



# A SEASON OF GROWTH, A YEAR OF ACHIEVEMENT

2017 ANNUAL  
REPORT

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



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A YEAR OF ACHIEVEMENT**

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*Heritage hosted more than 2,000 members and friends from across the country during our two-day Open House celebrating the Presidential Inauguration.*

## A Message from the Chairman and President

# A Season of Growth, A Year of Achievement

In 1980, Heritage's 3,000-page *Mandate for Leadership* gave the incoming Reagan administration and Congress a comprehensive set of policy recommendations for revitalizing the economy, strengthening national security, and halting the centralization of power in the federal government.

Washington observers soon began calling it “the Bible of the Reagan administration.” By the end of President Reagan's first year in office, hundreds of Heritage's recommendations had been adopted—and Americans were benefiting from historic tax cuts and an economic recovery that hasn't been matched since.

Heritage has now repeated that winning pattern. Preparing for the election of a new president and Congress in 2016, Heritage developed a new *Mandate for Leadership*—a six-volume series of conservative, research-based policy recommendations calculated to help the next president “Make America Great Again.”

By the time we closed the book on 2017, the Trump administration had embraced 64 percent of our 321 recommendations. Congress embraced many of them too: enacting once-in-a-generation tax reform, rolling back onerous regulations, and starting the long haul toward rebuilding our dangerously depleted military. And once again, Washington observers referred to Heritage as “the president's think tank.”

### Restoring Constitutionalism to the Courts

The year began strong, with the nomination and confirmation of Justice Neil Gorsuch to the U.S. Supreme Court. In March 2016, candidate Trump had asked Heritage to help put together a list of superior candidates for the empty court seat. John Malcolm, director of our Meese legal center, obliged. A January 2017 *Politico* profile of Malcolm subsequently dubbed him “the man who picked the next Supreme Court justice.”

There were many other outstanding judicial appointments as well. The Senate confirmed 12 circuit court judges in 2017—the largest number of appellate judges confirmed during the first year of any president in history. Most federal cases stop at the appellate level—only one of every 700 cases heard by

the federal appellate courts goes on to the Supreme Court. So these “lower” court appointments are critical.

### Promoting Pro-growth Tax Reform

The highlight of the year, of course, was the groundbreaking tax reform signed into law just before Christmas. In early summer, Trump asked Mick Mulvaney, director of the Office of Management and Budget, to come up with a plan to get America's economy back on track. And Mulvaney quickly called on us to help.

Stephen Moore and our tax policy experts outlined these principles to guide the reform effort: lower both corporate and individual tax rates; increase standard deductions and reduce special-interest “carve outs”; promote entrepreneurship by making capital expenses fully deductible in the year they are incurred; and establish a territorial tax system that levels the playing field for American companies competing in the global marketplace.

The reform package enacted in December reflects those principles, transforming the tax code to one that promotes rather than penalizes economic growth. And the American people began to reap the benefits almost immediately—with higher take-home pay, tax-cut-fueled bonuses, and a burgeoning job market.

### Reining in the Regulatory Regime

In February, Congress began acting on another of our key recommendations: to exercise their authority under the long-ignored Congressional Review Act to overturn ill-considered rules implemented by the Executive Branch. Within months, Congress used CRA resolutions to scotch 14 major rules finalized by the Obama administration in its waning days.

Also in March, *The Washington Post* reported that an executive order had “dismantled a White House working group on



*Kay Coles James, President  
Edwin J. Feulner, Former President*

## The Torch Passes

Heritage's six-month search for a worthy successor to Heritage President Edwin J. Feulner came full circle with the selection of long-time Heritage Trustee Kay Coles James.

The decision was announced Dec. 19 at an all-staff meeting in Allison Auditorium. It was met with great enthusiasm by Heritage staff, as well as conservative leaders across the country. (See back cover.)

That enthusiasm is well-grounded. In a career spanning more than four decades, James has excelled in a variety of posts in government, the private sector, the academy, and the non-profit world. In the late 1990s, she joined Heritage as a senior fellow and director of our Citizenship Project. She left to serve President George W. Bush as director of the U.S. Office of Personnel Management. In 2005, she was elected to our Board of Trustees.

In 2016, James and her Heritage colleague, former U.S. Attorney General Edwin Meese III, led President Trump's transition team for the Office of Management and Budget, Office of Personnel Management, and General Services Administration.

In her first address as Heritage president, James told the staff:

*Heritage is many things to me:*

- *The single most significant force in American conservatism,*
- *The home of the most extraordinary scholars and staff I've ever met,*
- *A network of dedicated alumni, who are not just a key part of the Heritage family but a vital asset for promoting our agenda in every corner of America,*
- *A leading center for the training and expertise of the well-equipped team that's so crucial to advancing our principles and beliefs,*
- *And the living vision of the trustees and benefactors whose generosity supports us. Their intent is and will always be honored, and their resources will continue to be shepherded wisely—because what they've helped to create must and will last for generations.*

With Kay Coles James at the helm, Heritage will remain, in the words of *The Wall Street Journal* editorial hailing her appointment, "True North." 📌

DAVID HILLS

the social cost of carbon and rescinded a variety of Obama-era technical documents on the matter.” It was, the *Post* noted, “a big victory” for Heritage alumnus David Kreutzer, who “played an important role in shaping and writing the executive order.”

That was just the beginning of a huge regulatory rollback. Trump lifted the Obama-era moratorium on coal leases on federal lands and instructed Executive Branch agencies to reconsider the misleadingly named Clean Power Plan and hugely intrusive “Waters of the United States” regulations. All of these deregulatory actions—and more—came recommended by Heritage.

By year’s end, the Trump administration had withdrawn or delayed more than 1,500 proposed regulations. The change was so significant, we had to change the name of our annual report on the number and cost of regulations from “Red Tape Rising” to “Red Tape Receding.”

And those changes made a difference. On Dec. 14, Trump announced that the regulatory rollback had saved the American economy \$8.1 billion, and would save another \$9.8 billion in fiscal 2019.

Moreover, the president embraced Heritage’s call for “culture change” within the regulatory agencies. He directed them to be more deliberative about their rulemaking, to seek ways to offset new regulatory costs, and to create internal regulatory reform task forces in each agency.

### The Road Ahead

Of course, it’s never all roses in Washington. We were sorely disappointed when the Senate fumbled Obamacare repeal—and fumbled it badly. Even though congressional conservatives were able to fold repeal of Obamacare’s individual mandate into the tax reform bill, there is much yet to do before we are rid of this unworkable, unaffordable attempt to impose government-controlled health care on our nation.

Naturally, we are trying to accomplish much more than “just” health reform. Our mission remains bold: to build an America where freedom, opportunity, prosperity, and civil society flourish. And we have our work cut out for us!

As events like this spring’s March for Our Lives and School Walk-Outs make clear, the Left continues to be better than conservatives in both messaging and mobilization. Their sophisticated tactics enable community organization by a radical few to look like organic action by millions of Americans. This has played out again and again, and it will continue to happen until conservatives fully understand how the Left



## Mandate for Leadership



Released in 1981, Heritage’s original *Mandate for Leadership* offered policy recommendations for making government more efficient and accountable. It became a surprise best-seller. It also became widely recognized as “the Bible of the Reagan administration,” establishing Heritage’s reputation as a mover-and-shaker in Washington.

In 2016, Heritage produced a *Mandate for Leadership* series: six books containing 321 major policy recommendations for the incoming administration and the new Congress. Individual titles in the series were:

- *Blueprint for Reform: A Comprehensive Policy Agenda for a New Administration in 2017*
- *Blueprint for a New Administration: Priorities for the President*
- *Blueprint for Reorganization: An Analysis of Federal Departments and Agencies*
- *Blueprint for Reorganization: Pathways to Reform and Cross-Cutting Issues*
- *Blueprint for Balance: A Federal Budget for Fiscal Year 2018*
- *Farms and Free Enterprise: A Blueprint for Agricultural Policy*

In its first year, the Trump administration embraced fully **64 percent** of the *Mandate* recommendations. No wonder the *New Republic* called Heritage “The D.C. Think Tank Behind Donald Trump” and the University of Pennsylvania ranked us as the No. 1 think tank globally in terms of impact on public policy.



### *From Distinguished Fellow to EVP*

Kim R. Holmes, Ph.D.

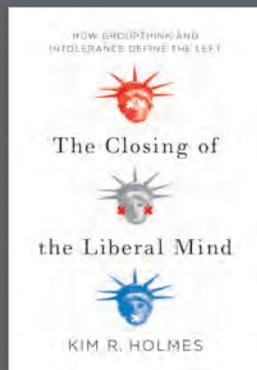
Dr. Kim R. Holmes began the year as a Heritage distinguished fellow. But in April, Edwin J. Feulner asked him to serve as our acting senior vice president for research.

Overseeing research was nothing new to Holmes. Prior to being named a distinguished fellow, he had directed our foreign and defense policy studies for more than two decades.

In addition to managing our entire research program, Holmes continued to write on a wide range of subjects, from the sad legacy of the Russian Revolution to how the American Left became so intolerant.

His extraordinary year ended on several high notes. In September and October he went on an extensive speaking tour through Europe, lecturing in international forums in France and Germany and at a series of events organized by the U.S. embassies in Switzerland and Austria. In December, Encounter Books reissued his third book, *The Closing of the Liberal Mind: How Groupthink and Intolerance Define the Left*, in paperback.

Things got even better for Holmes in 2018. On February 6, the Board of Trustees voted unanimously to make him Heritage's executive vice president.



does this, unmask each instance it occurs, and advance conservative solutions with equal skill.

Turning this table is a core part of the mission we are working to fulfill at Heritage. This is no mere parlor game, either—instead, it's a battle for our nation. America has shifted leftward over the past decades and is suffering real harm due to bankrupt liberal policies. Today, we are the world's largest debtor nation, with a fragmented society, often-forgotten First Principles, and a challenging future.

That's the bad news. The good news is this is a battle we can win. We know we not only need good policy—we need to make good policy happen. And we will work tirelessly to do so until our mission is achieved and America's future is secured.

As Americans rang in the New Year 2018, they were already enjoying noticeably more freedom, opportunity, and prosperity than they had a year earlier. That is vital progress, and we continue to build upon it. And you, through your support of Heritage and our mission, are largely responsible for making it possible.

The effectiveness of our work—*your* work—has not gone unnoticed. That's why the University of Pennsylvania's highly respected Think Tanks and Civil Societies Program has now ranked Heritage No. 1 among all global think tanks in terms of impact on public policy.

But we're not resting on our laurels. Instead, we are continuing to drive the conservative policy agenda forward, and we are confident we'll have even more progress to report for 2018. Meanwhile, we hope you enjoy this report on how much your involvement with Heritage has helped us achieve—on behalf of all Americans—in 2017.

Sincerely,



**Thomas A. Saunders III**  
Chairman



**Kay Coles James**  
President

DAVID HILLS

## Heritage by the Numbers in 2017

|  |   |
|--|---|
| <b>208</b> Heritage policy recommendations adopted by the Trump administration | <b>389,783</b> Subscribers to Heritage's The Agenda newsletter                  |
| <b>199</b> Lectures & Seminars conducted                                       | <b>30.2MM</b> DailySignal.com site sessions                                     |
| <b>154</b> Issue Briefs published  | <b>504,637</b> Subscribers to <i>The Daily Signal's</i> Morning Bell newsletter |
| <b>99</b> Backgrounders published  | <b>202MM</b> Views of Heritage and <i>Daily Signal</i> Videos                   |
| <b>27</b> Legal Memoranda published  | <b>1,169</b> Commentaries placed in major print/online publications             |
| <b>9</b> Special Reports published   | <b>1,147</b> Television interviews conducted                                    |
| <b>31</b> Congressional testimonies delivered                                  | <b>3,174</b> Radio interviews conducted   |
| <b>12.4MM</b> Heritage.org visitor sessions                                    |   |
| <b>2.1MM</b> Heritage Facebook fans  |   |
| <b>626,000</b> Heritage Twitter followers                                      |   |

More than **half a million members**—who made all of the above possible.  
**Thank you!**

## Honors Given ...

The *Washington Free Beacon* received our **Henry Salvatori Prize for American Citizenship** (May 11).

Susan B. Anthony List President **Marjorie Dannenfelser** received our Robin and Jocelyn Martin **Distinguished Intern Alumni Award** (Oct. 17).

District of Columbia Circuit Judge **Brett M. Kavanaugh** received our **Defender of the Constitution Award** (Oct. 25).

## ... Honors Received

**David Azerrad**, director of Heritage's Simon Center for Principles and Politics and AWC Family Foundation fellow, received the American Legion's **National Education Award** in "recognition and appreciation of his dedication to increasing public understanding of America's founding principles" (Aug. 19).

**Jonathan Butcher**, a senior policy analyst in Heritage's Center for Education Policy, was a co-recipient of the State Policy Network's **Bob Williams Award for Most Influential Research** (Aug. 30).

Former Attorney General **Edwin Meese III**, the Ronald Reagan distinguished fellow emeritus at Heritage, received the Military Order of Foreign Wars of the United States' **Distinguished Service Medal** (June 17), Eagle Forum's **Phyllis Schlafly Award for Excellence in Leadership** (Sept. 23) and the Pacific Justice Institute's **Founders Award** (Oct. 28).

*The American Spectator* presented its **John Von Kannon Service to the Cause Award** to Heritage Founder **Edwin J. Feulner** "for his indispensable contributions to the advancement of conservative public policies and principles" (Sept. 26).

## In Memoriam

### Roger Ailes

A communications visionary, a champion of free speech and a free press, and recipient of the Clare Boothe Luce Award, Heritage's highest honor. He took a cable TV upstart—Fox News Channel—and turned it into something not seen in decades: a national news outlet that presented all points of view fairly.

### Helen DeVos

One of America's most widely admired philanthropists. She and her husband, Richard, generously supported dozens of good causes and projects, from the Helen DeVos Children's Hospital to Heritage's Richard & Helen DeVos Center for Religion and Civil Society.

### John F. "Jack" Donahue

A longtime supporter of Heritage and a great Christian philanthropist. During his lifetime, he and his wife, Rhodora, received numerous awards, including the Becket Fund's "Canterbury Medal," given in recognition of their commitment to defending religious liberty.

### Kate O'Beirne

One of the conservative movement's wittiest, warmest, and wisest voices. Before winning national acclaim as a writer/editor for *National Review*, Kate served admirably as our deputy director of domestic policy studies, then led our Congressional Relations team in the post-Reagan era.

### Richard Odermatt

A beloved colleague and Heritage's longest-serving employee. One of the most erudite men in Washington, Richard was our director of research editing at the time of his death. The office suite housing our research editors now bears his name.

Have a question about the federal budget, government spending or the national debt? **Romina Boccia** has the right answer.

As deputy director of our Roe Institute for Economic Policy Studies (and our Grover M. Hermann Research Fellow), Boccia leads the team that crafts our annual *Blueprint for Balance*—a report detailing how Congress can balance the budget within 10 years by rightsizing the federal government in accordance with the Constitution.

Every year, that balancing act gets more difficult. But every year, that report gets more influential. The 2017 *Blueprint for Balance* profoundly influenced President Trump’s so-called “skinny budget” proposal. And the Republican Study Committee’s 2017 budget followed our *Blueprint’s* recommendations almost to the letter.

Unfortunately, neither of those budgets survived Washington’s legislative process. Boccia’s response? To form the Fiscal Control Alliance, a working group of 25 budget experts from conservative and moderate organizations with one common purpose: to put an end to autopilot spending growth by identifying and promoting budget process reforms and enforcement mechanisms that would enshrine fiscal discipline in federal entitlement programs.



**Romina Boccia**  
Grover M. Hermann Fellow in Federal Budgetary Affairs



Former Attorney General Edwin Meese III (LEFT) presented our Defender of the Constitution Award to Judge Brett M. Kavanaugh (RIGHT) of the U.S. Court of Appeals for the District of Columbia Circuit. Kavanaugh also delivered Heritage’s 10th annual Joseph Story Lecture in October.

At the 2017 Resource Bank meeting in Colorado Springs, the Simon Center awarded Heritage’s 2017 Salvatori Prize for American Citizenship to The Washington Free Beacon for its investigative work exposing corruption in the media and in government. David Azerrad (RIGHT) presented the award to Editor-in-Chief Matthew Continetti (LEFT), May 11.



