circle and Heritage Legacy Society member Barbara Rumpel at the December President's Club Meeting. **TOP RIGHT:** Heritage Trustee Barb Van Andel-Gaby, Vice Chairman of the Board, welcomes members to the 2016 President's Club Meeting. **MIDDLE:** Jim Ulmer (left), Walter Bell, and Ellen McPherson—all representing the Lillian S. Wells Foundation, a Trustee's Circle Organization—join Ed Feulner (right) for the September ribbon-cutting ceremony that opened the Preston "Dick" Wells Domestic Policy Suite. **BOTTOM LEFT:** Heritage Legacy Society and President's Club member Christine Pettingill at the December President's Club Meeting. **BOTTOM RIGHT:** On behalf of their parents, Founder members Richard and Mary Beth Weiss, Braden Weiss and Kimberley Hosking cut the ribbon for the Jack and Nancy Weiss Family Terrace.



JEFF WESCOT/WILLIS BRETZ/PAUL MOISE

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 Mr. Donald H. Kirkland
 Kita Hahn Kook Center USA
 Mr. and Mrs. True H. Knowles
 Mr. and Mrs. Vincent A. Kolber
 Mr. Andrew Komarek
 Mr. Richard A. Kreitzberg
 Vernon Kriebel Foundation
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 Mr. Thomas D. Lasersohn
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 Mr. Robert A. LeCompte
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 Mr. and Mrs. Harold Levy
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 Mrs. Maxine V. Loper
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 Mr. Richard E. Lunquist
 Walter Lutz
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 Mrs. Natalie Meckle
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 Mr. and Mrs. Reed W. Mower
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 The Ted Muhs Foundation
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 Charitable Trust
 The Negaunee Foundation
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 William Penn Foundation
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 Mr. Kort J. Peters, Jr.
 Lovett & Ruth Peters Foundation
 Mr. and Mrs. Guido M. Pichini
 Ms. Jayne H. Plank
 John William Pope Foundation
 Mr. and Mrs. Allen B. Porter
 Mr. and Mrs. Michael Povinelli
 Ms. Beth Powers
 Mr. William Purves
 Mr. and Mrs. John H. Quinn, Jr.
 Mr. and Mrs. Gary Rabine
 Mrs. Mary Raymond
 Mr. Stephen Read
 Dr. and Mr. Michael E. Reif
 Ms. Lola Reinsch and
 Mr. J. Almont Pierce
 Mr. and Mrs. Charles D. Reite
 Mrs. Lisenne Rockefeller
 Mr. and Mrs. Rick J. Rodell
 Mr. and Mrs. Roger D. Roehl
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 Mr. and Mrs. Anthony J. Saliba, Sr.
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 Mr. Thomas Sayer
 Mrs. Kedren Scales
 Mr. and Mrs. Donald Scifres
 Mr. Charles D. Sears
 Mrs. Lola Shearer
 Mr. Mark Shevitz
 Mr. and Mrs. Barry R. Shreiar
 Louis and Nellie Sieg Fund
 Mr. and Mrs. Harold Siegel
 Mr. Abe Siemens
 Mr. and Mrs. Forrest W. Simmons
 Mr. and Mrs. Murray S. Simpson, Jr.
 Mr. Willis B. Skillman

