



# PRINCIPLED LEADERSHIP IN A CHALLENGING WORLD

2019 ANNUAL  
REPORT

# Table of Contents

- Letter From the Chairman and President ..... **1**
- The Institute for Constitutional Government ..... **9**
- The Institute for Economic Freedom ..... **17**
- The Davis Institute for National Security and Foreign Policy ..... **23**
- The Institute for Family, Community, and Opportunity ..... **31**
- The Edwin J. Feulner Institute ..... **37**
- Heritage Action for America ..... **41**
- Policy Promotion ..... **47**
- Named Interns ..... **52**
- Government Relations ..... **55**
- Communications ..... **59**
- Named Fellows ..... **65**
- Distinguished Fellows ..... **66**
- Our Members ..... **69**
- Heritage Foundation Founders ..... **70**
- Heritage Foundation Associates ..... **73**
- Heritage Legacy Society ..... **78**
- 2019 Financial Statements ..... **82**
- Board of Trustees ..... **83**

The image shows the exterior of The Heritage Foundation building, a multi-story structure with a classical architectural style. The building features a series of tall, white columns and large windows. At the top of the building, two flagpoles are visible, one with the American flag and another with a blue flag. The sky is a clear, light blue. The text "Building an America where freedom, opportunity, prosperity, and civil society flourish." is overlaid in white on the building's facade.

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

THE HERITAGE FOUNDATION



Spreading the word: Heritage President Kay C. James delivers the keynote address to nearly 700 young African leaders attending the U.S. State Department's Mandela Washington Fellowship Summit in July. She spoke of the need for individual freedom, democracy, and free markets and the obligation to "work for the good of the people, not yourself."

## Letter From the Chairman and President

Washington seemed determined to tie itself in knots in 2019. The year started with the government shut down because of a budget impasse. It ended with a strictly partisan House vote to impeach the president.

Meanwhile, threats loomed around the world—from an increasingly aggressive China, an always-antagonistic Russia, and an ever-erratic North Korea, to name just three.

Such challenging times demand principled leadership, and The Heritage Foundation was there to provide it, with rock-solid policy recommendations grounded in rigorous research and the values that animated our nation's Founders. On Capitol Hill, in administration offices, and at the Supreme Court, our ideas not only were heard but also made a difference.

For the third year in a row, the University of Pennsylvania's Think Tanks and Civil Societies Program ranked Heritage the No. 1 think tank in the world for impact on public policy—no small feat when you consider that we were competing against more than 8,000 think tanks around the globe.

Why is Heritage so effective year after year? Part of the answer lies in the fact that we have world-class researchers.

Part of it is that we excel at getting that research to those who are in positions to turn our recommendations into reality. We regularly brief lawmakers, Cabinet secretaries—even the president and vice president. In 2019, our experts testified to Congress 33 times, and the White House invited us over to talk about immigration, health care, big tech, and Middle East peace.

But another key ingredient to our success is the fact that all of us at Heritage share a true passion for the mission and an extraordinary love for this country and her people.

Exactly how much impact did we have? Over the course of the year, our work profoundly influenced no fewer than 78 national policies via legislation, agency rules, and executive orders.

This report recounts many of those policy victories and introduces you to some of the people behind them. The following pages give you just a taste of what you'll find.

## MAJOR VICTORIES IN WASHINGTON

**Immigration Loopholes Closed.** Per our recommendations, the administration replaced “catch and release” with “catch and return” (sending asylum seekers back to Mexico to await their hearings), began denying asylum claims for those who passed through other countries without seeking asylum there, and ended the practice of family separation. The White House also drafted two immigration reform bills inspired by our recommendations.

**Qualified Judges Take the Bench.** Heritage educated Americans on constitutional originalism and on the qualifications of specific judicial nominees. Heritage’s online judicial tracker shows that more than 156 of the president’s judicial appointees have been confirmed.

**Federal Abortion Funding Pared Back.** The administration stripped tens of millions of taxpayer dollars from Planned Parenthood via the Title X program and worked with Heritage experts to craft new restrictions on federal funding for research that uses fetal tissue from elective abortions.

**Congress Said “No” to the Green New Deal.** Heritage did more than any other think tank to expose the unfeasibility and socialist aims of the failed Green New Deal.