DAVID HILLS, NATHAN ARMES, WILLIS BRETZ



*President Donald J. Trump hosts a Sept. 27 dinner for conservative leaders in the Blue Room of the White House. To his immediate left is Dr. Edwin J. Feulner, founder and then-president of Heritage.*

## The Price of Success

Heritage bid farewell to some great people in 2017. The Trump administration snapped up more than 70 of our staff and alumni.

Three who left us early on were:

- **Paul Winfree**, director of our Roe Institute for Economic Policy Studies, who took on dual roles at the White House as director of budget policy and deputy director of the Domestic Policy Council.
- **Nina Owcharenko Schaefer**, our Preston A. Wells, Jr., fellow in health policy, who left to serve as senior counselor to the secretary of Health and Human Services.
- **Dr. David Kreutzer**, a senior research fellow in our Center for Data Analysis and one of the sharpest critics of the EPA's radical carbon control agenda, who signed up as senior advisor at the EPA to inject some common sense into the agency's economic analyses.

These three have since returned to Heritage, but many of their Heritage colleagues still toil within the Trump administration, bringing conservative principles to bear throughout the Executive Branch.

**John Mitnick**, Heritage's senior vice president, general counsel, and secretary, was selected to serve as general counsel for the Department of Homeland Security.

SHEALAH CRAIGHEAD

**Russ Vought**, a vice president at Heritage Action for America, was tapped to be deputy director of the Office of Management and Budget, the No. 2 job at an agency that wields powerful influence over government spending.

And then there's **Justin T. Johnson**, now a special assistant to the deputy secretary of defense. And **Steven Groves**, initially drafted as chief of staff to UN Ambassador Nikki Haley but now deputy to White House Special Counsel Ty Cobb. And **Lisa Curtis**, the National Security Council's senior director for South and Central Asia. And **Roger Severino**, head of the Civil Rights Office at the Department of Health and Human Services.

These have joined company with scores more Heritage alumni in the Executive Branch, from Transportation Secretary **Elaine Chao** to Secretary of the Army **Mark Esper**.

While we regret losing so many talented people to a new administration, it really is a blessing. As Edwin J. Feulner often observes, "People are policy," and having the right people in place to advance our policy recommendations was one of the keys to Heritage's phenomenal success in 2017. 🏠



## *Lindsey M. Burke*

Heritage's Will Skillman fellow in education and the director of our newest research hub: The Center for Education Policy

# The Institute for Family, Community, and Opportunity

As a high-schooler, Lindsey Burke knew exactly where she wanted to work: at The Heritage Foundation.

In college, she was torn between two great passions: French and public policy. Ultimately, she chose political science as the more promising pathway to Heritage.

But after earning her bachelor's degree, Burke still wasn't ready to abandon her other love. So she got a master's in foreign language education and began teaching French in rural western Virginia.

In 2008, she learned that Heritage was looking for a research assistant to help Dan Lips, a pioneer in the school choice movement. It was the opportunity of her dreams, and she jumped at it.

Burke was hired. Five years later, she was named our Will Skillman fellow in education policy. And in 2017, she was picked to launch our newest specialty research hub: the Center for Education Policy.

DAVID HILLS



*The DeVos Center's Ryan Anderson (LEFT) and Jennifer Marshall (RIGHT) speak at a "Justice for Jack" rally on the Supreme Court steps the day of oral arguments in the Masterpiece Cakeshop case.*

As the center's director, Burke supervises two other scholars and all of Heritage's initiatives to empower families with education choice and reduce federal intervention in all levels of schooling—from kindergarten through college. Under her leadership, the center got off to a very fast start.

In April, less than three months after the center's launch, Arizona Gov. Doug Ducey signed a bill dramatically expanding the state's education savings account (ESA) program—to all 1.1 million Arizona schoolchildren. Their parents can opt to have at least 90 percent of their children's share of state education funds go into personal ESAs. And they can use that money for private school tuition, tutoring, educational therapy, home-schooling materials—whatever they think best meets their children's educational needs.

Of course, that victory was not achieved in just three months. Heritage and the Phoenix-based Goldwater Institute had worked for years to make the case for how ESAs would benefit all Arizona families. And before 2017 ended, Burke and her team notched another victory: North Carolina became the sixth state to enact an ESA program.

The center's first federal policy victory came in December. During the tax reform debate, the education team preached the advantages of letting families use funds in their 529 college savings for K-12 private school tuition, as well. Their arguments prevailed, and that provision was included in the tax bill—a huge advance for the school choice movement.

The center opened up a new front in the battle for school choice in July. That's when Burke and Research Assistant Anne Ryland came up with the idea of "A GI Bill for Children of Military Families." Their groundbreaking proposal: shift federal Impact Aid from the coffers of schools districts near

military bases to individual education savings accounts controlled by the students' families.

The program would not require any new federal funding, but it would allow our service men and women to decide how and where their kids receive their education, be it via public or private schools, home-schooling or other education options. The proposal promises to improve not only education outcomes, but military retention rates as well.

The win-win idea sparked immediate interest on Capitol Hill. A formal legislative proposal may be introduced as early as 2018. Not bad for a brand new center.

### Defending Religious Liberty

Our DeVos Center for Religion and Civil Society had a change in leadership, but never a change in its mission to protect and promote marriage, life, and religious liberty.

President Trump selected Center Director Roger Severino to serve as director of the Office for Civil Rights in the Department of Health and Human Services (HHS). *The Atlantic* subsequently dubbed him "the man behind Trump's religious-freedom agenda for health care."

Assuming Severino's responsibilities at Heritage was Emilie Kao, an accomplished attorney who had spent the previous 14 years defending the free exercise of all faiths from posts in the State Department's Office of International Religious Freedom and at Becket Law, a nonprofit public-interest legal foundation.

Kao lost no time putting that experience and commitment to work. With Meese Center Director John Malcolm, she co-authored a Legal Memorandum explaining the legal issues



On Nov. 16, Vice President Jennifer Marshall hosted Heritage’s fourth annual Antipoverty Forum, gathering members of Congress, White House and congressional staff, and think tank experts. Welfare reform is expected to be back on Washington’s agenda within the next two years.

Following the forum, Marshall and Heritage welfare expert Robert Rector were in high demand by congressional and White House staff seeking feedback and improvements to the reform proposals they are working up.



TOP: Jennifer Marshall and Rep. Jim Jordan, R–Ohio, BOTTOM, FROM LEFT: Marie Fishpaw, Robert Rector, and Paul Winfree.

in *Masterpiece Cakeshop v. Colorado Civil Rights Commission*, one of the most consequential cases argued before the Supreme Court in 2017.

The case concerns Jack Phillips, a Colorado baker whose religious beliefs led him to decline a request to create a custom cake for a same-sex wedding. The Left claims this is discrimination. That’s not the case. Jack has served all customers for 24 years, but he simply can’t express all messages.

The DeVos Center explored other aspects of the debate in several public events, such as its panel discussion of “Uncivil Discourse: Why the Left Is Wrong to Compare Traditional Marriage Supporters to Racists.”

On the day the justices heard oral arguments in *Masterpiece*, Jennifer Marshall, vice president of our Institute for Family, Community, and Opportunity, joined Dr. Ryan T. Anderson, our William E. Simon senior research fellow in American principles and public policy, on the steps of the Supreme Court to address a large crowd rallied in support of religious freedom. The court will render its decision in 2018.

The center didn’t have to wait until then for good news, though. The Supreme Court delivered a big win for religious liberty on June 26. That’s when the justices ruled 7-2 in favor of Trinity Lutheran Church in its suit against the state of Missouri.

The church had applied for state grant money to resurface its pre-school playground. Even though its safety improvement plan met all of the program’s criteria for funding, the state claimed it could not permit government funds to go to a church.

The court, however, saw it differently. Writing for the majority, Chief Justice John Roberts announced that “the exclusion of Trinity Lutheran from a public benefit for which it is otherwise qualified, solely because it is a church, is odious to our Constitution... and cannot stand.”

The significance of the decision goes far beyond the playground at Trinity Lutheran. As Kao explained in a *Daily Signal* commentary, the larger lesson is that pressuring religious communities to renounce their beliefs by threatening to exclude them from competing in government programs is an unconstitutional violation of religious freedom.

Not all of the center’s victories came in the courtroom. On March 31, Congress passed a Congressional Review Act resolution overturning an HHS rule that barred states from denying Title X family planning funds to abortion providers. The Obama-era rule had effectively required states to fund Planned Parenthood.

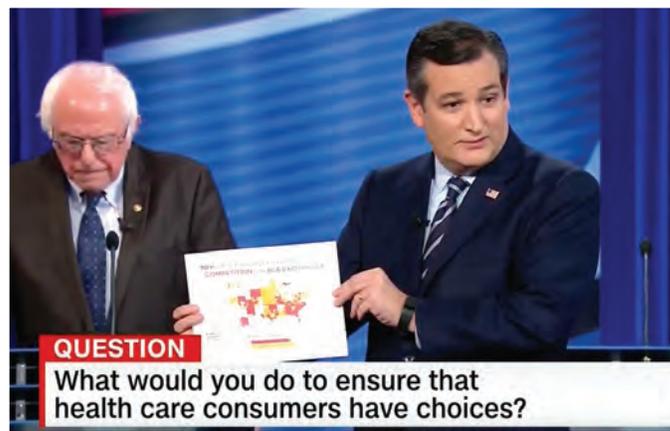
Another highlight for the center: publication of *Debating Religious Liberty and Discrimination* (Oxford University Press). Co-authored by Wayne State University’s John Corvino (an LGBT advocate), Princeton’s Sherif Girgis, and Ryan T. Anderson, the book presents a point-counterpoint exploration of how to promote the common good while respecting conscience and religious liberty in a diverse society.

“If American society follows the lead of this book, our culture wars won’t end, but they just might be kinder and smarter,” wrote Russell Moore, president of the Ethics & Religious Liberty Commission of the Southern Baptist Convention.

ERIN GRANZOW



*J.D. Vance, best-selling author of Hillbilly Elegy, keynoted the July 20 launch of the 2017 Index of Culture and Opportunity. Vance also wrote the introduction to the Index, edited by Heritage Vice President Jennifer Marshall.*



*During a two-hour, primetime debate on CNN with Sen. Bernie Sanders, I-Vt., (LEFT), Sen. Ted Cruz, R-Texas, (RIGHT) held up a Heritage chart showing the lack of competition in many Obamacare exchange markets.*

## Fixing a Failing Health Care System

Heritage's Domestic Policy Studies team also welcomed a new leader. When Director Nina Owcharenko joined the administration as senior counselor to HHS Secretary Tom Price, she was replaced by Marie Fishpaw.

As a former policy advisor to Vice President Cheney and congressional members and as a businesswoman who helped launch a tech company, Fishpaw has deep experience providing leadership for the most complex opportunities.

That experience came into play throughout the year, as the Domestic Policy team highlighted the need for Congress to start undoing Obamacare's damage.

Of course, Heritage first pushed for total repeal of Obamacare. Congress's failure to do so was scandalous. But it could have been worse.

In March, Congress was poised to pass the American Health Care Act. A non-repeal "repeal" bill, it would have left Obamacare's costly regulations largely in place—a spectacular

failure that would move us no closer to achieving free-market, patient-centered reform.

Senior Fellows Edmund Haislmaier and Dr. Robert Moffit explained to lawmakers—and the media—why it would be so much better to get the federal government out of running the insurance markets and instead expand personal choice in health care. That, they argued, is the path to making high-quality care available at affordable prices.

Though disappointed with the failure of the initial drive to repeal Obamacare, the team saw a chance to take a second bite at the apple when the tax reform debate began. The only reason the individual mandate was not struck down years ago was because the Supreme Court saw fit to call it a "tax." So what better way to repeal a mandate-cum-tax than with tax reform?

Our Domestic Policy team kicked into high gear to make the individual mandate a thing of the past. And it became exactly that, when President Trump signed the tax reform bill into law just days before Christmas. 🇺🇸

## 2017 Testimonies by Scholars in the Institute for Family, Community, and Opportunity



**Jan. 24:** *The Real Changes in Health Insurance Enrollment Under the Affordable Care Act*  
Edmund F. Haislmaier before the House Budget Committee

**Sept. 12:** *Health Care: Issues Impacting Cost and Coverage*  
Edmund F. Haislmaier before the Senate Finance Committee



## *Thomas W. Spoehr*

Director of the Davis Institute's Center for National Defense

# The Kathryn & Shelby Cullom Davis Institute for National Security and Foreign Policy

November 30 was a special day for Thomas W. Spoehr, director of our Center for National Defense. He was going to give congressional testimony about how the Pentagon should revise its National Defense Strategy.

It wasn't the subject matter that had Spoehr so excited, though. A retired Army lieutenant general, he is a master of strategic thinking. What made the day special for Spoehr was his audience—the Senate Armed Services Committee—more specifically, its chairman, Sen. John McCain, R-Ariz.

Whatever you may think of McCain's politics, he is indisputably a true war hero, courageous, and true to his country even

in the face of horrific torture. As a professional soldier, Spoehr always regarded McCain as a role model, yet in 36 years in uniform, he had never met him.

That changed on Nov. 30. And the testimony Spoehr delivered that day helped guide development of the new—and vastly improved—National Defense Strategy, released in January 2018.

DAVID HILLS



Scenes from the October 5 event marking the release of the latest Index of U.S. Military Strength (LEFT TO RIGHT): Rep. Mac Thornberry, R-Texas, chairman of the House Armed Services Committee; Index Editor Dakota L. Wood, Heritage's senior research fellow in defense programs; John "JV" Venable, senior research fellow for defense policy.

Compared to the previous, Obama-era strategy document, this one assesses both our potential adversaries and our own “eroding military advantage” more honestly. Perhaps most important of all, it stresses the need for “rebuilding military readiness.”

This echoes a central theme in President Trump's National Security Strategy, a document released one month earlier. Not coincidentally, the theme reflects the core findings of the Defense Center's premier research document, *The Index of U.S. Military Strength*.

For four years running, the *Index* has documented the deterioration of our military's capacity to meet growing global threats. Currently, we have only two-thirds of the military resources we need—and only a third of what we have is combat-ready. But the tide began to turn in 2017.

The National Defense Authorization Act, signed in December, included many of Heritage's recommendations. For example, it authorized: an \$80 billion increase in defense spending, 90 new F-35 Joint Strike Fighters, 24 Navy F/A-18 Super Hornets, 13 new combat ships, a significant expansion of ballistic missile defenses, and a greater military presence in the Asian-Pacific. Every one of these improvements came directly from Heritage's playbook for rebuilding military strength.

Several other initiatives championed by Heritage for years also made their way into the act. For example, it authorized imposing economic sanctions on individuals abetting Russia's repeated violations of the Intermediate-Range Nuclear Forces (INF) Treaty. It also barred lowering the alert levels of our own nuclear forces.

WILLIS BRETZ

### Standing Up to Russia

Heritage had long urged President Obama to push back against Vladimir Putin's aggressive adventurism—and with more than just sanctions for its treaty violations. The new administration proved far more receptive to our recommendations.

In June, President Trump acted on our request that he meet with Ukraine President Petro Poroshenko. Six months later, the U.S. State Department announced it would provide Ukraine with “enhanced defensive capabilities” for its ongoing battle with Russian-backed separatists.

Similarly, State approved the sale of Javelin anti-tank missiles to Georgia, which Russia has illegally occupied since 2008. Luke Coffey, director of our Allison Center for Foreign Policy Studies, had advocated providing both Ukraine and Georgia with lethal arms in their fight against Russian expansionism.

In another none-too-subtle swipe at Moscow, the Senate voted 97–2 to admit tiny Montenegro into NATO. Heritage had long endorsed that move, and our arguments were only strengthened after Russia engineered an attempted 2016 coup of Montenegro's freely elected government.

### Opposing Chinese Expansionism and North Korean Lawlessness

All talk, no action—that pretty much summed up President Obama's celebrated “Pivot to Asia.” China continued to press its expansive territorial claims, threaten international sea-lanes and air space, and accelerate its military build-up. North Korea continued to advance its illegal nuclear and ballistic missile programs.