Mr. David Smith
 The Snider Foundation
 Mrs. Shirley M. Sontheimer
 Mr. and Mrs. Craig and Betty Staley
 Mr. William C. Steen
 Mr. and Mrs. Robert Stichweh
 Mrs. Marilyn Stiglitz
 Stiles-Nicholson Foundation
 Mrs. Diane J. Stites
 Mr. and Mrs. Roger W. Stone
 Mrs. Ruth M. Stone
 Ms. Mary E. Stratton
 Suntrust Foundation
 Mr. and Mrs. Kermit S. Sutton
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 Mr. and Mrs. Gary L. Swenson
 The Sidney A. Swensrud Foundation
 Mr. and Mrs. Chris J. Taylor
 Mr. Herbert H. Thiele
 Mr. Arthur Thompson
 Dr. Donald Thompson
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 Tippins Foundation
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 Mr. and Mrs. Ron Tucker
 Mr. J. R. Tullis
 Mr. and Mrs. Donald F. Turano
 Mr. Michael S. Turner
 Ed Uihlein Family Foundation
 The Steve & Amy Van Andel
 Foundation
 Mr. James R. Voss
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 Mr. Charles R. Watkins, Jr.
 Katharine Audrey Webb Foundation
 Mr. and Mrs. Ronald B. Weinell
 Mr. and Mrs. Duane M. Weise
 Mr. Ernie R. West
 Samuel L. Westerman Foundation
 Westmeath Foundation
 Mr. Tom L. Wheeler III
 Mr. and Mrs. Dave G. Williams
 Mrs. Evelyn F. Williams
 Mr. Knox Williams
 Mr. W. Grant Williams III
 Ms. Dorothy Williamson
 Mr. Arnold Winter
 Mr. James Wintersteen
 Mr. and Mrs. Thomas E. Workman
 Mr. Robert K. Wormald
 Mr. and Mrs. Donald H. Young
 Ms. Leslie D. Young
 Mr. A. C. Zucaro
 39 Associates have asked to remain anonymous.

HONORING DONOR INTENT

When giving to any nonprofit, you should be able to rely on the organization to do three things:

1. *use your gift to advance its mission;*
2. *honor any restrictions you place on the gift, and*
3. *treat you with respect.*

Unfortunately, many philanthropic organizations have broken faith with their donors.

At The Heritage Foundation, we regard your support as a trust. We hold ourselves strictly accountable to you, and we pledge always to respect your philanthropic intent. Indeed, our Articles of Incorporation demand it.

Should any major donor desire a written contract clearly stating the purpose and intent of the donation and how it shall be spent, we will gladly sign it. Moreover, we make the President of Heritage personally responsible for answering donor questions and reporting expenditures of donor funds.

This is our solemn pledge to you: When you contribute to The Heritage Foundation, your intent as a donor is always honored, never forgotten.



Trustee's Circle member Karen Buchwald Wright of Ariel Corporation addresses the crowd after receiving the "George Washington Generations Yet Unborn Award" at the 2016 President's Club Meeting

KAREN BUCHWALD WRIGHT

MAKING AMERICA BETTER FOR "GENERATIONS YET UNBORN"

The Heritage Foundation established its "George Washington Generations Yet Unborn Award" to honor Heritage members who conspicuously demonstrate their understanding of how their conduct *today* will, as our first president said, "stamp political happiness or misery on ages yet unborn." In December 2016 we were honored to give this award to Karen Buchwald Wright, the President and CEO of the Mount Vernon, Ohio-based Ariel Corporation.

Ms. Wright has headed the Ariel Corporation for the last 16 years. During that time, she transformed the founding generation's small family business into a corporate structure that has grown five-fold. She is now in the midst of passing the business along to her four sons, the third generation to run Ariel.

In addition to building the family business, Ms. Wright has built a family tradition of philanthropy in a way that she hopes will also stand the test of time. In 2009 she formed the Ariel Foundation. For the last decade, the Ariel Foundation, Ariel Corporation, and Ms. Wright have improved the quality

of life for the citizens of Mount Vernon. This includes reviving the beautiful Victorian downtown section, which had suffered dreadfully as commerce fled to shopping malls and big box stores. Ms. Wright and other community leaders also developed an expansive public park on the town's south, as well as numerous other recreational facilities enjoyed by families throughout the Mount Vernon.

Ms. Wright's mission is to give back to the community that supports and nurtures her family's business—and to fund projects and initiatives that will improve the lives of generations yet to come. Since 1993 Ms. Wright has selflessly helped The Heritage Foundation to defend the American dream for future generations by advancing core American principles.