**Military Rebuilding Continued.** The Senate’s 2020 National Defense Authorization Act adopted more than two-thirds of our recommendations for defense budgeting, modernization, and more. Meanwhile, the Marine Corps commandant and Army chief of staff began implementing forward-looking recommendations developed by Heritage researchers working on our landmark Rebuilding America’s Military Project.

**Pro-Growth U.S.-Mexico-Canada Trade Deal Reached.** We worked with the administration from day one to craft the United States–Mexico–Canada Agreement in ways that would strengthen protections for intellectual property rights, open up new markets, and continue the tariff-free treatment of many goods and services. Heritage experts played a major role in fine-tuning early drafts of the deal, which was signed into law Jan. 16, 2020.

## MAJOR VICTORIES ON THE WORLD STAGE

**The U.S. Withdrew From Several Disadvantageous Treaties.** For years, Heritage was the only think tank urging the U.S. to leave the Intermediate-Range Nuclear Forces Treaty and “unsign” the Arms Trade Treaty. In 2019, the administration announced it would do just that. It also served notice that the U.S. was withdrawing from the Paris Climate Accord—another win for common sense and the U.S. economy.

**Britain Gets a Pro-Brexit Prime Minister.** In the United Kingdom, Boris Johnson replaced Theresa May as prime minister. Shortly thereafter, he called for an early election—a de facto referendum on his pledge to withdraw the U.K. from the European Union—deal or no deal. His Conservative Party won a landslide victory. Heritage has long enjoyed a strong relationship with Johnson and his inner circle. We were the first U.S. think tank to call for Brexit and for a U.S.-U.K. free trade agreement—two pillars of Johnson’s platform.

## MAJOR VICTORIES IN STATEHOUSES

**Free Speech Protected on Campus.** Heritage helped create and publish model legislation that five states (Alabama, Arizona, Georgia, North Carolina, and Wisconsin) used to protect free speech on campus.

**School Choice Marched On.** Six states now have Education Savings Account (ESA) programs, and we are closer than ever to achieving a federal military ESA program—an idea pioneered at Heritage.

**“Cap and Trade” and Bailout Bills Blocked.** Working with local allies, Heritage helped kill a ruinous climate change bill in Oregon and a Pennsylvania proposal to keep a noncompetitive nuclear plant going with subsidies.

## INSTITUTIONAL MILESTONES

Heritage also achieved several institutional milestones in 2019. Among them:

**The Feulner Institute Took Flight.** In October, Heritage unveiled its fifth research institute. Named in honor of Heritage Founder Edwin J. Feulner, the new institute is charged



Executive Vice President Dr. Kim Holmes talks with Secretary of State Mike Pompeo at the 2019 President's Club Meeting in Washington, D.C.

with increasing knowledge of—and restoring confidence in—America’s founding values and principles. Its scholars, guest speakers, and outreach programs will reaffirm the sanctity and sovereignty of the individual, equality of opportunity, limited constitutional government, and economic freedom—and bring these ideas to new audiences.

**Judicial Clerkship Training Program Launched.** Our Meese Center for Legal and Judicial Studies convened the first-ever Federal Judicial Clerkship Training Academy—a two-day program for recent or soon-to-be law school graduates who have accepted federal clerkships. The groundbreaking program was designed to give freshly minted lawyers “tools not taught” in law school but ones that will help them “hit the ground running” and excel as clerks.

**Two New Member Events.** At our first-ever “campus fly-in,” Heritage members received issue briefings from Heritage experts and state-of-play updates on pending legislation from seven House and Senate members. Our annual President’s Club meeting featured a new Heritage Honors Gala celebrating all that is beautiful about our nation.

Among the featured speakers was Vice President Mike Pence, making his second appearance at a Heritage event in just two months.

**Our Young Leaders Program Turned 40.**

Heritage has now sent more than 4,500 nascent conservative leaders out into the world—all of them well versed in founding principles, able to identify “True North” on policy questions, and determined to stand up for what is right.

**LAYING THE FOUNDATIONS OF FUTURE SUCCESS**

To make sure Heritage remains the world’s most impactful think tank for generations to come, we vigorously pursued our three-year strategic plan throughout the year.

For example, we began a formal succession-planning process to strengthen our management team and ensure that future leadership transitions will be seamless.