**Jan. 9:** *China's S&T and Innovation Efforts*  
**Dean Cheng** before the House Armed Services Committee—Subcommittee on Emerging Threats and Capabilities

**Jan. 24:** *U.S. Defense Budget for Fiscal Year 2018*  
**Dakota Wood** before the Senate Armed Services Committee

**Feb. 1:** *Next Steps in the "Special Relationship": Impact of a U.S.-U.K. Free Trade Agreement*  
**Dr. Nile Gardiner** before the House Foreign Affairs Committee—Subcommittee on Terrorism, Nonproliferation, and Trade; Subcommittee on Europe, Eurasia, and Emerging Threats

**Feb. 24:** *The Future of Counterterrorism: Addressing the Evolving Threat to Domestic Security*  
**Robin Simcox** before the House Homeland Security Committee—Subcommittee on Counterterrorism and Intelligence

**Feb. 28:** *China's "Core" Maritime Interests: Security and Economic Factors*  
**Dean Cheng** before the House Foreign Affairs Committee—Subcommittee on Asia

**March 21:** *Sisyphian Diplomacy: The Dangers of Premature Negotiations with North Korea*  
**Bruce Klingner** before the House Committee on Foreign Affairs—Subcommittee on Asia and the Pacific

**April 26:** *Information Dominance: The Importance of Information and Outer Space in Chinese Thinking*  
**Dean Cheng** before the House Foreign Affairs Committee—Subcommittee on Asia and the Pacific

**May 17:** *Southeast Asia: The Need for Economic Statecraft*  
**Walter Lohman** before the House Committee on Foreign Affairs—Subcommittee on Asia and the Pacific

**July 25:** *Maximum Pressure and Engagement—Still Pulling Punches on U.S. Policy Toward North Korea*

**Bruce Klingner** before the Senate Foreign Relations Committee—Subcommittee on East Asia, the Pacific, and International Cybersecurity

**July 26:** *South Sudan's Conflict and Famine*  
**Joshua Meservey** before the Senate Foreign Affairs Committee—Subcommittee on Africa and Global Health Policy

**Sept. 13:** *Time for Shock and Awe Sanctions on North Korea*  
**Bruce Klingner** before the House Committee on Financial Services—Subcommittee on Monetary Policy

**Sept. 14:** *North Korea's Perpetual Provocations: Another Dangerous, Escalatory Nuclear Test*  
**Bruce Klingner** before the House Committee on Foreign Affairs—Subcommittee on Asia and the Pacific

**Sept. 14:** *Staying Ahead of the Islamist Terrorist Threat: Assessing Future Domestic Counterterrorism Measures*  
**David Inserra** before the House Committee on Oversight and Government Reform—Subcommittee on National Security

**Nov. 30:** *Recommendations for a Future National Defense Strategy*  
**Thomas Spoehr** before the Senate Armed Services Committee

**Dec. 6:** *Brexit: A Negotiation Update*  
**Dr. Nile Gardiner** before the House Foreign Affairs Committee—Subcommittee on Europe, Eurasia, and Emerging Threats

**Dec. 12:** *Cambodia: A Democracy in Peril*  
**Olivia Enos** before the House Foreign Affairs Committee—Subcommittee on Asia and the Pacific

Today, however, Beijing and Pyongyang are meeting resistance—the kind of resistance recommended by Heritage.

Dean Cheng, a senior research fellow in our Asian Studies Center, testified twice before Congress on China's military build-up, its space and cyber-warfare programs, and its theft of American technology and intellectual property. His

cool-headed analyses helped convince lawmakers to require a greater U.S. military presence in the Asian-Pacific.

He also helped convince the administration to push back against Chinese pressure to abandon our commitments to Taiwan. In June, the State Department announced it would make \$1.42 billion worth of arms available to Taiwan.



*Ana Rosa Quintana, senior policy analyst in our Allison Center for Foreign Policy Studies, discusses U.S.-Mexico relations with David Asman on Fox Business, Feb. 22.*

And during his November trip to Asia, President Trump announced he would continue to sell arms to the Taiwanese.

Sen. Ted Cruz, R-Texas, relied on the research and analysis of Senior Research Fellow Bruce Klingner to develop his proposal to put North Korea back on the list of State Sponsors of Terrorism. By year's end, not only was Pyongyang listed, but President Trump had issued an Executive Order giving the Treasury Department new authority to go after people and companies that do business with North Korea.

All of these Heritage-backed initiatives aim to stifle foreign entities' willingness to do business with Kim Jong-un's rogue regime, hampering Pyongyang's ability to pursue its nuclear program and other illegal activities.

### Reducing Chaos in the Middle East

When the Obama administration dismissed the Islamic State as a "JV Team," Heritage cautioned that the terror network should be taken seriously. They largely ignored our advice, but the Trump administration took it to heart.

The new president accelerated the pace of airstrikes and gave commanders in the field more freedom to take action. In less than nine months, the "caliphate" was no more and ISIS was destroyed as a military power. That produced a wonderful ripple effect: 2017 logged the first big downturn in global terrorism since 2010.

In October, President Trump "decertified" the Iran nuclear agreement—a deal premised on misinformation and wishful thinking. Heritage, opposed to the pact from the start, rigorously documented Iran's failure to keep its side of the bargain: its continuing effort to acquire nuclear and missile



*On Dec. 12, Olivia Enos, a policy analyst in our Asian Studies Center, tell members of the House Subcommittee on Asia and the Pacific about human rights abuses in Cambodia.*

technology; its refusal to allow inspections of its military bases; and its repeated defiance of UN Security Council resolutions on arms imports and exports.

### Diplomacy with Accountability

"Nervous State Department workers prepare for major restructuring." That April 9 article in *Politico* reported that career State Department staff were poring through a backgrounder by Heritage's Brett Schaefer to figure out where the cuts would come. Trump transition aides were "enamored" of Schaefer's "How to Make the State Department More Effective at Implementing U.S. Foreign Policy," a former senior official at State complained to *Politico*.

One of the major reforms recommended by Schaefer—and subsequently implemented—was elimination of several special State Department "czars" or "envoys" dedicated to specific global issues such as women's rights or health care. All too often, such appointments had muddied the diplomatic waters, leaving both U.S. and foreign officials confused as to the relative importance of various U.S. foreign policy interests and with whom they should be dealing.

Schaefer notched another win on Oct. 12, when the administration announced that the U.S. would withdraw from UNESCO. Schaefer has led Heritage's campaign to get the U.S. out of the organization since 2012.

The State Department cited three key reasons for withdrawing its support: non-payment of dues by many UNESCO members; the organization's "anti-Israel bias;" and its continuing "need for fundamental reform." Schaefer's research, commentaries, and media interviews had highlighted precisely those three problems—over and over—for five years. 📌



## *Paul J. Larkin Jr.*

Senior Legal Research Fellow in the Edwin Meese III Center for Legal and Judicial Studies

# The Institute for Constitutional Government

In courtrooms and law libraries, Paul J. Larkin Jr. is a legal phenomenon. After fighting organized crime and racketeering as a trial attorney in the Reagan administration’s Justice Department, he became an assistant to the solicitor general and argued 27 cases before the U.S. Supreme Court.

Since coming to our Edwin Meese III Center for Legal and Judicial Studies in 2011, Larkin has channeled that courtroom energy into scholarly research and writing. He published seven major law review articles in 2017 alone. To put that in context, the typical law-school faculty member manages one such article per year—two or three if they’re *really* productive.

Larkin’s output is extraordinary in its quality as well as its volume. As Law Professor Mark Osler observed, “Larkin leads rather than follows. His work often begins conversations that go on among the rest of us, and that leadership role is invaluable.”

In 2017, Larkin’s leadership was most visible in the campaign to revive the Congressional Review Act—the statute that

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## Tracking Voter Fraud



The Left insists that voter fraud is virtually non-existent. [Heritage.org/voterfraud](https://www.heritage.org/voterfraud), Heritage's Voter Fraud Database, proves them wrong.

Heritage continued to track down examples of proven voter fraud in the U.S. throughout 2017. At year's end, the database contained over 1,100 documented incidents of voter fraud committed in 47 states.

Our database has received significant media coverage, and WhiteHouse.gov linked to it as part of the administration's initiative to assure election integrity. More importantly, it has been cited in court opinions and amicus briefs as proof that voter fraud exists and must be taken seriously.

Our Election Integrity Initiative also picked up welcome support from the Trump administration. His Justice Department reversed course on challenges

to two state laws: a Texas voter ID law and an Ohio statute that authorizes the state to purge voter rolls of people who haven't cast ballots in the last two elections and don't respond to requests asking them to confirm their registration. The U.S. Supreme Court will hear the Ohio case in 2018.



enables Congress, by majority vote, to reject rules created by federal regulatory agencies. The law was great in theory. But since Congress passed it more than 20 years ago, lawmakers had exercised their power to overturn bad rules precisely once.

Determined to change that, Larkin wrote two Legal Memoranda—"The Reach of the Congressional Review Act" and "Judicial Review Under the Congressional Review Act." Widely circulated on the Hill, these papers proved highly influential.

Larkin argued that, in many cases the Obama administration had failed to meet notification requirements established in the act. It meant that Congress could overrule regulations and "guidance" letters going back to 2009. *The Wall Street Journal* called Larkin's revelations "a regulatory game changer."

Larkin followed up his research with personal briefings for Office of Management and Budget officials (including Director Mick Mulvaney), as well as senior staffers to Senate Majority Leader Mitch McConnell, R-Ky. The goal was to help them make the most of the law, and "make the most" they did.

By mid-May, Congress had used the law to roll back 14 Obama-era rules, saving American families and businesses billions of dollars.

### Ending the Social Justice Slush Fund

Deregulation was not the only issue where our Meese Center experts won success. Three years ago, the Justice Department

and Bank of America settled a case over the latter's mortgage-lending practices. As part of the settlement, the bank was directed to pay \$100 million to various "progressive" activist groups—none of which had been harmed by the bank's lending.

Diverting settlement funds to favored left-wing organizations rather than injured parties or the federal treasury was commonplace under the Obama administration. Heritage objected strenuously to this abusive practice, arguing that the Executive Branch should not be allowed to use its legal muscle to shake down corporations and bankroll its political allies.

The new administration saw things our way. On June 5, Attorney General Jeff Sessions issued a memo prohibiting U.S. attorneys from including unrelated third-party payouts in any settlement. The Justice Department's "slush fund for fellow travelers" was cut off.

### Breaking up the Judicial Appointment Logjam

President Trump did an admirable job of nominating conservative judges to open seats on the federal bench. (See *Restoring Constitutionalism in the Federal Judiciary*, p. 21.). But the number of vacancies actually increased during 2017. That's because liberals flagrantly abused a little-known, 100-year-old Senate convention: the "blue-slip" process.

By tradition, after receiving notice of a judicial nomination, the chairman of the Judiciary Committee sends senators from the nominee's home-state a blue slip for them to indicate their

## 2017 Testimonies by Scholars in the Meese Center



- May 19:** *Collateral Consequences of Felony Convictions—Felon Voting*  
**Hans von Spakovsky** before the U.S. Commission on Civil Rights
- 
- May 19:** *Collateral Consequences: Protecting Public Safety or Encouraging Recidivism?*  
**John G. Malcolm** before the U.S. Commission on Civil Rights
- 
- June 8:** *A Time to Reform: Oversight of the Activities of the Justice Department’s Civil, Tax and Environment and Natural Resources Divisions and the U.S. Trustee Program*  
**Hans von Spakovsky** before the House Judiciary Committee—Subcommittee on Regulatory Reform, Commercial and Antitrust Law
- 
- June 29:** *The Report and Recommendations of the International Competition Policy Expert Group*  
**Alden F. Abbott** before the House Judiciary Committee—Subcommittee on Regulatory Reform, Commercial and Antitrust Law
- 
- July 27:** *Antitrust Concerns and the FDA Approval Process*  
**Alden F. Abbott** before the House Judiciary Committee—Subcommittee on Regulatory Reform, Commercial and Antitrust Law
- 
- Sept. 12:** *The Heritage Foundation’s Election Fraud Database*  
**Hans von Spakovsky** before the Presidential Advisory Commission on Election Integrity
- 
- Sept. 28:** *Rulemakers Must Follow the Rules, Too: Oversight of the Agency Compliance with the Congressional Review Act*  
**Paul J. Larkin Jr.**, before the House Judiciary Committee—Subcommittee on Regulatory Reform, Commercial and Antitrust Law
- 
- Nov. 30:** *The Role and Impact of Nationwide Injunctions by District Courts*  
**Hans von Spakovsky** before the House Judiciary Committee—Subcommittee on Courts, Intellectual Property and the Internet



*Heritage Legal Fellow Elizabeth Slattery joins three other legal scholars—Michael Carvin, C. Boyden Gray, and Ed Whelan—for a C-SPAN-televised discussion of the qualifications and past rulings of then-nominee Supreme Court Justice Neil Gorsuch.*

approval of the choice. But “progressive” senators refused to return their slips to the chairman, leaving the next step of the process—confirmation hearings—in limbo. What started as a courtesy was being used to blackball constitutionalist nominees.

Meese Center advocates spoke out against this obstructionism, urging the chairman to reform the process. The committee responded with a new, improved rule. The blue-slip process still allows home-state senators to indicate how they will vote on a nomination, but confirmation hearings can go forward with or without their feedback. No longer can a single senator wield veto power over a presidential nomination.

### Advancing Legal Training and Education

The Meese Center organizes a variety of educational programs. Running through them all is a common thread: the desire to restore the courts to their constitutional role of protecting individual liberty and restraining illegal government action.

To this end, Legal Fellow Elizabeth Slattery, manager of our Appellate Advocacy Program, hosted 12 moot court sessions in 2017. These “dry run” exercises help conservative advocates shape and refine the oral arguments they present in important cases before the U.S. Supreme Court and U.S. Courts of Appeals. Slattery also organized amicus conferences to coordinate friend-of-the-court briefs filed by dozens of conservative legal foundations and activists in 20 significant federal cases.

In May, the Meese Center hosted 43 CEOs from the freedom-based public interest legal movement at its Spring Legal Strategy Forum in Colorado Springs. Highlights included

keynote addresses by First Amendment expert Floyd Abrams, the Claremont Institute's Charles Kesler, and Chief Judge Timothy Tymkovich of the 10th Circuit, as well as workshops on legal issues pertaining to energy, the environment, and property rights.

At our Fall Legal Strategy Forum, a former U.S. attorney general—Heritage's Edwin Meese III—introduced the current attorney general, Jeff Sessions. The latter spoke about the need to defend constitutional rights, particularly those regarding religious liberty and freedom of speech. The 47 CEOs attending also heard from Labor Secretary Alex Acosta and D.C. Circuit Judge Brett Kavanaugh, who delivered the 10<sup>th</sup> Annual Joseph Story Distinguished Lecture.

The center's eighth annual "Preserve the Constitution" lecture series ran from September to early November. It included a Constitution Day address by Deputy U.S. Attorney General Rod Rosenstein, a Supreme Court preview featuring former U.S. Solicitor General Paul Clement, and a spirited debate on the constitutionality of the president's immigration order. The series culminated with a keynote address by Neomi Rao on how to roll back the administrative

state. It was her first official address since being confirmed as head of the White House Office of Information and Regulatory Affairs.

Day-long conferences convened by Meese Center scholars included:

- a drug policy roundtable at which law enforcement officials, medical and behavioral experts, and administration officials discussed how best to address the opioid crisis as well as problems arising from the spread of marijuana legalization.
- an Edwin Meese III-led summit meeting, of police chiefs and criminologists from across the country to discuss the current state of policing. Growing out of that meeting was a Heritage Special Report, "Policing in America: Lessons from the Past, Opportunities for the Future."
- a criminal law symposium, co-hosted by the University of California Berkeley School of Law, attracting over 20 top scholars to address topics such as police and race relations and criminal justice reform. Papers presented at the meeting will be published in the *Berkeley Journal of Criminal Law* in 2018. 📖

## Restoring Constitutionalism in the Federal Judiciary



It was a huge victory, more than a year in the making. The confirmation of Neil Gorsuch as Antonin Scalia's successor on the Supreme Court began way back in March 2016. That's when **John Malcolm**, director of our Meese Center for Legal and Judicial Studies, compiled and published a list of jurists most qualified to sit on the bench of the highest court in the land.

The idea for publishing the list arose after a series of meetings with people running for office that year. Heritage experts are always willing to brief candidates on a variety of issues. It's a great way to promote our conservative policy recommendations.

By March, we had already had many such meetings with people running at all levels of government—from

state legislative posts up to the presidency. In conversations with senate and presidential candidates, the issue of judicial nominations invariably came up. So Malcolm set to work preparing his list.