Ms. Wright is one of three exceptional Heritage members honored with our Generations Yet Unborn Award in 2016. Also receiving the award were Florida businessman Rudy Silc and the late Terence H. Murphree of Bellville, Texas, a leader in the energy and construction industries. 📌

WILLIS BRETZ



THE HERITAGE LEGACY SOCIETY

SAFEGUARDING THE BLESSINGS OF LIBERTY FOR FUTURE GENERATIONS

“Posterity, you will never know how much it cost the present generation to preserve your freedom. I hope you will make good use of it.”

—JOHN ADAMS

The members of the Heritage Legacy Society have made a commitment to ensure that the sacred fires of liberty, first set alight by our Founding Founders, will never be extinguished. Chaired by Rae and Belden Bell of Marshall,

Virginia, the Heritage Legacy Society is comprised of members who have remembered Heritage in their wills, trusts, or other planned gifts. We were pleased to welcome the following new members in 2016:

Mr. Warren Alcorn
 Drs. Gary and Diana Arsham
 Mrs. Lincoln E. Barber, Jr.
 Mrs. Jeannette R. Bateman
 Ms. Jean Batten
 Mr. Lloyd Benjamin
 Mr. Everett E. Berg
 Dr. and Mrs. Keith Berry
 Mr. and Mrs. Kyle E. Beveridge
 Mr. Eugene R. Bixby
 Mrs. June M. Boehle
 Mrs. Dorothy J. Bowers
 Mr. Philip G. Brennan
 Mr. Frank W. Browning
 Mr. and Mrs. Robert H. Bruce
 Mr. and Mrs. Reuben D. Burns
 Mr. Victor Carman
 Dr. Gerald M. Casey
 Mr. Richard Cerny
 Mr. John E. Church
 Mr. and Mrs. Daniel M. Cislo
 Mr. and Mrs. Michael Cisson
 Ms. Patricia Clark
 Mr. and Mrs. John B. Clough
 Mr. Robert F. Cook Sr.
 Mr. Dennis Cottier

Mr. Malcolm E. Craig
 Mr. Philip P. Crowley
 Ms. Margaret Day
 Mr. Duane Dunker
 Mr. Charles Eckert III
 Mr. and Mrs. James W. Eggers
 Ms. Lori Eggink
 Dr. and Mrs. Guy R. Estes
 Mrs. Jeanne H. Fallier
 Mrs. Pamela Farmer
 Mr. and Mrs. John P. Fogarty
 Ms. Nancy Franklet
 Mr. Robert G. Fullerton
 Mr. Michael E. Giobbe, Jr.
 Mr. Art Gottily
 Dr. and Mrs. Herbert R. Hahn
 Ms. Carolyn J. Hartung
 Mr. Glenn R. Heidbreder
 Mr. Terry C. Heinz
 Mr. Richard A. Herman
 Ms. Katherine Hicks
 Mr. Thomas F. Hodgman, Sr.
 Mr. and Mrs. Sol N. Hoke
 Mrs. Audre Hunn
 Ms. Judy Ingram
 Mr. Kei K. Ishigami

Mrs. Doris D. Jerman
 Mr. Brian L. Johnson
 The Honorable Roger A. Keats
 Mr. and Mrs. Robert H. Kellen
 Mr. and Mrs. Charles B. Kimball
 Dr. I. Raymond Kirk III
 Mr. Marvin C. Koeper
 Mr. Anten Kraemer
 Mr. Terence Kreider
 Mr. David Laschinger
 Ms. Mary E. Lewis
 Mr. Harrell W. Ligon, Sr.
 Mr. Joseph L. Ligos
 Mr. Rod A. Mace
 Mr. Merlin J. Mason
 Mr. Harold McBride
 Mr. Jay M. McCarrell
 Mr. Robert W. McChesney, Jr.
 Mr. and Mrs. George P. McDonnell
 Ms. Jan Mednick
 Mr. Robert T. Meloy
 Mr. Kenneth M. Mensio
 Dr. and Mrs. Stephen Metz
 Mr. Dennis D. Miles