Recognizing that policies are most often adopted when they have buy-in from the American people, we worked assiduously to broaden our outreach to new audiences and the media they

ERIN GRANZOW



Chairman Barb Van Andel-Gaby speaks at Heritage’s 2019 Annual Leadership Conference in California.

follow. During the year, we engaged in 581 meetings, briefings, and other relationship-building activities with non-traditional conservative audiences, from the Congressional Hispanic Leadership Institute to historically black colleges and universities. Outreach to non-conservative media outlets generated more than 3,000 articles and columns conveying our policy views.

Even as we broadened our reach at home, we were extending our reach globally. Throughout 2019, we met with world leaders, including the presidents of Estonia, France, Mongolia, and Taiwan, the Australian prime minister, and numerous ambassadors and foreign ministers. We hosted an African Ambassadors Dinner with over 20 ambassadors, welcomed diplomats from the member states of the Arab League, and convened a meeting with over a dozen Eastern European diplomats to promote the Three Seas Initiative.

Heritage has always been innovative, looking for new ways to advance our time-tested principles in an ever-changing world. We can’t afford not to. Technologies will continue to advance rapidly. American demographics and American culture will shift dramatically. To meet these challenges and turn them into opportunities, Heritage formed three Innovation Workshops in 2019.

Our Future of American Education team examined how best to counter the taxpayer-funded progressive revolution being taught in America’s classrooms. Our Future of Work team analyzed

how the digital and robotics revolution will affect the human workforce. And our American Exceptionalism and Culture team designed strategies to counter the Left’s takeover of our cultural, media, and corporate institutions and is designing strategies for a counteroffensive.

Forward thinking alone cannot keep Heritage a world-class institution. To carry out our mission, to constantly improve and innovate, requires adequate resources. We are happy to report that you, our members, once again gave us the support we needed. Indeed, our revenues reached a record high: \$120.5 million.

We are extremely grateful for your trust in us. And we hope that, as you read the following pages and reflect on all that we have accomplished together, you will be as proud as we are to be a part of The Heritage Foundation.

Sincerely,

**Barb Van Andel-Gaby**  
*Chairman*

**Kay C. James**  
*President*



DAVID HILLS, RYAN MERRILL PHOTOGRAPHY

# True North: The Principles of Conservatism

Heritage kicked off our 2019 President's Club meeting by unveiling "True North: The Principles of Conservatism." The set of 14 core principles is designed to unite the conservative movement.

"While good conservatives may have differing views on many issues, there are fundamental principles to which we all must hold fast," said President Kay C. James.

These principles, presented below, constitute a guide for building an America where freedom, opportunity, prosperity, and civil society flourish.

- 1 The federal government exists to preserve life, liberty, and property, and protect the sanctity of life; the freedom of speech, religion, the press, and assembly; the right to bear arms; equal and just treatment under the law; and the right to enjoy the fruits of one's labor.
- 2 The federal government's powers are limited to those named in the Constitution and should be exercised solely to protect the rights of its citizens.
- 3 Judges should interpret and apply our laws and the Constitution based on their original meaning, not upon judges' personal and political predispositions.
- 4 Individuals and families—not government—make the best decisions regarding their and their children's health, education, jobs, and welfare.
- 5 The family is the foundation of civil society, and traditional marriage is its cornerstone.
- 6 The federal deficit and debt must not place unreasonable financial burdens on future generations.

- 7 Tax policies should raise only the minimum revenue necessary.
- 8 America's economy and the prosperity of its citizens are best served by a system of free enterprise.
- 9 Regulations must not breach constitutional principles of limited government and the separation of powers.
- 10 America must be a welcoming nation—one that promotes patriotic assimilation and is governed by laws that are fair, humane, and enforced to protect its citizens.
- 11 Justice requires an efficient, fair, and effective criminal justice system.
- 12 International agreements and organizations should not infringe on Americans' constitutional rights or American sovereignty.
- 13 America is strongest when our policies protect our national interests, preserve our alliances of free peoples, counter threats to our security, and advance economic freedom.
- 14 The best way to ensure peace is through a strong national defense.

*The Heritage Foundation's policy recommendations are based on these principles and are not influenced by donations or outside political pressure.*





## Honors Given

1. Founder **Edwin J. Feulner** received the **Clare Boothe Luce Award**, Heritage's highest honor, at the 2019 President's Club Meeting. He also received the **2019 Leonard E. Read Distinguished Alumni Award** for "outstanding contributions to the causes of liberty and economic education" from the Foundation for Economic Education (FEE).
2. **Judge Edith Jones** of the U.S. Court of Appeals for the 5th Circuit received the **Defender of the Constitution Award** after giving the 2019 Joseph Story Distinguished Lecture at Heritage in October.
3. **Mollie Hemingway**, author, columnist, and political commentator, received the **Salvatori Prize for American Citizenship** from Kay C. James and David Azerrad at Heritage's 2019 Resource Bank in May.
4. **Charles Mitchell**, president and CEO of the Commonwealth Foundation for Public Policy Alternatives, received the **Robin and Jocelyn Martin Young Leaders Program Distinguished Intern Alumni Award** from Vice President Bridgett Wagner at the 2019 President's Club Meeting in October.