Ten months later, *Politico* profiled him as "The Man Who Picked the Next Supreme Court Justice."

And what a pick it was! In his first six weeks on the Court, Justice Gorsuch acted in defense of federalism, property rights, and religious liberty. It was just what Malcolm and his colleagues had in mind: a principled jurist who believes in an originalist interpretation of the Constitution—and he's there for life.

Names from Malcolm's list kept cropping up in President Trump's

lower court appointments, too. In fact, he had to keep adding names, to replace those now seated on appellate courts throughout the land.

By mid-year, liberal Sen. Chris Coons, D-Del., was wringing his hands over what he saw happening to the federal bench. "Given their youth and conservatism," Coons lamented, these new judges will "have a significant impact on the shape and trajectory of American law for decades."

In all, 19 judicial nominees were confirmed—14 of them to federal circuit courts, a record high for the first year of a new presidency. The balance of the courts is now tipping away from "progressive" judicial activism and back toward the Constitution.

## The Simon Center: Exposing the Roots of Leftist Argumentation

Heritage's B. Kenneth Simon Center for Principles and Politics has long been known for its expertise in explaining the founding principles of our nation. In recent years, it has opened up a second and equally valuable line of inquiry: explicating the intellectual underpinnings of modern "movements" of the Left.

A key player in this effort has been Boise State University Professor Scott Yenor. In June of 2017, the Simon Center published a First Principles essay that Dr. Yenor had researched as our 2015-2016 visiting fellow in American political thought. The essay, "Sex, Gender and the Origin of the Culture Wars," traced the intellectual history of the Left's latest *cause célèbre*: transgender rights.

Yenor established a direct link between Simone de Beauvoir and other radical feminist theorists of the 1950s, '60s, and '70s, and today's transgender activists. Both movements, he noted, insist that gender is a mere social construct and can be completely untethered from genetics.

The research was impeccable and attracted little criticism until the Simon Center launched Phase 2: broadly marketing the implications of his research to the general public. It began with Yenor's plain-spoken article in *The Daily Signal*, "How Radical Feminism Sowed the Seeds of Our Transgender Moment."

"Today's transgender movement is the latest effort to overturn what are in fact true assumptions about human life," the article proclaimed. Yenor also noted that the movement



insists society do more than simply tolerate transgenderism: "The public must come to affirm these gender performances as admirable, healthy, and authentic."

The piece sparked thoughtful discussion in some quarters. On Yenor's campus, it sparked outrage. Within days, the school's director of student diversity and inclusion accused Yenor of propagating "fear fueled conspiratorial theories"; flyers screaming "YOU HAVE BLOOD ON YOUR HANDS SCOTT YENOR" papered the quad; and progressive students and faculty members were calling for him to be fired.

It was, in the words of *The Weekly Standard's* Ben Shapiro, a full-fledged "witch hunt." And it couldn't have worked out better. The Left's response was so irrational, it became a national story. Yenor's appearance on Tucker Carlson's Fox News show so clearly exposed the Left's Orwellian effort to stamp out free speech and academic inquiry, it altered the tone of the national debate surrounding transgenderism and free speech on campus.

### The Simon Center's Top 10 Publications for 2017



**First Principles Series** *The Progressive Movement and the Transformation of American Politics*, **Dr. Thomas West**  
*Sex, Gender, and the Origins of the Culture Wars: An Intellectual History*, **Dr. Scott Yenor**  
*Can the State Be Neutral on Marriage?* **Dr. Scott Yenor**  
*The Limits and Dangers of Civil Disobedience*, **Dr. Peter Myers**

**Special Report** *From Natural Rights to Human Rights—And Beyond*, **Dr. Peter Myers**

**Lectures** *Populism and the Future of Democracy*, **Roger Kimball**  
*Pray for Chekov: Or What Russian Literature Can Teach Conservatives*, **Dr. Gary Saul Morson**

**Essays** *The Mind of Black Lives Matter*, **Dr. Peter Myers in National Affairs**  
*America Divided*, **Dr. David Azerrad's three-part series in The American Spectator**  
*Civility and Rebarbarization*, **Arthur Milikh in National Affairs**



Graduates of the Heritage Congressional Fellowship program, Sept. 25.

As the year drew to a close, Yenor's teaching post was secure; Idaho lawmakers were preparing to cut funding for Boise State, and "Sex, Gender, and the Origin of the Culture Wars" ranked as Heritage's third most widely read essay of 2017.

### Publishing with a Purpose

Yenor was not the only Simon Center-sponsored scholar to make a splash in 2017. Black Lives Matter has become the most powerful and virulent social movement on the left. Its exaggerated claims about police brutality have received critical scrutiny. But Dr. Peter Myers, the Simon Center's visiting fellow in American political thought for the 2016-2017 academic year, took a deeper look. The result: a widely discussed article, "The Mind of Black Lives Matter," in *National Affairs*.

It was the first full-length exploration of the intellectual theory underpinning the BLM movement. Myers, a political science professor at the University of Wisconsin—Eau Claire, exposed the group's radical claims and criticized them from the perspective of America's two greatest civil rights leaders: Frederick Douglass and Martin Luther King, Jr.

Dr. Carson Holloway, our visiting fellow in American political thought during the 2014-15 academic year, produced *The Political Writings of Alexander Hamilton*, a two-volume edition published by Cambridge University Press. Dr. Michael Zuckert, editor of the journal *American Political Thought*, praised the work as "a major contribution to the study and appreciation of the tradition of American political thought."

Dr. Thomas West's First Principles essay on "The Progressive Movement and the Transformation of American Politics" was the most downloaded of all Heritage Foundation publications in 2017.

### Making Congressional Staff More Conservative

This year, 55 congressional staffers graduated from the Heritage Congressional Fellowship program. The year-long

program, run jointly by the Simon Center and the Policy Promotion team, is the only one of its kind on the Hill: it teaches first principles, conservative policy and congressional procedure to junior-level Senate and House staff.

The curriculum, designed by the Simon Center staff, features speakers from Heritage and other leading conservative organizations and includes a day-long trip to Mount Vernon.

"It's a great opportunity to learn conservative principles and policies," says Steve Chartan, legislative director for Sen. Ted Cruz, R-Texas. "Participating in Heritage's Congressional Fellowship gives Hill staffers the tools they need to promote conservative policy solutions that will improve the lives of all Americans."

### Teaching First Principles to the Next Generation

This year, almost 200 Heritage Foundation interns (who come from over 120 universities around the country) will complete the First Principles seminar. The weekly lecture series explores the principles that animated the Founding Fathers and drive conservatism today.

Simon Center scholars lead classes that cover America's founding documents (the Declaration of Independence and the Constitution) as well as modern liberalism, libertarianism and conservatism. In spirited group discussions, interns are encouraged to apply these principles as they think through thorny questions related to marriage, race, religion, foreign policy and the economy.

Interns consistently rank the seminars as a favorite part of their internship. "As someone who attends an incredibly liberal state university," explains Emily Walsher of the University of Florida, "I am only offered a single perspective in my college courses, and it's not an unbiased one. The First Principles lecture has equipped me with the philosophy and ideas to be able to better understand who I am as a conservative." 🗣️



## *Adam N. Michel*

Policy Analyst in our Thomas A. Roe Institute for Economic Policy Studies

# Institute for Economic Freedom and Opportunity

As Congress and the White House prepared to tackle a much-needed overhaul of the federal tax code, Heritage assembled a world-class tax policy team. Our first acquisition: Adam N. Michel.

Michel had been managing research for the Spending and Budget Initiative at the Mercatus Center at George Mason University. It was interesting work, but Michel found himself itching to get more involved in policy analysis and development.

He found that opportunity at Heritage.

Within months, Michel was not only turning out analytical Issue Briefs and Backgrounders, he was moderating panels populated by the likes of Senate Budget Committee member David Perdue, R-Ga., and Republican Study Committee Chairman Mark Walker, R-N.C. The chance to personally question, probe and interact with legislative policymakers was exactly what the 28-year-old Michel had wanted.

DAVID HILLS

Next to join the Heritage Tax Team: Parker Sheppard. He set to work in our Center for Data Analysis, designing a world-class dynamic analysis model capable of showing the full economic effects of changes in tax policy. Previously, our analysts had had to rely on tax models—each with its peculiar problems and shortcomings—programmed by other organizations.

Michel and Sheppard joined the rest of Heritage’s tax policy dream team—David Burton, Rachel Greszler, and Kevin Dayaratna—at just the right moment. In addition to providing “big picture” policy analyses, they were able to provide hard numbers to inform the debate in Congress. Those numbers dispelled the misleading talking points of tax reform opponents and helped Americans understand the true benefits of pro-growth tax reform.

Visiting Distinguished Fellow Stephen Moore, an informal White House advisor, continuously pressed for pro-growth reforms, insisting on lower rates for individuals and corporations, a territorial tax system to level the playing field for American businesses competing abroad, and an end to the tax code’s built-in cronyism.

And, as the tax reform debate wore on, it became clear that policymakers were listening to what our team had to say. Take the issue of a Border Adjustment Tax (BAT), for example. Lawmakers looking for a way to offset “revenue losses” created by tax cuts, latched on the notion of imposing a BAT. As the idea picked up steam, Michel responded with a paper presenting Heritage’s objections to this economically risky proposition. The idea quickly fell out of favor as a viable component of tax reform.

By fall, Heritage had assumed a central role in the conversation. We hosted numerous lectures and seminars featuring key policymakers such as House Speaker Paul Ryan, Ways and Means Committee Chairman Kevin Brady, R-Texas, and Kevin Hassett, chairman of the President’s Council of Economic Advisors. C-SPAN carried three of these events live.

Meanwhile, our Media Relations team was furiously booking interviews—nearly 200 national radio and TV news programs and scores more with major publications such as *The New York Times*, *The Washington Post*, *The Wall Street Journal*, *USA Today*, *Bloomberg*, and *Politico*. Commentaries by Michel, Moore and other Heritage tax experts appeared in 45 major print outlets.

As the debate reached its peak, Heritage’s Policy Promotion staff delivered *Getting to Tax Reform: The Facts, Principles, and Messaging for Fundamental Reform* to every office on Capitol Hill. The 230-page compilation of Heritage research

and commentary helped guide lawmakers during the final drive to a pro-growth tax code.

With Heritage leading the conversation on tax reform, it was fitting that President Trump should join us for our annual President’s Club Meeting. His stirring speech before more than 1,000 Heritage members and friends reiterated his promise to deliver tax reform by Christmas.

That pledge, broadcast live by Fox News and CNN, echoed across the country. Two months later, President Trump made good on his promise, signing the most significant tax reform in over 30 years into law three days before Christmas.

## How Trump’s “Skinny Budget” Took Shape



We’ll let *The Washington Post* set the stage:

*Up against the clock and with many senior staff positions still vacant, President Trump’s Office of Management and Budget turned to one of the nation’s most conservative think tanks—The Heritage Foundation—for inspiration.*

*The result: The Trump budget proposal released last week bears a striking resemblance to The Heritage Foundation’s Blueprint for Balance: A Federal Budget for 2017, complete with a list of deep spending cuts designed to scale back the size and scope of the federal government.*

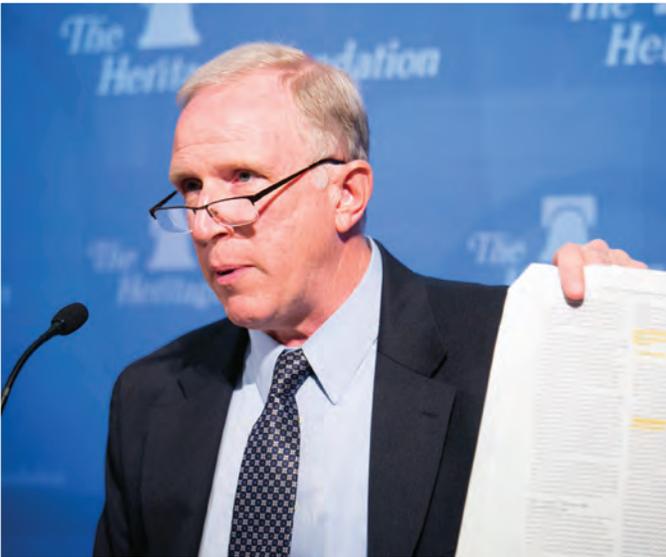
—Steven Mufson, “Trump’s budget owes a huge debt to this right-wing Washington Think Tank,”  
March 27, 2017

Heritage’s *Blueprint for Balance* was a 165-page proposal to wipe out the deficit in 10 years or less. *Politico* called its proposals to limit entitlement as well as discretionary spending, “a wakeup call for the president at the height of budget season.”

Its lead author was Paul Winfree, director of our Roe Institute for Economic Policy Studies. But shortly after putting the final touches to *Blueprint*, Winfree left for a new position: deputy director of President Trump’s Domestic Policy Council and White House director of budget policy.

It was the place to be for someone seeking to alter the course of federal spending.

“People are policy,” they say. And in 2017, conservative people and policies were in position to advance.



*Dr. David Kreutzer returned to Heritage after a brief but productive stint at the Environmental Protection Agency, where he helped rescind many costly “technical directives” issued by the Obama administration.*

While the tax bill was not perfect, it was very good. As Michel says, “We got more than half a loaf [on expensing], and we’ll be back for more in 2018.” It’s worth remembering that President Reagan did tax reform in two rounds. In 2018, Heritage will be back in the ring for Round 2, pressing to expand the gains won in the Tax Cuts and Jobs Act.

### Restoring Reason to Environmental Policy

Tax reform wasn’t the only thing on the plate for analysts in our Roe Institute for Economic Policy Studies. Our Energy and Environment team worked hard and got results as well.

At a June 1 Rose Garden ceremony, President Trump announced he would withdraw the U.S. from the unworkable—and hugely expensive—Paris Climate Accord. He cited

Heritage’s analysis of the pact’s economic impact as a key factor behind the decision. That was gratifying for several Heritage staff members in attendance—who promptly returned to the office to work on their next campaign: extricating the U.S. from the even more onerous United Nations Framework Convention on Climate Change.

Progress also was made in dismantling the Obama Administration’s Clean Power Plan. Heritage research provided the intellectual foundation for the rollback, and Heritage people pushed it through.

One key player was Dr. David Kreutzer. He left our Center of Data Analysis for a post in the Environmental Protection Agency. *The Washington Post* subsequently credited him with playing “an important role shaping and writing” the President’s Executive Order that dismantled a White House working group on “the social cost of carbon” and rescinded numerous related technical directives from the Obama era.

That order essentially dismissed the assumptions used by Obama’s EPA to justify extremely expensive carbon-reduction regulations. The *Post* called it “a big victory for Kreutzer.” His work done at EPA, Kreutzer returned to Heritage in April.

*Farms and Free Enterprise*, a 129-page report from our Mandate for Leadership series, presented cogent arguments that helped convince President Trump to issue an Executive Order withdrawing the Obama-era “Waters of the United States” rule. Both vague and subjective, that rule had greatly expanded the reach of the EPA and the Army Corps of Engineers, trampling on property rights and ignoring the role of states and communities.

The EPA also formally ended the use of “sue and settle,” a favored approach for extreme environmental groups to influence regulatory agendas without public knowledge. These



In January, the University of Pennsylvania’s “Global Go To Think Tank Index Report” named **Michael Sargent’s** “Building on Victory: An Infrastructure Agenda for the New Administration” one of the 50 best think tank reports worldwide.

Sargent continued to shape the debate around infrastructure investment through briefings for senior administration officials, meetings with lawmakers, and engagement with the media. And with former Distinguished Fellow Elaine Chao now running the Transportation Department, this will doubtless be one of the most influential papers of 2018.

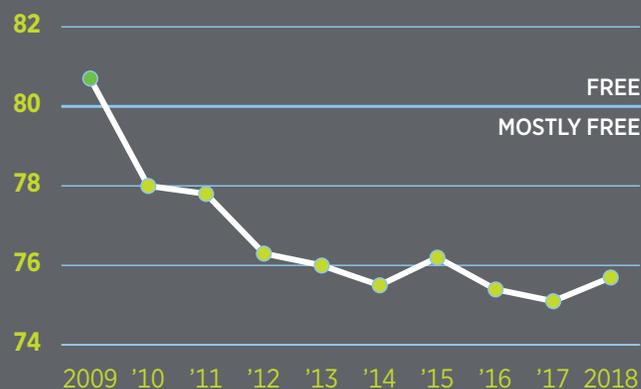
DAVID HILLS, PAUL MORSE



The 2017 *Index of Economic Freedom* contained good news and bad news. Globally, economic freedom was greater than ever. But in the U.S., it declined for the third straight year—and the ninth time in the last 10 years.