Mrs. Albert Miller
 Ms. Barbara A. Miller
 Mr. and Mrs. Richard T. Miner
 Mr. and Mrs. Sandefer Mitchell
 Mr. Charles Moon
 Mr. and Mrs. James R. Moore, Jr.
 Mr. Gerry Nagamine
 Mr. and Mrs. Merton M. Nellis
 Mr. Dennis Newkirk
 Mr. Richard Nord
 Mr. Lorne B. Ogmundson
 Mrs. Barbara J. Oliver
 Mrs. Margot J. Patrick
 Mrs. Evelyn P. Pearce Smith
 Mr. and Mrs. James A. Plute
 Mr. and Mrs. Greg Potnick
 Mr. Joe R. Price
 Mr. and Mrs. David Prior
 Mr. Edgar C. Raber
 Mrs. Katherine Rauch
 Mr. David Rew
 Mr. Robert E. Richardson
 Mr. and Mrs. Lon J. Robideaux
 Ms. Dorothy B. Rodgers
 Mr. Robert W. Rust USMC (Ret.)
 Mr. Steven M. Sass

Mrs. Kedren Scales
 Mr. and Mrs. John Schimke
 Mr. Dorin L. Seymour
 Ms. Marcella C. Shannon
 Mr. Kirby Simmons
 Mr. and Mrs. Robert H. Small
 Mr. Thurman Smith
 Mr. Clarence Stott
 Dr. Maritta Sumner
 Mr. John M. Supino
 Mr. Stephen J. Swanson
 Ms. Greta M. Tate
 Mr. and Mrs. Roland Teed
 Mr. Raymond Terrill
 Mrs. Beverly Vining
 Mrs. Charlotte A. Wagner
 Mr. and Mrs. John D. Weiss
 Ms. Lynn White
 Mr. Knox Williams
 Mr. Wayne Williams
 Dr. Robert H. Wise, Jr.
 Mr. Rodney Wood
 Mr. Thomas F. Wylie
 16 Heritage Legacy Society members wish to remain anonymous.

WITH GRATITUDE

We honor the memory of those Heritage Legacy Society members whose gifts we received in 2016.

Mr. Don G. Alexander
 Mrs. Lenore C. Anderson
 Mrs. Margaret Y. Ashcraft
 Mr. Richard F. Aster, Jr.
 Mrs. Constance M. Barefield
 Mrs. Elsie Beekley
 Mr. and Mrs. Robert O. Beeson
 Ms. Teresa M. Bellew
 Mrs. Velna Lou Bernatschke
 Mr. Donald H. Bredeson
 Mr. William R. Broadbent
 Mr. and Mrs. T. Nash Broaddus
 Mr. Robert Brotten
 Mr. Clell G. Brown
 Ms. Anna Ruth Bursma
 Mr. Ralph Caniglio
 Mr. Gerald Caprio
 Mrs. Jessie J. Carlstedt
 Mrs. Donaldeen Colgan

Dr. Robert W. Crecca
 Mr. J. L. Cronin Jr.
 Mr. Edwin E. Cull
 Mr. and Mrs. Ralph F. Daub
 Mr. Russell M. Dembeck
 Mr. Ervin A. Derda
 Mr. and Mrs. Cortlandt S. Dietler
 Mr. Luther L. Dintiman
 Mr. Russell G. Douglas
 Mrs. Louise C. Downs
 Lt. Col. Lee D. Eisenhart, USAF (Ret.)
 Mr. Edward R. Farber
 Mr. Robert A. Finke
 Mr. Patrick Flynn
 Mr. Edward Gannon
 Mrs. Shirley Goehring
 Dr. Robert L. Goetz
 Mrs. Lucie Grant
 Mrs. Marian F. Grebasch