## In Memoriam

### TODD HERRICK, 1942-2019

Generous philanthropist and former Heritage board member, passionately dedicated to growing the conservative movement.

### DAVID KOCH, 1940-2019

Renowned philanthropist and friend of liberty.

### HAROLD SIEGEL, 1929-2019

Long-time Heritage supporter and chairman of our New York City Community Committee.

## Honors Received

President **Kay C. James** and Vice President **Angela Sailor** received an award for their work on **The White House Initiative for Historically Black Colleges and Universities**.

**James** also received the **Legacy Award from the U.S. Dream Academy**, a prominent youth mentorship organization. She was also named one of **“50 People Changing the Game in Washington”** by the National Journal.

Business Insider named Domestic Policy Studies Director **Marie Fishpaw** one of 34 **“health care power players”** shaping policy and politics in D.C.

Executive Vice President **Kim R. Holmes** was confirmed as a member of the **National Council on the Humanities**.

Vice President **John G. Malcolm**, our Gilbertson Senior Legal Fellow, was confirmed as a member of the **Legal Services Corporation’s board of directors**.

President Trump appointed **Paul Winfree**, our Richard F. Aster Fellow, to the **J. William Fulbright Foreign Scholarship Board**.

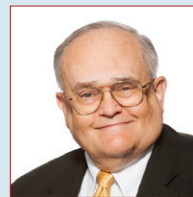
## 2019 Staff Awards

FROM THE RECEPTION DESK TO the boardroom, Heritage is blessed with amazing people. In 2019, we recognized four of our colleagues for their outstanding contributions toward making Heritage a best-in-class operation.



**JANINE RYAN**  
DIRECTOR, EVENTS

Recipient of the President’s Award for “striving to build an enduring organization and for excellence and unfailing devotion to the cause of freedom.”



**WILLIAM POOLE**  
SENIOR EDITOR

Recipient of the Drs. W. Glenn and Rita Ricardo Campbell Award for “outstanding contributions to the analysis and promotion of the free society.”



**KAITLYN WOOD**  
DIRECTOR, TALENT DEVELOPMENT AND COMPENSATION

Recipient of the Annie Hambleton Award for “unfailing devotion to duty, commitment to the ideals of The Heritage Foundation, and extraordinary courtesy to Heritage colleagues.”



**DAKOTA WOOD**  
SENIOR RESEARCH FELLOW, DEFENSE PROGRAMS

Recipient of the Joseph Shattan Award for “powerful writing that compellingly presents conservative ideas to policymakers and the American people.”



**Amy Swearer**

SENIOR LEGAL POLICY ANALYST

# The Institute for Constitutional Government

Throughout 2019, gun control advocates insisted that lawmakers “protect life” by enacting ever-more-stringent restrictions on the right to bear arms.

Often, they buttressed their emotion-laden arguments with false or misleading information. Experts in our Edwin Meese III Center for Legal and Judicial Studies resolved to make sure lawmakers—and the public at large—had accurate and complete information before reaching any decisions about pending legislation. At the forefront of that effort was Amy Swearer.

A senior legal policy analyst, Swearer’s specialty area is the Second Amendment and firearms policy. Writing extensively on the gun control debate, she produced a series of fact sheets and articles on topics ranging from mass shootings to red flag laws to the defensive use of firearms. She teamed with Vice President John Malcolm to produce a three-part series of essays exploring the intersections of mental illness, violence, and firearms.

Swearer also started writing a monthly column for The Daily Signal, Heritage’s multimedia news outlet. Each installment recaps 10 or more new incidents in which armed citizens have stopped criminal violence or neutralized threatening situations. Such “good guys save lives” stories are often ignored by liberal media outlets and are seldom mentioned by activists pushing gun control.