The *Index* has become a standard reference work for students of business and economics, investment houses and government policymakers around the globe. And it remains Heritage's most popular research product. In 2017, the online version received nearly **8.5 million** views and was downloaded in its entirety more than **60,000** times.

## UNITED STATES: INDEX OF ECONOMIC FREEDOM



## 2017 Testimonies by Scholars in the Institute for Economic Freedom and Opportunity



- |  |  |
|--|--|
| <p><b>Feb. 15:</b> <i>The Tax Code as a Barrier to Entrepreneurship</i><br/><b>David Burton</b> before the House Small Business Committee</p>  | <p><b>July 25:</b> <i>Examining U.S. Biofuels Policy</i><br/><b>Nicolas Loris</b> before the House Committee on Science, Space and Technology—Subcommittee on Energy and Subcommittee on Environment</p>   |
| <p><b>March 1:</b> <i>Examining Environmental Barriers to Infrastructure Development</i><br/><b>Nicolas Loris</b> before the House Committee on Oversight and Government Reform—Subcommittee on the Interior, Energy and the Environment and Subcommittee on Intergovernmental Affairs</p> | <p><b>Sept. 13:</b> <i>Recommendations for Government Reorganization and Lessons from Past Reorganization Efforts</i><br/><b>Rachel Greszler</b> before the Senate Homeland Security and Government Affairs Committee</p>                                      |
| <p><b>April 6:</b> <i>Opportunities to Reform the Federal Financial Regulatory System</i><br/><b>Dr. Norbert J. Michel</b> before the House Financial Services Committee—Subcommittee on Financial Institutions and Consumer Credit</p>  | <p><b>Oct. 24:</b> <i>Regulatory Reform Task Forces Check-In</i><br/><b>Diane Katz</b> before the House Oversight and Government Reform Committee—Subcommittee on Government Operations and Subcommittee on Healthcare, Benefits, and Administrative Rules</p> |
| <p><b>April 26:</b> <i>Regulatory Reforms to Create Hope and Opportunity for Investors, Consumers, and Entrepreneurs</i><br/><b>Dr. Norbert J. Michel</b> before the House Financial Services Committee—Subcommittee on Monetary Policy and Trade</p>                                      | <p><b>Sept. 26:</b> <i>Examining America's Nuclear Waste Management and Storage</i><br/><b>Katie Tubb</b> before the House Oversight and Government Reform Committee—Subcommittee on the Interior, Energy, and the Environment</p>                             |
| <p><b>May 18:</b> <i>Federal Employee Compensation: An Update</i><br/><b>Rachel Greszler</b> before the House Committee on Oversight and Government Reform</p>   | <p><b>Dec. 7:</b> <i>Transforming the Department of the Interior for the 21st Century</i><br/><b>Nicolas Loris</b> before the House Natural Resources Committee—Subcommittee on Oversight and Investigations</p>   |
| <p><b>June 28:</b> <i>Main Street Needs Monetary Policy Reform More than Wall Street Does</i><br/><b>Dr. Norbert J. Michel</b> before the House Financial Services Committee—Subcommittee on Monetary Policy and Trade</p>   |  |



*For his tireless work on the front lines of the repeal Dodd-Frank movement, CQ Roll Call named Dr. Norbert Michel a “Rising Star of 2017”—one of seven “advocates to watch.”*

groups have used out-of-court settlements to skirt normal rules of the regulatory process and to influence the scope and pace of environmental regulations. Heritage analysts had long urged an end to such backroom dealings.

On the energy front, the president and Congress began unwinding burdensome restrictions on access to abundant energy resources almost immediately. The administration okayed the long-delayed construction of the Dakota Access and Keystone XL pipelines. It also opened up huge tracts of federal lands and offshore locations to energy exploration and production. Heritage had advocated all of these actions for years.

### Undoing Over-regulation

The Trump administration withdrew or delayed 1,500 proposed regulations. One of its most controversial actions was reversal of the FCC’s “net neutrality” rule. That rule required broadband networks to treat all communications and all customers alike—no discounts, no priority-service plans, no exceptions.

Under the guise of “fairness,” the rule stifled competition among broadband providers and all but eliminated innovation

in the industry. As usual, this “consumer protection” measure wound up hurting consumers.

Senior Research Fellow James Gattuso had argued vociferously against net neutrality since it was first proposed. It was fitting, then, that FCC Chairman Ajit Pai chose Heritage as the place from which to release his draft decision repealing the rule.

In another promising development, the House passed a bill that would actually do what liberals said the Dodd-Frank Wall Street Reform and Consumer Protection Act would do: fix what caused the 2008 financial crisis. Reform is needed because Dodd-Frank did nothing to reduce the overregulation that created the crisis or reduce the likelihood that taxpayers would be stuck with the bill for bailing out “too big to fail” financial institutions in the *next* crisis.

The House-passed bill, the Financial CHOICE Act, would create more stable markets. That’s because it incorporates many solidly researched recommendations put together by Dr. Norbert Michel, director of our Center for Data Analysis. In fact, the entire bill represents years of work between Rep. Jeb Hensarling, R-Texas, Heritage, and several allied think tanks. We’ve taken apart Dodd-Frank, title by title, and come up with ways to end “too big to fail” once and for all.

The essence of that work was captured in *The Case Against Dodd-Frank*, a 200+ page critique of the 2010 law. Dr. Michel edited that book, contributing several chapters as well.

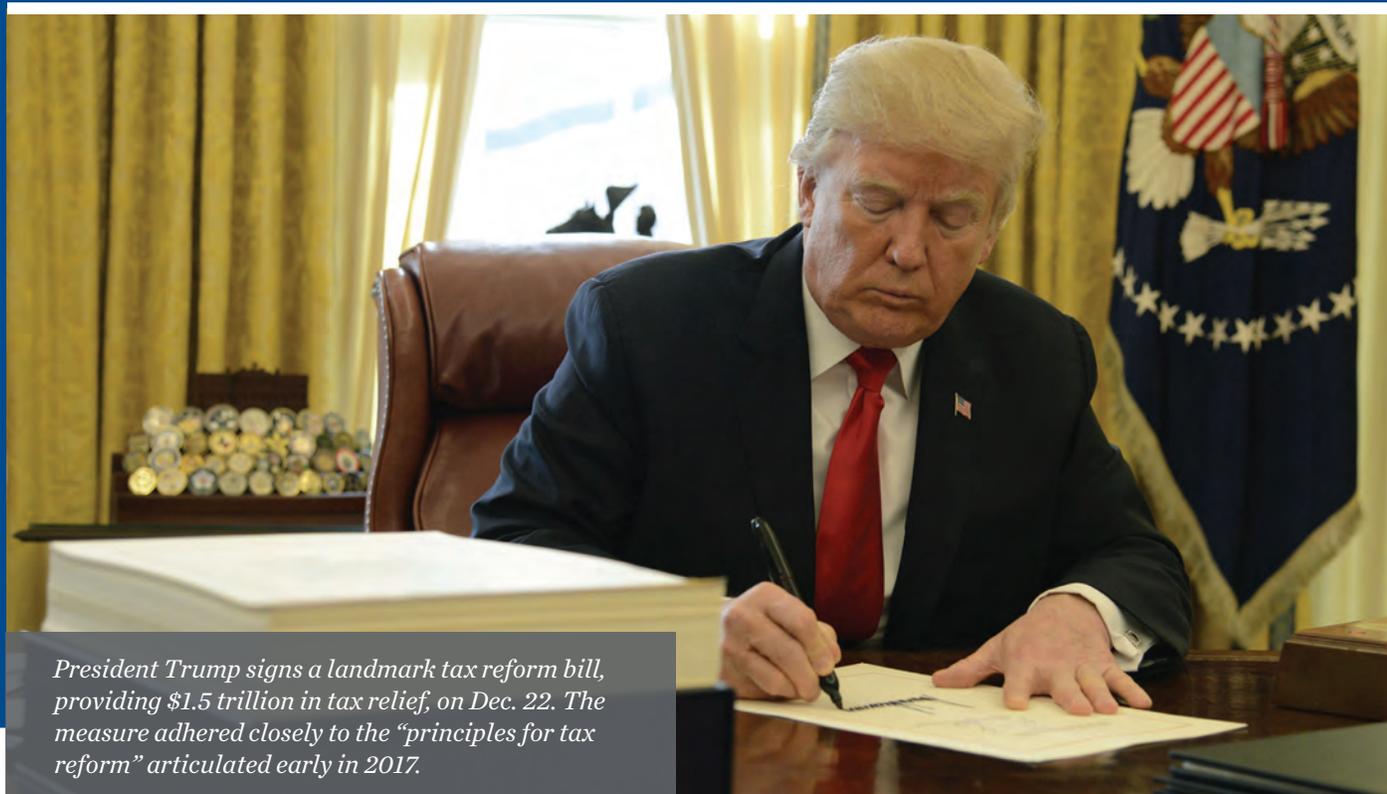
### Government Reorganization Project

In February, President Trump issued an Executive Order directing federal agencies to come up with their own plans to down-size. But there is little reason to believe that federal agencies are capable of thoroughly honest self-assessments, which is why the president asked Heritage to develop a benchmark plan he could use to judge the plans coming from the various agencies.

In June, Heritage delivered exactly that. *Blueprint for Reorganization: An Analysis of Federal Departments and Agencies* spotlights the redundant, wasteful, and inefficient programs of 22 different federal agencies and provides recommendations for either eliminating or combining them. The goal: to give Americans a leaner, more efficient federal government that’s focused more on performing core constitutional missions than on serving special interests.

Armed with these suggestions, Secretary Ryan Zinke initiated a major reorganization of the Department of the Interior. And Heritage-inspired reorganizations continue apace at the State Department, the Department of Energy, and the National Security Council. 🇺🇸

DAVID HILLS



*President Trump signs a landmark tax reform bill, providing \$1.5 trillion in tax relief, on Dec. 22. The measure adhered closely to the “principles for tax reform” articulated early in 2017.*

Consequential conservative policy victories do not occur spontaneously in any political environment. They arise from years of policy development, followed by careful cultivation of legislative coalitions. The incredible successes of 2017 were possible both because the American people rose up in defiance of the political establishment, cultural elites, and media pundits, and because Heritage Action had put in the time, laying the legislative groundwork.

### Tax Reform

In early August, when almost no one thought tax reform would happen, Heritage Action CEO Michael A. Needham told *Bloomberg TV*: “It will be by the end of the year.” Sure, there were plenty of legitimate reasons for the dominant skepticism. Congressional Republicans had stumbled badly out of the tax-reform gate, proposing a Border Adjustment Tax and suggesting tax reform had to be revenue neutral. Tax reform looked like a non-starter—until Heritage Action helped remove both of those deal-killers.

As the *Washington Examiner* noted, border adjustment tax advocates were holding firm—and the larger reform package going nowhere—until “conservative advocacy groups with grassroots credibility, such as Heritage Action” rallied their activists in opposition. That marked the beginning of the end for that misguided idea. Similarly, the *Examiner*

reported, Heritage Action delivered “a ‘congressional boarding pass’ to Republicans” headed to their annual retreat.” Its message: abandon the concept of revenue-neutral tax reform.

Heritage Action also led the drive to cap the federal SALT (state and local tax) deduction. That reform helped level the playing field for taxpayers in low-tax states, who had been effectively subsidizing tax-and-spend governments elsewhere.

One creative tactic: Heritage Action tapped its grassroots network to line up nearly 150 real estate professionals to sign a letter urging an end to the SALT deduction. (The Left had claimed that capping SALT deductions would “destroy” the real estate market.) Then, on one of his regular “Fox News Sunday” appearances, Needham highlighted the letter and warned that “every single corrupt force of the status quo in

PORTIONS OF THIS PUBLICATION WERE PROVIDED OR RELATE TO, AND WERE PAID FOR BY, HERITAGE ACTION FOR AMERICA.



*As daughter Ella and wife Mary (FAR LEFT) look on, Russell T. Vought, former vice president of Heritage Action, fields questions at a June 7 hearing regarding his nomination to serve as deputy director of the Office of Management and Budget.*

Washington” would be coming out to “protect their little carve out” in the tax code.

Heritage Action was also an early proponent of eliminating the “tax penalty” for individuals who opt to go without coverage rather than purchase over-priced coverage on the Obamacare exchanges. That position was not only good health care policy, it also opened up additional room for tax cuts. Heritage Action was also instrumental in eliminating the so-called “bubble rate” and achieving a major education policy victory with the expansion of 529 educational savings vehicles.

### Supreme Court

On Jan. 21, 2017, President Trump nominated Neil Gorsuch to serve on the U.S. Supreme Court. For Heritage Action, the fight to get a conservative into the court’s open seat had begun a year earlier—even before there was an opening.

A March 2016 *Washington Post* article previewing the looming battle over President Obama’s final Supreme Court nominee, Merrick Garland, noted that Heritage Action had been “laying the groundwork for the current battle” since the beginning of the year, urging conservative senators to block confirmation of several other Obama appointees. Those earlier nominees were confirmed—as Heritage Action expected. But Heritage Action was playing the long game.

“Part of the reason we were so active early on was the thought of, something could happen on the Supreme Court and it would be a defining moment for the Republican Party in how it responded,” Heritage Action’s Dan Holler explained to the *Post* reporter. “It was time to begin framing the debate on judicial nominees.”

And when Senate Republicans did hold the line on the Garland nomination, it made the issue a central theme of the 2016 campaign. That, in turn, produced a mandate for Judge Gorsuch and many other conservative appointments made by President Trump in his first year.

### Deregulation, Finally

The Trump administration’s deregulatory effort has been so far-reaching that The Heritage Foundation was forced to rename its annual “Red Tape Rising” report. In 2017, it became “Red Tape Receding.” Heritage Action pushed for congressional involvement in that process as well, through the use of the Congressional Review Act.

As *The Washington Post* noted, House Republicans were finally “pushing full speed ahead ... encouraged by conservative activist groups” to finally deliver on their deregulatory promises. And none pushed harder than Heritage Action.

It paid off. Congress used the law’s disapproval process 14 times in 2017, whereas it had been used only once in the previous 20 years. And thanks to the provisions of the law, no future administration can reimpose any of those disapproved regulations without prior approval from Congress.

### Staffing Congress and the Administration

The list of former Heritage Action staff holding key positions in Congress and the administration grew throughout the year. Former Vice President Russ Vought was selected to be deputy director of the Office of Management and Budget. He was joined there by two other Heritage Action staffers, one of whom—Jessica Anderson—serves as the agency’s associate director.

Meanwhile, some of our former grassroots managers left in 2017 to take lead roles in 2018 campaigns back home. Wade Miller is a senior official in a Texas Senate race, and Stephen Siao is running a congressional campaign in his home state of Tennessee.

All the while, Heritage Action alumni continued to fill posts on Capitol Hill, among them: chief of staff for Rep. Ron DeSantis, R-Fla.; deputy chief of staff for Rep. Ted Budd, R-N.C.; and legislative directorships for three representatives—Gary Palmer, R-Ala., Dave Brat, R-Va., and Budd.

Other alumni are scattered across various Congressional committees and personal offices. It all deepens Heritage Action’s ever-growing network on Capitol Hill.

### Never Too Late to Get It Right

While 2017 contained once-in-a-generation victories like tax reform, it was not without missed opportunities. Chief

among them was the failure to repeal and replace Obamacare. Heritage Action's laser-like focus on Obamacare's cost-raising regulatory infrastructure brought the issue into focus for the conservative movement and the larger legislative debate.

As expected, Heritage Action made the case everywhere—in the halls of Congress, in the White House, on television, and in print. Ultimately, the House moved to address Heritage Action's concern through an amendment offered by Rep. Mark Meadows, R–N.C. This cleared the way for the Obamacare repeal bill to pass the House with near unanimous support from House conservatives.

The bill failed when Sens. John McCain, R–Ariz., Lisa Murkowski, R–Alaska, and Susan Collins, R–Maine, joined the Democratic caucus' unanimous opposition to repeal. That

didn't mean the fight was over. But it did mean that Heritage Action would take the fight to another arena.