Mr. Albert Haag
 Ms. Marjorie Herrick
 Mr. Miles Hinton
 Ms. Virginia M. Holmes
 Mrs. Nadine C. Houston
 Mr. Charles R. Jones
 Mr. William S. Knight
 Mrs. Wallace Kowalewski
 Mr. Joshua Lepman
 Mr. Carl R. Lezius
 Mr. Ralph L. Lichtfuss
 Mr. Donald L. Lilly
 Mr. Thomas F. Linnen, Sr.
 Mr. Herbert A. Littlefield
 Mrs. Maxine V. Loper
 Mr. James E. Lyons
 Mr. Rod A. Mace
 Ms. Genevieve MacHarg
 Mr. George F. McGregor
 Mrs. Natalie Meckle
 Mrs. Eleanore B. Moderwell

Mrs. Venita Mrok
 Mrs. Kathryn D. Muench
 Mr. and Mrs. Robson S. Newbold
 Mr. Rodney M. Norris
 Mr. John F. O'Connell
 Mr. Thomas M. O'Connor
 Mrs. Nan Osbon
 Mr. Royce A. Peabody
 Mrs. Sylvia Smith Peak
 Mr. and Mrs. Rolland Peckham
 Mrs. Grace Previto
 Mrs. Mary Raymond
 Mr. John S. Reder
 Mr. and Mrs. Fred P. Ritchie
 Mr. Richard A. Robinson
 Mrs. Mary C. Schaaf
 Mr. John Schiller
 Mrs. Lola Shearer
 Mr. Robert W. Sigg

Mrs. Barbara B. Smith
 Mr. Robert Smith
 Ms. Minnie Lou Stephens
 Mr. Lowell F. Steusloff
 Mrs. Ruth M. Stone
 Mr. Thomas P. Strider
 Mr. Pike H. Sullivan
 Mr. William Susen
 Mr. Richard F. Swenson
 Dr. Don Q. Vining
 Mr. Donald A. Wachter
 Mr. E. Granvill Wade, Jr.
 Mr. Charles W. Walton
 Mr. Harvey M. Weitkamp
 Mr. Arnold Winter
 Mr. Robert K. Zelle
 Mr. Thomas R. Zucker

Seven Heritage Legacy Society members asked that their gifts remain anonymous.

RUDY SILC

TRANSMITTING A LEGACY OF FREEDOM TO FUTURE GENERATIONS



After World War II, West Palm Beach, Florida, became one of the nation's fastest growing metropolitan areas. Throughout the 1950s and '60s, a few men of vision seized the opportunity to purchase land and property. One of these men was Rudy Silc—whom Heritage honored in 2016 with its “George Washington Generations Yet Unborn Award.”

A member of America's “Greatest Generation,” Mr. Silc returned from war and promptly entered the civilian workforce. He worked in construction for several years, traveling all over the country, until he met his future wife, Pat, in Fort Lauderdale. In 1961 the Silcs moved to the budding city of West Palm Beach.

Here, Mr. Silc built what would become a successful career in real estate, buying numerous commercial properties. Today, he owns so many properties

that it can become difficult to keep track of them. It's a good problem to have, the result of his policy: “Never sell. If anything, trade for another property.”

Today, at age 90, Rudy Silc still goes to work every day and is *still* making real estate deals—the biggest of his career.

Several years ago Mr. Silc made the generous and selfless decision to include The Heritage Foundation in his estate plans. He became a member of Heritage's Legacy Society.