“Firearms can be used to carry out horrific acts of violence,” Swearer notes, “but the vast majority of gun owners will never use their firearms for unlawful purposes. In fact, lawful gun owners are much more likely to use their firearms for self-defense than criminals are to use firearms to harm innocent people.”

In August, not long after a deranged gunman killed 12 and injured four at a public works building in Virginia Beach, Swearer was called to testify before the Virginia State Crime Commission. She

opened her remarks by debunking the notion that America is gripped by a crisis of “gun violence.”

“Americans are safer today from violent crime—including firearm-related crime—than we have been at any point during my lifetime,” she stated. “And while the number of guns in this country has increased by about 50 percent since the early 1990s, the rate of homicide and gun-related homicide has fallen by about 50 percent.”

Swearer brought her reasoned approach to the gun debate to many national news outlets, from NPR and FOX Nation to the “Dr. Oz Show.” But her biggest appearance of the year came in September, when she testified before the House Judiciary Committee.

“Americans use firearms to defend themselves between 500,000 and 2 million times every year,” she informed the committee. “God forbid that my mother is ever faced with a scenario where she has to stop a threat to her life. But if she is, I hope politicians protected by professional armed security didn’t strip her of the right to use the firearm she can handle most competently.”

BlazeTV summarized the hearing this way: “Dems Sit in Silence as Witness Debunks Their ‘Assault’ Rifle Lies.” By year’s end, YouTube users had watched her opening statement well over 1 million times.

## FIGHTING TO PRESERVE ELECTION INTEGRITY

The Left is so invested in the “voter suppression” myth that the first bill produced by the liberal House majority was the inaptly named “For the People Act.” Though marketed as a measure to expand voting rights, strengthen ethics rules, and limit the influence of money in politics, the bill,



Heritage Senior Legal Fellow Hans von Spakovsky (right) testifies before the House Judiciary Committee in January on the dangers of a “reform” bill that would have inhibited political speech and undermined election integrity.

H.R. 1, would have actually made it easier to restrict political speech and commit election fraud.

The very day the bill was introduced, our Meese Center issued a fact sheet analyzing the real-world effects it would produce and briefed members of the House Freedom Caucus, the Republican Study Committee, and the House Republican Conference.

The head of our Election Law Reform Initiative, Hans von Spakovsky, later testified before the House Judiciary Committee about the problems the bill would create. He also spoke against it strongly in numerous radio and TV interviews.

When the bill came to the House floor, not a single Republican congressman voted for it, and Senate Majority Leader Mitch McConnell, R-Ky., steadfastly refused to move the bill in the upper chamber.

Even as the battle over H.R. 1 raged, we continued our long-standing campaign to ensure election integrity at the state level. In February, we held our annual all-day briefing for 25 state secretaries of state. Heritage legal scholars led

an in-depth discussion of issues, including voter fraud, redistricting, election security, and current election-related litigation and legislation.

Participants then hunkered down to map out strategies for advancing their shared goal of guaranteeing that every eligible individual is able to vote and that no one’s vote is stolen or diluted by fraudsters and ineligible voters.

The feedback from the secretaries of state was so positive that we plan to expand the program and offer a second briefing in July 2020.

Throughout the year, we continued to update our Election Fraud Database ([heritage.org/voter-fraud](https://heritage.org/voter-fraud)). It now contains more than 1,200 proven incidents of fraud, gleaned from news stories in local media, county court records, election boards, and state secretaries of state.

Increasingly, the database is helping advance election integrity in the courts. For example, the state of Ohio cited the database in its brief before the Supreme Court in *Husted v. A. Philip Randolph Institute*. The state wanted to ensure the accuracy

of its voter rolls by removing the names of those who had left the jurisdiction. The court ruled 5-4 that it could.

The database has become a popular resource for government officials, students, and activists interested in election integrity. And it continues to be cited regularly—in news reports, court opinions, and amicus briefs—to counter claims that voter fraud is a myth and that there is no reason to improve the integrity and security of the election process.

## SAVING THE ELECTORAL COLLEGE

The “national popular vote movement” gained momentum in 2019. By July, 15 states plus the District of Columbia had pledged to award their Electoral College votes (196 in total) to whatever presidential candidate gets the most votes nationwide, regardless of who wins their state.

This reveals a shameful ignorance, even among lawmakers, of basic civics and the function and benefits of the Electoral College. In response, Heritage has taken up the challenge of educating the public and lawmakers on the importance of preserving the Electoral College.