Our future efforts to repeal and replace Obamacare will focus on unburdening states of federal regulations that hobble their ability to adopt innovative, free-market health reforms that can make affordable, high-quality health care available to their citizens.

“The challenge,” as Needham said in late 2017 on “Fox News Sunday,” “is finding a way ... to get the Republican party to congeal around a plan that follows through on promises that they would repeal Obamacare.” Heritage Action remains optimistic as it builds a coalition inside and outside of Congress to return regulatory authority back to the states and control back to the individual. 🗳️

## Tom Balek: Sentinel Strong

Tom Balek is a self-employed real estate investor and musician in Lake Wylie, S.C. For years he had worked closely with Heritage Action. Then, with encouragement from his regional coordinator, James Quarles, Tom decided to take his advocacy role to the next level. He was determined to develop a relationship with his congressional representative, Mick Mulvaney.

After attending a town hall meeting, Tom and Rep. Mulvaney got to know each other on a first-name basis. Soon, they were working together to advance conservative priorities in Congress.

Then came Donald Trump. In early 2017, he nominated Mulvaney to head the Office of Management of Budget. It was a positive move for the country, but it cost the constituents of South Carolina's Fifth District a solidly conservative representative.

It was a personal setback for Tom, as well. But he's not the kind of person to let set-backs stop him.

Taking an active interest in the upcoming special election to replace Mulvaney, Tom quickly developed a relationship with then-candidate Ralph Norman. Within a few months, Norman won a contested primary and the general election to become the new representative of the Fifth District.

Tom continues to be the strong conservative voice in the state, working directly with Rep. Norman to



*Sentinel Ruben Trevino (blue shirt) introduces himself to Rep. Ralph Norman, R–S.C., at Tom Balek's BBQ social.*

advance Heritage priorities and achieve conservative policy victories.

Heritage Action sentinels play many critical roles, and one is building relationships with new members of Congress. Weeks after Rep. Norman took the oath of office, Tom and his wife Linda invited Norman and several members of his staff to their home for a BBQ social to meet with other sentinels and conservative activists in the area.

They were able to hear about Rep. Norman's early impressions of Congress, discuss conservative policy priorities, and preview upcoming legislative fights. Thanks to Tom, Rep. Norman was able to build relationships with Heritage Action Sentinels and see firsthand the support he had for championing conservative causes in Congress.



## Thomas Binion

Director, Congressional and Executive Branch Relations

# Promoting Conservative Policy

In September 2016, Heritage Founder Edwin J. Feulner and Ronald Reagan Distinguished Fellow Becky Norton Dunlop both took second jobs and began reporting to work at a new address: Trump Transition headquarters on Pennsylvania Avenue. Each day, they arrived with boxes full of research materials: volume after volume of *Blueprint for Reform* and *Blueprint for a New Administration*. They also brought files full of resumes and recommendations of conservatives eager to assist a new president.

The books, part of our *Mandate for Leadership* series, identified critical reforms Executive Branch officers could implement on their own, without seeking congressional approval. Feulner and Dunlop had to keep replenishing the book stock, because transition team members wanted to review them as they prepared

their policy reports for the new president and to provide them to candidates preparing to serve in the incoming administration.

In January, then-White House Director of Budget Policy Paul Winfree distributed copies of *Blueprint for Balance* to career

DAVID HILLS



*Resource Bank turns 40. LEFT: Vice President Bridgett Wagner welcomes more than 430 conservative leaders to the 40th annual Resource Bank Meeting. Featured speakers included: (CLOCKWISE FROM TOP RIGHT) Kentucky Gov. Matt Bevin, syndicated radio host Dennis Prager, EPA Administrator Scott Pruitt, and former House Speaker Newt Gingrich.*

officials at the Office of Management and Budget. Months earlier, as director of our Roe Institute for Economic Policy Studies, Winfree had overseen the compilation of this plan to balance the federal budget within 10 years. As he passed out the copies, he also issued instructions: “Incorporate as many of these recommendations as possible into the president’s budget proposal.”

With the research done and in the right hands over at the Executive Branch, it was time to “sell” those recommendations to Congress. That assignment fell largely to Thomas Binion, our director of congressional and Executive Branch relations. And Binion and his team worked wonders.

### Moving Conservative Solutions to the Front Lines

In January, they hosted the Conservative Members Retreat in New York City. The event drew some 50 conservative members of the House. The agenda focused on the two biggest tasks facing the first session of the 115<sup>th</sup> Congress: repealing Obamacare and reforming the tax code.

Upon their return to D.C., Binion’s team got down to the day-to-day promotion of our policy agenda. Every week, Binion hosted the “Monday Group,” a cross-section of conservative decision-makers representing Congressional leadership and other Hill offices as well as outside conservative policy and advocacy groups. At these meetings, participants map

out short- and long-term legislative priorities—a process that often involves open debate of the merits of a particular proposal or strategy emerging on the Hill.

His team also organized two weekly luncheons: one for conservative communicators, the other for House legislative directors. In both venues, participants identify specific information needs and strategy options for advancing conservative policy proposals.

At mid-year, Binion became a regular columnist for *The Hill*, the “insider” publication most widely read by Washington’s political movers and shakers. It proved an invaluable vehicle for publicly promoting Heritage policy recommendations to our key audiences.

In the course of the year, Binion’s team arranged dozens of policy briefings by Heritage experts for members of Congress, their staff, and first-time candidates who will run for office in 2018. They also hosted occasional dinners for members of Congress, such as the Oct. 3 dinner where Under Secretary of the Treasury David Malpass joined 11 conservative members to discuss tax reform.

Of course, everyone knows how the push for tax reform turned out. But that was just one of many conservative victories realized in 2017. By year’s end, the administration had embraced 208 of our Mandate policy recommendations.



TOP: Heritage's Summer 2017 Intern Class on a much anticipated tour of the White House. BOTTOM LEFT: Elle Rogers (far left) and Meridian Paulton represent Heritage in a debate with CATO Institute interns moderated by National Review editor Charles C. W. Cooke. BOTTOM RIGHT: Interns Dylan Brandt, Emma Meshell, Lindsey Curnutte, and Maddie Crick attend Heritage's "Welcome to Washington" networking event in June.

## Building the Conservative Movement

Heritage has been referred to as “the mother church” of the Conservative Movement. Perhaps Bridgett Wagner should be called its “mother hen.” In her 36 years with Heritage, Wagner has not only met virtually everyone in the conservative movement, she has introduced every one of them to someone else in the movement. That’s how a movement builds.

In 2017, Heritage named Wagner its vice president of policy promotion. From that post she oversees our outreach to the White House, the Hill, and allied organizations in the conservative movement. She also oversees our educational and talent development initiatives—from Lectures & Seminars to the Young Leaders Program.

A highlight of the year came in May, when more than 430 conservative leaders traveled to Colorado Springs to participate in our 40th annual Resource Bank Meeting. “Rise to the Challenge” was the theme of the gathering, which featured informative and inspiring presentations at the general sessions, augmented by breakout sessions that acquainted attendees with innovative policy ideas

percolating at the state level and rising leaders in the Conservative Movement.

Participants voted Kentucky Gov. Matt Bevin “most valuable speaker,” but he faced tough competition from other keynoters such as former House Speaker Newt Gingrich, Rep. Jim Jordan, R–Ohio, and talk radio host Dennis Prager.

## Developing—and Placing—Talented Conservatives

Heritage’s Truluck Center for Leadership Development coordinates a variety of professional development programs and talent recruitment and placement programs to strengthen the Conservative Movement.

Director Kristine Bramsen and Job Bank Manager Kyle Bonnell regularly provide staffing recommendations for newly elected governors and members of Congress. Both were especially busy at the end of 2016 and early in 2017 serving on the Presidential Appointments team of the Trump Transition.

The Job Bank matches Heritage interns and other talented young conservatives just starting their careers with exciting

opportunities on Capitol Hill, within the Executive Branch, or among conservative allies. In 2017, the Job Bank connected 60 “first-timers” with jobs in these sectors. It also helped more than 30 experienced conservatives land even better jobs in offices where they can help keep the movement pushing forward.

How impressive is that? Well, for the third consecutive year, LinkedIn recognized Heritage as a Top 100 “Power” recruiter.

Of course, the Truluck Center also works to help Heritage and Heritage Action staffers achieve their full potential. In 2017, the Center graduated 45 emerging leaders from its “Principles of Leadership” training series.

To reach even more staff, the center launched “Degreed,” a new online learning platform that provided customized, small-group information-sharing sessions for 100 colleagues.

### Reaching the Hill and Beyond

Heritage “trained up” hundreds of conservatives on the Hill in 2017, offering four programs designed to build the bench of the conservative movement and make conservative congressional staff members even more effective. This multi-tiered fellowship approach follows staffers throughout their careers on Capitol Hill. No matter what position an individual currently holds, there’s an educational opportunity tailored specifically for him or her.

The first step on this journey is the Heritage Congressional Fellows Program. Established 15 years ago, HCF teaches junior staffers the first principles of conservatism and offers both policy discussions and job skills development to prepare them for effective careers on and off Capitol Hill. In 2017, 55 Hill staffers graduated from the nine-month-long program, which is co-managed by our B. Kenneth Simon Center for Principles and Politics.

In 2017, we launched a brand new program targeted to HCF graduates who are taking the next step in their career. “Take that Hill: Leadership Skills for Congressional Staff” is a six-part leadership training series for junior Capitol Hill staff. The inaugural class of 24 was led by three distinguished leaders from our Center for National Defense: Dr. Steven Bucci, retired Army Lt. Gen. Thomas Spoehr, and Senior Research Fellow J. V. Venable, a former commander of the Air Force Thunderbirds and author of *Breaking the Trust Barrier*, a book on how to manage high-performance teams.

For those who have specialized in a career in foreign policy or national defense, our George C. Marshall Fellows Program, coordinated by Heritage’s Davis Institute, steeps future foreign policy and national security leaders in conservative ideas. In 2017, featured outside speakers included former Bush



### *Meet Emily Hall*

Heritage Intern (Center for Legal and Judicial Studies)—Summer 2017



“An unabashed conservative at the world’s most famous university.” That’s how the *Boston Herald* describes Emily Hall.

Certainly, the Harvard Senior is not one to hide the principles she holds dear. On campus, Emily proudly serves as president for the Network of Enlightened Women and vice-president of the Harvard College Republicans.

While Emily finishes work on her degree in Government, she continues to moonlight as a correspondent for Campus Reform. And her reports on liberal bias and violence on campus have earned her a national audience. She has appeared several times on the FOX News network (photo above) to discuss issues such as the erosion of free speech on campus.

Today, too many colleges seem more interested in maintaining political correctness than in teaching—much less, defending—First Principles. But with Heritage-educated and dedicated young conservatives like Emily holding fast, there is reason to hope for a better future.

administration Homeland Security Adviser Fran Townsend and former NSA Director Gen. Michael Hayden. Participants also engage in projects that help them incorporate America’s traditions, values, and worldwide responsibilities into a grand strategy.

In October, Marshall Program participants travelled to the Virginia Military Institute to participate in the annual Yalta simulation. The program concluded in November with a graduation dinner and discussion of the challenges of statecraft with the Polish ambassador and the Swedish military attaché. Previous graduates of this program now serve in senior positions in Congress, the Trump administration, and the private sector.

And, in 2017, we strengthened the program even further, tying in with the Daniel Morgan Graduate School of National Security, a new graduate school providing professional and executive education to those working—or aspiring to work—in the national security field. One side benefit of this partnership: we were able to present the first annual Daniel Morgan Lecture, “Defeating Terrorism in the Age of Trump,” by Dr. Sebastian Gorka. We graduated 19 Marshall Fellows in 2017.

Our Feulner-Weyrich Fellows Program provides leadership training to the most senior-level congressional staff. These Capitol Hill influencers already know the lay of the land, so this master class is designed to put sharp edges on their operational, legislative, and strategic skill sets. One highlight of the 21-session program: a retreat to Maryland’s Eastern Shore, where participants engaged in an intense, simulated legislative negotiation. In another session, the fellows received a productive and collaborative briefing from members of the White House Legislative Affairs staff.

### Young Leaders Program

Our Young Leaders Program is a 12-15 week internship for smart, conservative college students and recent graduates. The program prepares them to move into positions of influence in government, corporate boardrooms, and academia, where they will help rebuild America according to the vision of the nation’s Founders.

We know the program works. Among the ranks of former Heritage interns are Sen. Tom Cotton, R-Ark., (Heritage class of 1997), political strategist Ford McConnell (Heritage, 2001), *Weekly Standard* Editor-in-Chief Stephen Hayes (Heritage, 1993), and Will Dunham (Heritage, 2008), policy director for House Majority Leader Kevin McCarthy.

What’s our formula for success? Yes, the interns get hands-on experience working for a conservative policy institute. But they get much more than that: a lecture series on First Principles, weekly policy briefings from top experts, field trips, reading groups, and skills-development workshops.

In 2017, our interns were also able to experience several rather special events. Our spring class of 60 interns, for example, attended inauguration parties and sat in on nomination hearings.

Our fall class of 57 interns witnessed presentation of the Distinguished Intern Alumni Award to Marjorie Dannenfelser, president of the Susan B. Anthony List. They also made the short trip to the Supreme Court, where they met with Justice Clarence Thomas on the same day oral arguments were delivered in the *Masterpiece Cakeshop* case.

A total of 184 young people participated in the 2017 Young Leaders Program. Two of them are profiled elsewhere on these pages. All of them have a bright future. 🇺🇸

## *Meet Harrison William P. Floyd*

Heritage Intern (Marketing)—Fall 2017



Harrison William Prescott Floyd comes from a family with a history of service in the Armed Forces. So it came as no surprise when he enlisted in the U.S. Marine Corps directly out of high school.

During his 10 years of service, he completed three combat deployments in the Infantry, trained troops in Combat Marksmanship at Parris Island, and served as an Information Operations Planner and Martial Arts Instructor Trainer at Marine Corps Base Quantico in Virginia.

After the military, H.W. planned to pursue a career as a professional mixed martial artist. However, after

volunteering at a veterans’ service organization, he decided he should be fighting on the Hill instead of inside a ring.

Currently enrolled at The George Washington University, H.W. is pursuing a master’s in Legislative Affairs. In his spare time, he serves on the fiduciary board of the HillVets Foundation and is the Campus Ambassador for FourBlock, a nonprofit that helps veterans launch new careers that match their calling and maximize their potential. He is also the liaison for veterans serving in state legislatures at Veterans Campaign and the Managing Partner at Arrows & Olives.

After graduation, H.W. hopes to work on Capitol Hill, putting to good use the leadership skills he learned in the Marine Corps—and in Heritage’s Young Leaders Program.



WILLIS BRETZ

# 2017 Named Interns

## Caesar Arredondo Interns

Maiya Clark, *University of Southern California*  
Diana Guevara, *Florida International University*  
Lauren Hand, *The Catholic University of America*  
Helaina Hirsch, *Patrick Henry College*  
Jennifer Montazzoli, *Grove City College*  
Seth Moreida, *Tufts University*

## H. N. and Frances C. Berger Foundation Interns

Abigail Barnes, *Cedarville University*  
Chance Fletcher, *Princeton University*  
Zachary Olden, *Stockton University*  
Valerie Oppenheim, *Binghamton University*  
Meridian Paulton, *Patrick Henry College*  
Elle Rogers, *The King's College*

## Bruce E. Bowen Intern

Hugh Danilack, *Dartmouth College*

## John and Barbara Bruning Intern

Christian Costa, *Clemson University*

## Elizabeth Mallinckrodt Bryden Intern

Caleb Ecarma, *North Greenville University*

## David V. Burgett Interns

Emily Adamson, *Augustana University*  
Madison Laton, *Duke University*

## David Joseph Burke Intern

Laura Cermak, *Christendom College*

## Mary H. Campbell Foundation Intern

Gaby Anciola, *Texas A&M University*

## Carter and Moyers Intern

Dylan Brandt, *University of Colorado—Colorado Springs*  
Destry Edwards, *Bob Jones University*  
Nicole McGovern, *St. John's University*

## Richard Earl Carter Meese Center Intern

Krista Chavez, *American University*

## Gene D'Agostino Meese Center Intern

Kaitlyn Finley, *University of Science and Arts of Oklahoma*

## John R. and Margrite Davis Foundation Intern

Jordan Bernstein, *University of Virginia*

## Gary L. Dawson Interns

Marie Brown, *Roanoke College*  
Robert Ordway, *Valparaiso University*

## Rebecca Eddy de Broekert Intern

Michael Rury, *Williams College*

## Franklet Intern

William Tresch, *University of Texas at Dallas*

## Berniece and William Grewcock Interns

Karl Keyzer-Andre, *Hillsdale College*  
Margaret Smith, *Hillsdale College*  
Cassidy Syftestad, *Hillsdale College*  
Jackson Ventrella, *Hillsdale College*  
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## Jan Hair Intern

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## Haskell Robinson Interns

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Jacob Lubenow, *University of Wisconsin – Madison*  
Rachael Wolpert, *Trinity University*

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Emily Hall, *Harvard College*

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Charles Melcombe, *Pepperdine University*



## Genevieve Wood

Senior Communications Advisor and Senior Contributor to *The Daily Signal*

## Communications

Even as a child, Genevieve Wood was a news junkie. She read voraciously—everything from the daily *Texarkana Gazette* to her father’s *Policy Review*. Nightly television news broadcasts were must-see TV. Her favorite program: NBC’s “Today Show” (then still a news program).