The Legacy Society includes thousands of patriots like Rudy Silc, supporters to whom we are deeply grateful. Just as the Constitution seeks to ensure the “blessings of liberty to ourselves and our posterity,” Heritage Legacy Society members seek to ensure the blessings of liberty to generations of Americans they will never meet—generations yet unborn. 🇺🇸

WILLIS BRETZ



TOP: Heritage members join in the Pledge of Allegiance at February's Heritage Legacy Society luncheon in Phoenix, Ariz. MIDDLE: Randy Cestone (right) greets Executive Associate and Heritage Legacy Society members Wally and Lynn Volwiler at the Society's luncheon in Tucson. BOTTOM LEFT: Founder and Heritage Legacy Society members Theodore and Sally Brickman meet up with Senior Fellow for National Security Affairs Peter Brookes (right) at the Vero Beach, Fla., dinner in February. BOTTOM RIGHT: Heritage Legacy Society and President's Club Member Patti White (left) and President's Club Member Aida Martin at the Naples dinner in February.

HLS LUNCHEON IN PHOENIX, ARIZ.; HAUTE FRONT PHOTOGRAPHY; HLS LUNCHEON IN TUCSON, ARIZ.; NAPLES DINNER; MICHELLE MCMINN

2016 FINANCIAL STATEMENTS

STATEMENT OF FINANCIAL POSITION*

As of December 31, 2016

ASSETS

Cash and cash equivalents	\$7,419,517
Receivables	7,142,526
Prepayments and other assets	968,624
TOTAL CURRENT ASSETS	15,530,667

Investments	188,432,309
Receivables, net	7,357,075
Property and equipment, net	76,916,027
Other assets	790,149
TOTAL LONG-TERM ASSETS	273,495,560

TOTAL ASSETS	\$289,026,227
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LIABILITIES AND NET ASSETS

Accounts payable and accrued expenses	\$10,826,986
Notes payable	548,805
TOTAL CURRENT LIABILITIES	11,375,791

Notes payable	22,469,756
Deferred obligations and planned gifts	14,500,086
TOTAL LONG-TERM LIABILITIES	36,969,842

TOTAL LIABILITIES	\$48,345,633
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Unrestricted net assets:

Board designated	110,975,192
Undesignated	78,196,896
Temporarily restricted net assets	44,583,295
Permanently restricted net assets	6,925,211
TOTAL NET ASSETS	240,680,594

TOTAL LIABILITIES AND NET ASSETS	\$289,026,227
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STATEMENT OF ACTIVITIES*

Year ended December 31, 2016

OPERATING REVENUES

Contributions:	
Individuals	\$56,665,969
Foundations	15,847,481
Corporations	1,402,142
TOTAL OPERATING CONTRIBUTIONS	73,915,592

Investment withdrawal	15,011,765
Program revenue	195,562
Rental and other income	2,780,216
TOTAL OTHER OPERATING INCOME	17,987,543

TOTAL OPERATING REVENUES	\$91,903,135
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OPERATING EXPENSES

Research	\$23,684,630
Education	28,739,874
Media and government relations	8,401,883
TOTAL PROGRAM SERVICES	60,826,387

Fundraising	13,310,682
Management and general	2,303,769
TOTAL SUPPORTING SERVICES	15,614,451

TOTAL OPERATING EXPENSES	\$76,440,838
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NET GAIN FROM OPERATIONS	\$15,462,297
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NON-OPERATING ACTIVITIES

+ Restricted contributions	\$20,922,826
+ Net investment Gain	14,432,520
(-) Depreciation	4,101,357
(-) Interest expense	812,721
(-) Investment withdrawal	15,011,765
(-) Change in restricted net assets	16,494,321