In media interviews, commentaries, and speeches, the Meese Center’s Hans von Spakovsky, John York, and Elizabeth Slattery spread the word about how the Electoral College serves to represent the interests of the nation at large and protect against “a tyranny of the majority.”

In November, we hosted a panel discussion, “The Fight to Preserve the Electoral College,” as part of the Meese Center’s popular Preserve the Constitution lecture series.

Heritage is firmly committed to this fight. We plan to expand our footprint in this area, especially in the states, in 2020.

## RESTORING REASON TO REGULATION

The Meese Center has been the leading advocate for making maximum use of the Congressional Review Act to quash ill-advised regulations. Our arguments continued to gain traction within the Trump administration.

In April, the Office of Management and Budget officially agreed with our broad interpretation of



Berkeley School of Law professor John Yoo speaks at Heritage’s Preserve the Constitution event titled, “Court, Heel Thyself.”

## A Decade of Preserving the Constitution

HERITAGE CELEBRATED THE 10<sup>TH</sup> anniversary of our Preserve the Constitution lecture series in 2019. The series offers leading authorities on law and public policy a prominent platform to raise awareness of the need to restore the courts to their proper constitutional role and enforce the constitutional limits on government.

This year’s seven lectures and seminars covered topics ranging from protecting religious liberty to preserving the Electoral College. Featured speakers included Assistant Attorney General Eric S. Dreiband, former Solicitor General Paul D. Clement, and Berkeley School of Law professor John C. Yoo.



5th U.S. Circuit Court of Appeals Judge Edith H. Jones delivers the 2019 Joseph Story Distinguished Lecture, “Playing the Judicial Long Game—How Long Is Enough?” She also received Heritage’s Defender of the Constitution Award at the Oct. 16 event.

## New in '19: The Federal Judicial Clerkship Training Academy

### BROADENING OUR EFFORTS TO HELP

build a principled, efficient judiciary, the Meese Center convened its inaugural Federal Judicial Clerkship Training Academy on Feb. 19. The two-day program drew 39 recent or soon-to-be law school graduates who had accepted federal clerkships beginning in 2019.

Offered as a service to the judiciary, Vice President John Malcolm said the program's goal was to give incoming law clerks "tools that they likely did not learn in law school but will enable them to hit the ground running and excel" as clerks.

Faculty for the academy included judges sitting on U.S. Circuit Courts of Appeals, professors from prominent law schools, and well-known legal practitioners. Topics covered ranged from "Court Jurisdiction: Standing, Ripeness, Mootness, Justiciability, and Abstention" to "Textualism and Canons of Statutory Construction."

Participants gave the workshop rave reviews, and the positive word-of-mouth created tremendous demand. As a result, the 2020 class will be 20% bigger.



The inaugural Federal Judicial Clerkship Training Academy's graduating class. These young lawyers are now prepared to serve their judges well.

the act. It issued a memorandum to the heads of all executive branch departments and agencies, advising them that they must henceforth follow the more "expansive" legal definitions of what rules must be submitted for congressional review before taking effect.

Going a step further, President Donald Trump issued two executive orders regarding "guidance" documents issues by federal agencies. In the Obama era, agencies sometimes eschewed promulgating regulations (which would be subject to congressional review) in favor of issuing guidance documents. It was clear that those who ignored the often controversial "guidance" would risk losing federal grants or contracts.

Trump's executive orders mirrored the language of several articles by our Rumpel Senior Legal Research Fellow Paul Larkin, particularly his essay on "The Value of Nullifying Agency Guidance Documents via the Congressional Review Act," published in the University of Pennsylvania's *Regulatory Review*.

The Meese Center's influence on the judiciary was also evident. For instance, in his concurring opinion for *Kisor v. Wilkie*, the most significant administrative law case in the Supreme Court's last term, Justice Neil Gorsuch quoted—in three places—"The World After Seminole Rock and Auer," an article by Larkin and Slattery published in the *Harvard Journal of Law and Public Policy*.

Throughout the year, the Meese Center hosted bimonthly meetings of the Regulatory Reform Working Group. These sessions have long enjoyed regular attendance from Capitol Hill staff, academic centers, public interest groups, and trade associations interested in taming the regulatory beast.

In 2019, the meetings became something more: a venue in which the administration felt free to exchange ideas with experts and practitioners. Among those giving policy presentations this year were representatives from the White House Counsel's Office, the Department of Transportation, the Office of Management and Budget, the Office of Information and Regulatory Affairs, the Federal Trade Commission, the Federal Communications Commission, and the Consumer Financial Protection Bureau.