Fast-forward to her senior year at the College of Charleston. Hurricane Hugo had hit the coastal South Carolina town bringing devastation—and “Today Show” host Jane Pauley to cover it.

The NBC crew needed a “runner.” Wood got the job and ultimately parlayed that experience into a role with the NBC news team in New York.

Three years later, in 1994, she decided she’d had enough of covering the news. She wanted to use her communications skills to promote the causes and ideas she believed in.

So, it was off to Washington, D.C., where she worked for various cause-oriented organizations—from the Family Research Council to the Republican National Committee—before landing at Heritage in 2006.

DAVID HILLS



*With the Obamacare debate underway in the House, the Heritage Communications team convened a roundtable discussion of conservatives' drive for full repeal. The Feb. 8 event attracted 23 Capital Hill reporters and featured speakers such as (FROM LEFT) Heritage health policy expert Alyene Senger (now with the Senate Republican Policy Committee), Rep. Jim Jordan, R-Ohio, Rep. Mark Meadows, R-N.C., and Sen. Mike Lee, R-Utah.*

Today, Wood pulls double duty as both senior communications advisor and senior contributor to *The Daily Signal*, Heritage's multimedia news organization. And she's back "on camera" as often as ever—not just as an interviewer, but as a respected commentator and spokeswoman.

In 2017, her video commentary on how communities came together after Hurricane Harvey received an incredible 10 million views. A 30-second excerpt from her interview with Kentucky Gov. Matt Bevin on the topic of gun safety garnered 14 million views.

"I truly believe I have the best job in the conservative movement," Wood says. "I get to meet really smart people, really powerful politicians, even celebrities.

"Best of all, I get to ask them questions that others would love to ask—questions that help people understand what's going on in the culture wars and the policy battles on Capitol Hill—and explore how those debates will affect the quality of our lives and the character of our society."

### From Videos to Podcasts

Of course, Wood isn't the only video "star" at Heritage. Our Digital team has been producing video news and opinion pieces for years, and in 2017, they took production to another level—increasing the number and up-grading the quality of our videos.

People noticed. By year's end, Heritage and Daily Signal videos had earned over 200 million views.

The team also raised Heritage's profile in the increasingly popular medium of podcasting. We now produce and promote four weekly podcasts:

- *Mass Ave*—insightful analysis from Heritage experts on the policy debates happening in Washington.
- *SCOTUS 101*—Heritage legal experts Elizabeth Slattery and Tiffany Bates explain what's happening at the Supreme Court.
- *Problematic Women*—*The Daily Signal's* Kelsey Harkness and *The Federalist's* Bre Payton showcase strong conservative women, current events, and the hypocrisy of liberal feminists.
- *Right Side of History*—*The Daily Signal's* Jarret Stepman and Fred Lucas examine historical events and push back against the Left's rewriting of history.

We also produce a daily podcast, *The Daily Signal*. Hosts Katrina Trinko and Daniel Davis update listeners on each day's top stories and interview Heritage experts who can share new insights into what's happening and what's ahead. In 2017, Heritage entered a partnership with Ricochet network to share all five podcasts with an even larger audience.



**202,147,509**

Heritage and *Daily Signal* combined video views—up from 52,000,000 in 2016



**1,424,154**

monthly unique visitors to **DailySignal.com**



**1,023,765**

active *Daily Signal* e-mail subscribers



**808,282**

Facebook fans up from 662,487 in 2016



**52,500**

Twitter followers, up from 40,000

THE DAILY SIGNAL

SEARCH CONNECT MENU

HEALTH CARE / NEWS

# One Mom's Fight for Her Special Needs Son in the Age of Obamacare

Melissa Quinn / @MelissaQuinn97 / February 21, 2017 / comments

Twitter Facebook LinkedIn Email



Since Obamacare's implementation in 2014, insurers have narrowed their network to cut costs. That change has been especially harmful to Marjorie Weer, whose son, Montgomery, right, has spina bifida and needs to undergo testing at Boston Children's Hospital. (Photo: Marjorie Weer)



After reading a Daily Signal story about Marjorie Weer's battle with Obamacare, White House staff invited her and her son, Monty, to meet with Vice President Pence in June (TOP RIGHT) and President Trump in July (BOTTOM RIGHT). At both events, Weer recounted her struggle to get Monty, who suffers from spina bifida, the care he requires.

## The Daily Signal: Making a Mark

The Daily Signal, Heritage's online news and opinion outlet, attracted millions of engaged viewers in 2017. But numbers don't tell the full story. Just as important was the matter of *who* was viewing.

Grace-Marie Turner, president of the Galen Institute, is one regular reader. She finds the content insightful and useful. After all, she cited *The Daily Signal's* reporting on Obamacare in her testimony before the House Budget Committee.

Another satisfied customer: former White House Press Secretary Sean Spicer. In an interview with Fox News' Sean Hannity, he recommended *The Daily Signal* as an excellent alternative to mainstream media.

Indeed, *The Daily Signal* seems to enjoy a loyal readership in many wings of the White House. West Wing Reads, the daily summary of what the White House is reading—and wants others to read—circulated more than a dozen *Daily Signal* news reports and summaries.

Always looking to innovate, *The Daily Signal* launched a new video series, "Underreported, with Kelsey Harkness." As the name suggests, it covers stories that the mainstream media choose to ignore. The first installment was a mini-documentary addressing many misconceptions held by the general public (and the media) regarding fire-arms suppressors.

Another installment told how Donald Trump, as a private citizen, saved Central Park's iconic Wollman Skating Rink in the 1980s. It's the kind of story that doesn't fit the liberal narrative—so the mainstream media won't touch it. *The Daily Signal* did.

The "Underreported" series was just a small part of the work done by Harkness, a senior news producer at Heritage. And the quality of her work did not go unrecognized. The Colorado-based Steamboat Institute named Harkness its 2017 Tony Blankley Fellow—a recognition of her "gift for communicating conservative policy in a language all of us can understand: human emotion." 📌

THE WHITE HOUSE

## The Daily Signal: Reporting and Commentary That Makes a Difference



GuideStar is a highly influential nonprofit. It collects information about other nonprofits to help guide the giving decisions of philanthropists and philanthropic organizations across the country.

But in 2017, GuideStar went beyond information collection. It labeled dozens of conservative nonprofits as “hate groups.” The absurd label reflected “research” done by the far-Left Southern Poverty Law Center.

*Daily Signal* reporter **Rachel del Guidice** exposed the calumny for what it was. Her reporting was featured on the *Drudge Report*, sparking howls of outrage on radio talk shows and other conservative media. Within a month, GuideStar conceded its error and removed the “hate” labels.



**Rachel del Guidice**  
Daily Signal Reporter



**Mike Gonzalez**  
Senior Fellow

Before President Trump took office, the U.S. Census Bureau announced plans to add a new demographic category—Middle Eastern/North African (MENA)—to its 2020 survey. Recognizing it as another bid to divide Americans by promoting identity politics, Senior Fellow **Mike Gonzalez** went on the media warpath.

In commentaries for *The Daily Signal*, *The Wall Street Journal* and *National Review*, he warned of the dangers of creating a new ethnic group. The public responded. Within weeks, comments on Regulations.gov increased seven-fold and switched from mostly supportive to all opposed to the Census proposal.

On Jan. 26, 2018, the Bureau announced it no longer planned to add a MENA category to the 2020 census.



MIDDLE PICTURE: *Nolan Peterson*, *The Daily Signal*'s foreign correspondent in Ukraine, tours a front-line trench in Shyrokyne as he investigates the impact of modern-day trench warfare on Ukrainian troops (April 2017). BOTTOM PICTURE: Peterson (LEFT) shares a trench bench—and a conversation—with a Ukrainian soldier.



*By year's end, we were putting the finishing touches on the E.W. Richardson Building (far right), the fourth building in Heritage's Freedom Center complex. When opened in May 2018, the Richardson Building will provide housing for over 60 interns each semester, allowing us to expand even further our outreach to—and influence on—America's next generation of leaders.*

## People Are Policy

Heritage is home to some of America's most thoughtful and insightful policy analysts. And we've been blessed with donors who are committed to making sure that we can continue to attract and retain top-flight scholars. Here are the fellowships—and the analysts they support—that played such a crucial role in our 2017 successes.



Joseph C. and Elizabeth A. Anderlik Fellow  
Jennifer A. Marshall



Jay Kingham Senior Fellow in International Regulatory Affairs  
Brett D. Schaefer



John, Barbara, and Victoria Rumpel Senior Legal Fellow  
Alden F. Abbott



AWC Family Foundation Fellow  
David Azerrad, Ph.D.



Mark A. Kolokotronis Fellow in Economic Freedom  
Amb. Terry Miller



William E. Simon Senior Research Fellow in American Principles and Public Policy  
Ryan T. Anderson, Ph.D.



Chung Ju-yung Fellow for Foreign Policy Studies  
Edwin J. Feulner, Ph.D.



Bernard and Barbara Lomas Senior Research Fellow  
Nile Gardiner, Ph.D.



Will Skillman Fellow in Education Policy  
Lindsey Burke



Ed Gilbertson and Sherry Lindberg Gilbertson Senior Legal Fellow  
John G. Malcolm



Herbert and Joyce Morgan Fellow  
Nicolas Loris



Margaret Thatcher Fellow  
Robin Simcox



Marilyn and Fred Guardabassi Fellow in Media and Public Policy  
Kenneth McIntyre



E.W. Richardson Fellow  
James Jay Carafano, Ph.D.



Jay Van Andel Senior Analyst in Trade Policy  
Bryan Riley



Grover M. Hermann Fellow in Federal Budgetary Affairs  
Romina Boccia



Preston A. Wells, Jr. Fellow in Health Policy  
Edmund Haislmaier



John Von Kannon Fellow in Philanthropy  
J.B. Horton

DAVID HILLS



Ronald Reagan  
Distinguished Fellow  
Becky Norton Dunlop



Distinguished Fellow  
in Conservative Thought  
Lee Edwards



Ronald Reagan  
Distinguished Fellow Emeritus  
Edwin Meese III



Distinguished  
Visiting Fellow  
Stephen Moore

## Distinguished Fellows

Only a select few of our scholars bear the title: Distinguished Fellow. Heritage reserves that title to honor individuals who, in addition to their demonstrated commitment to rigorous research and conservative principles, have compiled a record of outstanding achievement outside the think tank world.

In 2017, Heritage was home to four Distinguished Fellows.

### Becky Norton Dunlop

The plaque outside her office reads: “Becky Norton Dunlop, Ronald Reagan Distinguished Fellow.” But Dunlop’s office is quite often empty. That’s because she’s across town, giving policy and personnel advice to Trump administration officials. Or on the road, advising American conservative leaders. Or counseling pro-freedom organizations in the U.K., the E.U., Israel, and Africa.

For example, in 2017, she hosted the Environmental Leaders Conference, bringing EPA Administrator Scott Pruitt together with 30 free-market environmental leaders from around the nation. Then she was off to the AfriCANDO Conference on U.S.-Africa trade and investment, where she delivered a keynote speech stressing the benefits of free markets to all peoples. Think of her as Heritage’s global ambassador for the conservative movement.

### Lee Edwards

*Lee Edwards has always been in the forefront of the struggle to restore America, to bring it back to its ancient moorings...*

—Ronald Reagan

Dr. Lee Edwards is Heritage’s distinguished fellow in conservative thought. Reagan biographer Craig Shirley has dubbed him “the unofficial historian of 20th century American conservatism.”

But Edwards has done more than chronicle the conservative movement. He has lived it. His entire adult life has been inextricably intertwined with the movement—which is

what makes his autobiography, *Just Right: A Life in Pursuit of Liberty*, such a fascinating and inspirational read.

Published in October, *Just Right* is the 25th book in Edwards’ literary canon. As Richard Viguerie has noted, Edwards is now the longest-serving “driving force” behind conservative thought and activism in the U.S.

### Edwin Meese III

Just how distinguished is Edwin Meese III, our Ronald Reagan distinguished fellow emeritus? Well, in 2017 alone he collected three new honors: the Distinguished Service Medal from the Military Order of Foreign Wars of the United States, the Phyllis Schlafly Award for Excellence in Leadership from the Eagle Forum, and the Pacific Justice Institute’s Founders Award.

The former U.S. attorney general continues to be a prime mover of conservatism. He leads our biannual Legal Strategy Forums as well as monthly coordinating meetings of freedom-based public interest law groups. In March, he convened a summit meeting of leading police chiefs and criminologists from across the country to discuss the current state of policing. Growing out of that meeting was a Heritage Special Report, “Policing in America: Lessons from the Past, Opportunities for the Future.”

### Stephen Moore

Distinguished Visiting Fellow Stephen Moore heads up our Project for Economic Growth. Throughout the year, he worked closely with the White House and congressional leaders to devise a tax reform plan that would maximize job creation, wage increases, and economic growth.

A syndicated columnist and frequent television commentator, Moore engaged in a non-stop media campaign stressing the need for lower tax rates, immediate expensing of all business capital investments, and the elimination of special-interest tax breaks and double taxation of foreign profits.

When the debate was over, Moore had carried the day on all major provisions. Within weeks, the economy was growing at a pace not seen in years. 📈



*More than 1,000 Heritage members, supporters, and allies welcomed President Donald Trump and key members of his administration to our annual President's Club meeting in October.*

## Heritage Members ... Unwavering, Unshakable, Unstoppable

Throughout what was a year of incredible change—for America and for The Heritage Foundation—our members kept their eyes on the goal: Stop the Left from thwarting the greatest conservative resurgence in 30 years; reclaim America; “drain the swamp!”

Their impact has been extraordinary. Time and again, Heritage Foundation and Heritage Action for America members stepped up when it mattered.

- They helped get tax reform over the finish line in December, giving all of America a much-needed economic boost.
- They sprang into action to get President Trump’s judicial and other nominees confirmed to positions throughout the government.
- They put a stop to hundreds of bad Obama-era environmental and energy regulations.
- They gave children struggling in failing schools a way out through education choice.

It is their giving—of time, talents, and financial support—that made The Heritage Foundation “the No. 1 think tank in the world when it comes to impacting public policy.” That’s not Heritage talking. That’s the conclusion of a recent study by the University of Pennsylvania.

And at the end of 2017, they warmly welcomed Kay Coles James as Heritage’s president-elect.

The generosity of their giving continues to gratify and humble us. In 2017, our growing family of supporters, now more than a half-million strong, contributed more than \$119 million in gifts, pledges, and estate commitments to Heritage and Heritage Action. They brought us within \$55 million of the ambitious, \$750 million goal of our six-year Reclaim America Campaign, which will come to a conclusion Dec. 31, 2018.

On the following pages, you will read about a few Heritage members who have demonstrated both amazing generosity and sustained support over the years. But literally hundreds of thousands more stories—all of them inspiring—can be found among our members.