TOTAL NON-OPERATING ACTIVITIES	\$(1,064,818)
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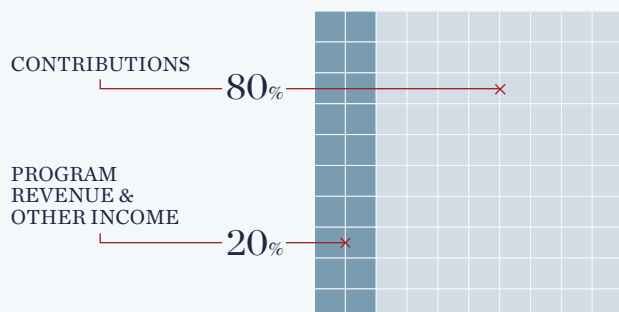
CHANGE IN NET ASSETS	\$14,397,479
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NET ASSETS—Beginning of year	\$226,283,115
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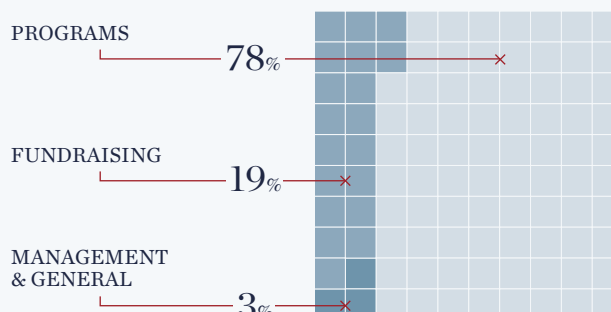
NET ASSETS—End of year	\$240,680,594
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*Preliminary results for The Heritage Foundation only. Heritage Action reports its financials separately. Final audited financial statements will be available on or after July 31, 2017

2016 OPERATING REVENUES



2016 OPERATING EXPENSES





THE HERITAGE FOUNDATION

LEADING AMERICA'S RESURGENCE

OUR MISSION: *To formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense.*

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**As of May 2, 2017*

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WHAT THEY'RE SAYING ABOUT HERITAGE

Conservatives have the Heritage Foundation as their beacon for economic policy.

—DIERDRE FERNANDES, "UMASS ECONOMISTS FIND A PLACE DURING THE YEAR OF THE OUTSIDER,"
THE BOSTON GLOBE, MARCH 1 2016

Trump has relied heavily on the Heritage Foundation for his tax policy and his attitude to welfare and 'entitlements' like social security...

—INDERJEET PARMAR, "SHOCK BUT NOT SURPRISE AS TRUMP VICTORY REPLAYS BREXIT ALL OVER AGAIN,"
THE WIRE, NOV. 11, 2016

... prepared the template for the planned increase in defense spending featured in Trump's campaign...

—MARJORIE CENSER AND TONY BERTUCA, "TRUMP'S WHITE HOUSE WIN RESHUFFLES
THINK TANK PECKING ORDER IN WASHINGTON," *INSIDE DEFENSE*, NOV. 16, 2016

... a driving force... Part gate-keeper, part brain trust and part boots on the ground, Heritage is both a major presence on the transition team itself and a crucial conduit between Trump's orbit and the once-skeptical conservative leaders who ultimately helped get him elected.

—KATIE GLUECK, "TRUMP'S SHADOW TRANSITION TEAM,"
POLITICO, NOV. 22, 2016

WHAT THEY'RE SAYING ABOUT HERITAGE ACTION

The Heritage Action Policy Summit [is] the sanctum sanctorum of conservative activism in Washington.

—MIKE DEBONIS, "MEMO TO PAUL RYAN: OBAMA SHOULDN'T GET A PASS,"
THE WASHINGTON POST, FEB. 5, 2016

... one of Washington's most feared advocacy groups. ... its scorecard can inspire primary challengers against Republicans who stray from conservative orthodoxy.

—ELISE VIEBECK, "MICHAEL NEEDHAM WAS STOKING FEAR IN REPUBLICANS LONG BEFORE DONALD TRUMP,"
THE WASHINGTON POST, MARCH 8, 2016

Heritage Action, regularly goes after Republican members of Congress who don't live up to their standards. They keep a meticulous legislative scorecard, tracking nearly every floor vote and broadcasting the results to a grassroots army across the country.

—PHILIP WEGMANN, "HERITAGE FOUNDATION TAKES RISK AND WINS BIG WITH TRUMP,"
WASHINGTON EXAMINER, NOV. 10, 2016