The Heritage Judicial Tracker ([heritage.org/judicialtracker](https://heritage.org/judicialtracker)) has come to be relied upon by media organizations and members of Congress of all political stripes.

## STEERING THE JUDICIARY BACK TO CONSTITUTIONALISM

Surveying the federal judiciary at year’s end, fans of constitutional governance find much to cheer. In the words of Cornell University law professor William Jacobson, it’s a “seismic shift in the composition of the federal judiciary ... a legacy that will last a generation.”

In 2019, the Senate confirmed 102 constitutionalist judges to life-tenured federal courts. It was the second-highest number of appointments in a single year, through all of American history. Of those appointments, 80 were confirmed to the U.S. Court of Appeals, 20 to the U.S. District Court, and two to the U.S. Court of International Trade.

Overall, judicial vacancies have declined by 31% since President Trump took office—a remarkable achievement considering the unprecedented obstructionism his nominations have encountered.

The Meese Center played a huge role in overcoming this opposition. In addition to recommending unassailably solid candidates for lower court vacancies, our legal experts wrote extensively on the need to fill vacancies and confirm nominees expeditiously.

We also called out the obstructionist tactics that were needlessly delaying confirmations and

the delivery of justice. Deputy Director Thomas Jipping was a one-man army on this issue, penning more than 50 hard-hitting commentaries and giving well over 100 media interviews on the topic.

Of course, all of this resulted in quite a lot of activity for Heritage’s Judicial Tracker, a website that tracks current and historic data about the judicial appointment process ([heritage.org/judicialtracker](https://heritage.org/judicialtracker)). The chief nominations counsels for Senate Judiciary Chairman Lindsey Graham, R-S.C., and Majority Leader Mitch McConnell have come to rely on the tracker, and it was cited in several Senate floor speeches during 2019.

Even left-leaning news outlets such as NPR and MSNBC and liberal organizations such as the National Constitution Center are now citing the tracker. Clearly, it has become a bipartisan resource, one upon which both the Right and the Left can rely.

The Meese Center hosted 19 moot court sessions to help prepare oral advocates in cases before the Supreme Court and organized 29 conferences to coordinate “friend-of-the-court” briefs. Its scholars published 12 law review articles, wrote 28 major research papers, testified before Congress or state legislatures seven times, participated in 106 speeches and debates, and made 1,257 media appearances. 📌





Edwin J. Meese III, Heritage's Ronald Reagan distinguished fellow emeritus, was awarded the Presidential Medal of Freedom by President Trump in an October ceremony at the White House.

## Founding Father of Originalism

**IN 1985, EDWIN J. MEESE III, THE** 75th U.S. attorney general, did something no attorney general had done since the days of FDR: he questioned how the Constitution ought to be interpreted and asserted that the executive branch had a legitimate role to play in “shaping the form of jurisprudence.”

With that one speech, Meese started an important national debate about the proper application of our most important governing document—the U.S. Constitution. His goal was to persuade judges, even Supreme Court justices, to agree that they should respect the text of the Constitution and the intent of the Founders who wrote it.

Meese was quite clear about the issue. The Supreme Court had engaged in too much policymaking in its latest term, he declared. Rather than show “deference to what the Constitution—its text and intonation—may demand,” far too many of the court’s opinions were “more policy choices than articulations of long-term constitutional principles.”

The remedy, he said, was for the court to employ a “Jurisprudence of Original Intention,” a return to the intent of the authors of the Constitution and the Bill of Rights.

With that speech and two others that followed, Meese was the first attorney general since Robert Jackson (under President Franklin D. Roosevelt) to question how the Constitution ought to be interpreted and to recognize there is a role for the executive branch in “shaping the form of jurisprudence.”

Meese was not a revolutionary but an apostle of ordered liberty. The “Great Debate” that he started 35 years ago has fundamentally altered the constitutional landscape of our nation for the better.

On Oct. 8, Meese’s lifetime of service to his country was recognized when President Donald Trump awarded him the nation’s highest civilian honor, the Presidential Medal of Freedom.

In presenting the award, the president said: “For nearly half a century, [The Heritage Foundation] have been titans in the fight to defend, promote, and preserve our great American heritage. Few people have worked harder to protect this heritage than Ed Meese, a fearless defender of our Constitution.”