Their love of country, their belief in the American Dream, and their faith in Heritage inspire us every day. 🇺🇸

WILLIS BRETZ

*Taking a break from touring the White House, Heritage members get a briefing from Interior Secretary Ryan Zinke in the South Court Auditorium of the Eisenhower Executive Office Building, Oct. 26.*



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*Eighteen Founders have asked to remain anonymous*

## Membership Levels

Heritage welcomed more than **85,000** new members in 2017. Our range of membership levels and benefits can accommodate all.

| Level                                 | Starting @         |
|---------------------------------------|--------------------|
| <b>Basic</b> .....                    | <b>\$25</b>        |
| <b>Patriots Club</b> .....            | <b>\$100</b>       |
| <b>Young President's Club</b> .....   | <b>\$250</b>       |
| <b>President's Club</b> .....         | <b>\$1,000</b>     |
| <b>Executive Committee</b> .....      | <b>\$2,500</b>     |
| <b>Premier President's Club</b> ..... | <b>\$5,000</b>     |
| <b>Associate</b> .....                | <b>\$10,000</b>    |
| <b>Executive Associate</b> .....      | <b>\$25,000</b>    |
| <b>Premier Associate</b> .....        | <b>\$50,000</b>    |
| <b>Founder</b> .....                  | <b>\$100,000</b>   |
| <b>Trustees' Circle</b> .....         | <b>\$500,000</b>   |
| <b>Chairman's Circle</b> .....        | <b>\$1,000,000</b> |

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

## 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.

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1. Founders Peter and Kay Winzenried flank UN Ambassador Nikki Haley at the 2017 President's Club Meeting. Joining them is Thomas Wilson, that semester's Peter and Kay Winzenried Intern.
2. Founders Bill and Brenda Amos with Rep. Ron DeSantis, R-Fla., Trustee Virginia Heckman, and Heritage Director of Donor Relations Andrew McIndoe at President's Club.
3. Associate Kedren Scales, Founder Betty Anderlik, and Founder James Eller take a break from the cooking competition at the 2017 Annual Leadership Conference.
4. Doris Gradde, Billi Jean Murphree, and Kay Robbins visiting Lincoln Cottage for the Associate Members Dinner during President's Club.
5. Ambassador J. William Middendorf II, a Heritage trustee, arrives at the President's Club White House Briefing with Isabelle Lacombe, membership associate.
6. Founders Janet and Robert Miller at the White House briefing.
7. Fox News host Brian Kilmeade jokes with Associates John and Jean Hedberg at a President's Club book signing.
8. Heritage Trustee Mark Kolokotronis enjoys the reception at the 2017 Annual Leadership Conference.

\*ALL PHOTOS IDENTIFY LEFT TO RIGHT.



*Harold Siegel, flanked by Heritage Vice President John Fogarty (LEFT) and Heritage Founder Edwin J. Feulner, was honored with our 2017 “Coors, Noble, Scaife Founders Award” in October.*



*Bill and Lynda Middlemas receive the “Addition and Multiplication” Award from Heritage Founder Edwin J. Feulner at the Annual Leadership Conference in April.*



*Marjorie Dannenfelser (LEFT), president of the Susan B. Anthony List, received our “Robin and Jocelyn Martin Young Leaders Program Distinguished Intern Alumni Award” from Heritage’s Helena Richardson and Premier Associate Robin Martin, co-sponsor of the award.*



*Ali Richardson accepts our “George Washington Generations Yet Unborn Award” on behalf of Trustee’s Circle Member Patrice Richardson and Founder Barbara Richardson (her aunt and grandmother, respectively) at the 2017 Annual Leadership Conference.*

## *Other 2017 Heritage Award Winners*

**Coors, Noble, Scaife Founders Award**  
Founders Pat and Robin Stranahan

**John Von Kannon Patriot Award**  
Bob Ellis, Glen Mills, Pa.;  
Dr. James Piereson, New York, N.Y.

**The Edwin J. Feulner “Addition and Multiplication” Award**  
George Brown, Bonita Springs, Fla.

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## Meet Norman Metcalfe



Given his MBA and long experience as chief financial officer of several major public and private companies, it's no wonder Premier Associate and Heritage Legacy Society member Norm Metcalfe takes issue with a Congress seemingly incapable of balancing a checkbook. Fiscal conservatism first led him to Heritage more than 20 years ago. Since then, his appreciation and understanding for all the work done by Heritage—and more recently, Heritage Action—has grown exponentially.

“It’s frustrating to be one citizen out of 320 million,” says Metcalfe. “Supporting Heritage is a chance to guide the policies of our country. From the work you do in Congress to getting the message out to the American public through channels like *The Daily Signal*, I appreciate the breadth of Heritage’s impact. One person can’t do very much, but Heritage has a big enough presence to make a significant difference for all of us.”

Metcalfe recently made an inspired decision to name both The Heritage Foundation and Heritage Action the ultimate beneficiaries of his IRA. “Leaving my IRA to my children would mean more than half of it would vanish in taxes. Giving it to Heritage through my estate is tax effective and will make such a difference.”

“I worry about my children and what the country would have looked like after eight years of Hillary Clinton,” says Metcalfe. “It’s heartwarming to see President Trump has already adopted 64 percent of Heritage’s *Mandate for Leadership* recommendations, even higher than Reagan’s 49 percent. That’s a real tangible for me to take away as a supporter.”

“For Heritage to strategically get in there early and help steer this great ship in the right direction shows tremendous initiative.”

“I view Heritage as True North for our country,” Metcalfe says. “Sometimes we get off track—these things tend to go in cycles—but when opportunity arises, Heritage is the North Star America needs.”



1. RIGHT TO LEFT: *Founders Leonard Robinson and Jeanne Haskell, Heritage's Heather Davis, and Haskell's nephews Jeremy and Ruy Bautista enjoy the final reception at the Annual Leadership Conference.*
2. *Heritage Trustee Ryan Haggerty (CENTER) and his wife Regan catch up with Heritage's J.B. Horton at the Annual Leadership Conference.*
3. *Gathering to celebrate Preston A. Wells Day at Heritage are (LEFT TO RIGHT) Heritage Founder Edwin J. Feulner, Trustee's Circle Member Walter Bell (a trustee of the Lillian S. Wells Foundation), the Rev. George Smith, and Heritage Vice President Jennifer Marshall.*

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*Thirty-six Associates have asked to remain anonymous*

## John and Barbara Rumpel: Standing with the Constitution

In his youth, John Rumpel of Melbourne Beach, Fla., heard the adage, “There are none so blind as those who will not see.” It sprang to mind again as he reflected upon America’s current ideological divide.

“Liberals don’t think; they react emotionally,” he says. “I believe that’s where The Heritage Foundation has an impact, because Heritage experts think things through with logic and common sense, and they come out with the right course for our country.”

Mr. Rumpel and his wife, Barbara, are members of Heritage’s Chairman’s Circle and the Heritage Legacy Society. They first became supporters in 2010, after hearing Sean Hannity praise Heritage’s conservative leadership.

Both are passionate about a number of issues, but their conservatism and their outstanding support for Heritage ultimately reflect a steadfast belief in the importance of the U.S. Constitution.

“A lot of people worked very hard to create the Constitution, and many have fought to protect it and have even given their lives in its defense,” Mr. Rumpel notes. “If we just give up on it now, that’s like saying all those people died in vain.”

The Rumpels see The Heritage Foundation as a critical line of defense for constitutional values.

“I think Heritage, being founded on the principles of the Constitution, can help our elected officials form public policy that is conservative and that adheres to the ideals of America’s Founding,” says Mrs. Rumpel.

Mr. and Mrs. Rumpel take pride in seeing their support for Heritage in action.

“I’m thrilled that Heritage is playing such an important role in the Trump administration, and that the policy

guidelines Heritage developed are being followed so closely,” Mrs. Rumpel explains. “And I am very optimistic about Heritage’s future under Kay Coles James.”

The Rumpels are excited to be part of Heritage’s future. According to Mrs. Rumpel, “I think the best legacy we can leave is the continuation of this country under the Constitution, as it was written, and Heritage plays a key role in that.”

And with the Constitution as a touchstone, the Rumpels feel there is no challenge America can’t conquer. “The problems we have in our society are not difficult,” Mr. Rumpel says. “It just takes courage to deal with them.”

Mr. and Mrs. Rumpel are fearless in speaking out for what’s right, and The Heritage Foundation is stronger because of their outstanding leadership.



*John and Barbara Rumpel met Sean Hannity (MIDDLE) at The Heritage Foundation’s President’s Club Meeting in 2015.*





*Heritage Legacy Society Wall of Freedom*

# Safeguarding Our Founding Principles for Future Generations

*Our duty to ourselves, to posterity, and to mankind call on us by every motive which is sacred or honorable, to watch over the safety of our beloved country...*

**—Thomas Jefferson 1809**

The members of the Heritage Legacy Society have shown their enduring love for America by making a commitment to safeguard our founding principles for future generations. Chaired by Rae and Belden Bell of Marshall, Va., 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 2017:

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 Mr. Charles Winant  
 Mr. John C. Winkler  
 Mr. Al Woodill  
 Mr. Keith Zibell

*Thirteen 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 2017.

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| Mr. Carl Lagrassa         |                            |
| Mr. Carl R. Lezius        |                            |

*Fifteen Heritage Legacy Society members asked that their gifts remain anonymous.*

# 2017 Financial Statements

## STATEMENT OF FINANCIAL POSITION\*

As of December 31, 2017

### ASSETS

|                              |                   |
|------------------------------|-------------------|
| Cash and cash equivalents    | \$7,032,712       |
| Receivables                  | 8,242,842         |
| Prepayments and other assets | 760,214           |
| <b>Total current assets</b>  | <b>16,035,768</b> |

|                               |                    |
|-------------------------------|--------------------|
| Investments                   | 207,523,156        |
| Receivables, net              | 6,202,498          |
| Property and equipment, net   | 85,207,012         |
| Other assets                  | 942,466            |
| <b>Total long-term assets</b> | <b>299,875,132</b> |

**TOTAL ASSETS** **\$315,910,900**

### LIABILITIES AND NET ASSETS

|                                       |                   |
|---------------------------------------|-------------------|
| Accounts payable and accrued expenses | \$9,447,900       |
| Notes payable                         | 4,628,105         |
| <b>Total current liabilities</b>      | <b>14,076,005</b> |

|  |                   |
|--|-------------------|
| Notes payable                          | 21,579,924        |
| Deferred obligations and planned gifts | 14,457,417        |
| <b>Total long-term liabilities</b>     | <b>36,037,341</b> |

**TOTAL LIABILITIES** **\$50,113,346**

Unrestricted net assets:

|                                   |                    |
|-----------------------------------|--------------------|
| Board designated                  | 127,938,833        |
| Undesignated                      | 79,234,709         |
| Temporarily restricted net assets | 51,417,301         |
| Permanently restricted net assets | 7,206,711          |
| <b>Total net assets</b>           | <b>265,797,554</b> |

**TOTAL LIABILITIES AND NET ASSETS** **\$315,910,900**

## STATEMENT OF ACTIVITIES\*

Year ended December 31, 2017

### OPERATING REVENUES

|                                      |                   |
|--------------------------------------|-------------------|
| Contributions:                       |                   |
| Individuals                          | \$65,170,659      |
| Foundations                          | 8,267,476         |
| Corporations                         | 3,749,390         |
| <b>Total operating contributions</b> | <b>77,187,526</b> |

|                                     |                   |
|-------------------------------------|-------------------|
| Investment withdrawal               | 10,780,013        |
| Program revenue                     | 247,084           |
| Rental and other income             | 3,359,360         |
| <b>Total other operating income</b> | <b>14,386,457</b> |

**Total Operating Revenues** **\$91,573,983**

### Operating Expenses

|                                |                   |
|--------------------------------|-------------------|
| Research                       | \$24,212,168      |
| Education                      | 27,782,221        |
| Media and government relations | 10,095,019        |
| <b>Total program services</b>  | <b>62,089,408</b> |

|                                  |                   |
|----------------------------------|-------------------|
| Fundraising                      | 15,023,738        |
| Management and general           | 2,643,692         |
| <b>Total supporting services</b> | <b>17,766,430</b> |

**TOTAL OPERATING EXPENSES** **\$79,756,838**

**NET GAIN FROM OPERATIONS** **\$11,817,145**

### NON-OPERATING ACTIVITIES

|                                     |              |
|-------------------------------------|--------------|
| + Restricted contributions          | \$10,117,999 |
| + Net investment Gain               | 30,710,640   |
| (-) Depreciation                    | 4,393,361    |
| (-) Interest expense                | 785,235      |
| (-) Investment withdrawal           | 10,780,013   |
| (-) Change in restricted net assets | 11,570,215   |

**TOTAL NON-OPERATING ACTIVITIES** **\$13,299,815**

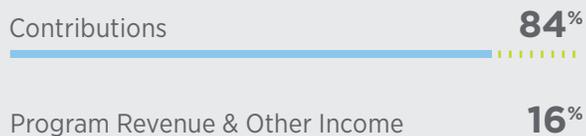
**CHANGE IN NET ASSETS** **\$25,116,960**

**NET ASSETS—Beginning of year** **\$240,680,594**

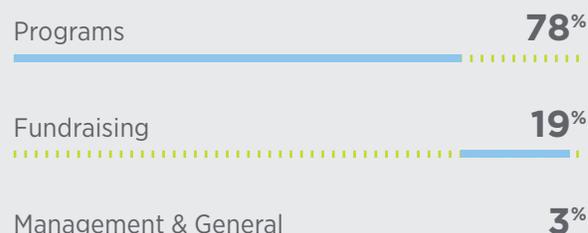
**NET ASSETS—End of year** **\$265,797,554**

\*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, 2018

## 2017 Operating Revenues



## 2017 Operating Expenses





*The Heritage Foundation Board of Trustees: (FROM LEFT) Anthony J. Saliba, Chicago, Ill.; Robert Pennington, Darien, Conn.; Larry P. Arnn, Hillsdale, Mich.; Brian Tracy, Solana Beach, Calif.; Edwin J. Feulner, Alexandria, Va.; Nersi Nazari, Atherton, Calif.; Thomas A. Saunders III, Chairman, Palm Beach, Fla.; Kay Coles James, Fairfax Station, Va.; Jerry Hume, San Francisco, Calif.; Mark A. Kolokotronis, La Canada, Calif.; J. William Middendorf II, Little Compton, R.I.; Barb Van Andel-Gaby, Vice Chairman, Duluth, Ga.; William L. Walton, Washington, Va.; Abby Moffat, Bethesda, Md.; Steve Forbes, New York, N.Y. (NOT PICTURED) Michael W. Gleba, Pittsburgh, Penn.; Ryan Haggerty, Fort Worth, Texas; Virginia Heckman, Atlanta, Ga.; Edwin Meese III, McLean, Va.; Rebekah A. Mercer, New York, N.Y.*

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**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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## What They're Saying About Heritage

... titans in the fight to defend, promote, and preserve our great American heritage.

—Donald Trump, Heritage Foundation President's Club meeting, Oct. 19, 2017

... a storied American institution, which currently holds the title of ... “Donald Trump’s favorite think tank.”

—Tevi Troy, *The Atlantic*, Dec. 19, 2017

... they absolutely have Trump’s ear.

—Jamiles Lartey, *The Guardian*, Nov. 22, 2017

It is no secret on where the Trump administration is getting their ideas. They are running a systematic playbook put together by The Heritage Foundation, a conservative think tank that has been around since the [1970s]. ... Their main office is just steps from the United States Capitol and the halls of Congress, where they wield unparalleled influence.

—Mustafa Santiago Ali, *The Guardian*, June 15, 2017

Up against the clock and with many senior staff positions still vacant, President Trump’s Office of Management and Budget turned to one of the nation’s most conservative think tanks—The Heritage Foundation—for inspiration. The result: The Trump budget proposal released last week bears a striking resemblance to The Heritage Foundation’s *Blueprint for Balance: A Federal Budget for 2017*, complete with a list of deep spending cuts designed to scale back the size and scope of the federal government.

—Steven Mufson, *The Washington Post*, March 27, 2017

## What They're Saying About Kay Coles James

Her background is formidable ... her vision is even more compelling.

—Syndicated Columnist Cal Thomas

Adding and multiplying almost sounds like a novel idea in politics lately. In Kay James, Heritage has picked someone who knows how that’s done.

—*Wall Street Journal* Editorial Board

A phenomenal choice from @Heritage—Kay Coles James will be an outstanding leader for the conservative movement in the months and years to come.

—Rep. Mark Meadows, R-N.C.

Congratulations to @KayColesJames. An outstanding leadership choice by @Heritage.

—Rep. Jim Jordan, R-Ohio

Kay is a smart, articulate leader who will motivate people toward positive ideas for individual freedom and opportunity for all!

—Former Va. Gov. George Allen