To that, we, his colleagues and fervent admirers at Heritage, can say only, “amen.”

# Heritage by the Numbers in 2019



**12**  
Special Reports published



**83**  
Backgrounders published



**1,823**  
Commentaries placed in major print/online publications



**727,600**  
Heritage Twitter followers



**17**  
Legal Memoranda published



**93**  
Issue Briefs published



**3,098**  
Radio interviews conducted



**3.1 million**  
Facebook fans



**21**  
Regional donor events held



**159**  
Public programs conducted



**303,000**  
Subscribers to The Agenda, Heritage's weekly email



**45 million**  
Heritage and Daily Signal website visits



**33**  
Congressional testimonies delivered



**1,797**  
Television interviews conducted



**405,000**  
Subscribers to The Daily Signal's Morning Bell email



**70.9 million**  
Video views



**No. 1 Think Tank**  
with the Most Significant Impact on Public Policy for three consecutive years



**More than a half-million members**  
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## Nicolas Loris

DEPUTY DIRECTOR, THOMAS A. ROE INSTITUTE FOR ECONOMIC  
POLICY STUDIES, HERBERT AND JOYCE MORGAN FELLOW

# The Institute for Economic Freedom

When New York Rep. Alexandria Ocasio-Cortez unveiled her “Green New Deal,” many conservatives simply scoffed at its unrealistic ambitions. Not Nicolas Loris.

He knew that even the most outlandish proposals eventually become “mainstream” if left unchallenged.

The deputy director of our Thomas A. Roe Institute for Economic Policy Studies, Loris spent much of 2019 combating the Left’s climate agenda. Working with Kevin Dayaratna, the senior statistician of our Center for Data Analysis, Loris determined that, by 2040, the Green New Deal would cost us more than \$3.9 trillion in GDP, more than 1.4 million jobs, and \$40,000 in family income, while also sharply increasing electricity costs.

In return, the American people would get virtually nothing. In Loris’ words, “Even by the end of the century, the ‘deal’ would make no discernible difference in global warming.” Worse, he argued, “it would leave us *less* equipped to deal with actual climate-related problems, with fewer resources to mitigate risks from extreme weather.”

Loris spread the word about his findings, testifying before four different congressional committees, conducting more than 20 congressional staff briefings, publishing more than 50 op-eds, and appearing on scores of radio and TV news programs.

Dayaratna also testified on this issue, in state committee hearings as well as on Capitol Hill. His testimony in Oregon contributed to the demise of a “cap and trade” proposal there.

Back in D.C., Loris’ work earned admiration at 1600 Pennsylvania Ave. In July, the White House invited him to attend President Donald Trump’s major policy address outlining his vision of responsible leadership and environmental stewardship.

In November, Loris got more good news from the administration when Secretary of State Mike Pompeo gave the U.N. formal notification that

the U.S. was pulling out of the 2015 Paris climate agreement. Loris had campaigned against the pact since its inception, exposing its many flaws and explaining why it was doomed to fail—an unworkable “non-solution” that would succeed only in lowering living standards around the world. The withdrawal will be complete Nov. 4, 2020.

## DEFENDING CAPITALISM AND FREE MARKETS

The progressive agenda doesn’t stop with the Green New Deal. Last year saw many liberal leaders openly embrace socialism and blithely propose \$40 trillion spending plans. The need to defend America’s economic prosperity has never been more urgent.

One of those to answer the call was Roe Institute Senior Fellow David Burton. He penned a remarkable Backgrounder titled, “It Is Arithmetically Impossible to Fund the Progressive Agenda by Taxing the Rich.” That report was picked up by Fox Business, Newsmax, The Washington Times, and many other outlets. Syndicated radio host Mark Levin even read Burton’s irrefutable findings on the air.

With a 17-part lecture series titled, “Free Markets: The Ethical Economic Choice,” Burton also systematically rebutted the notion that socialism is morally superior to free market capitalism. Among the speakers were Georgetown University’s Randy Barnett (“The Constitution and Economic Freedom”), Wake Forest University’s James Otteson (“Justice vs. Social Justice”), and McDonough School of Business’ Jason Brennan (“Fake Socialism vs. Real Capitalism”). Burton himself contributed a lecture, “Economic Equality Is Unjust.” All 17 speeches will be compiled in a book to be published in 2020.

## “Essential Reading” From Heritage



**PAUL WINFREE** is used to pulling double duty. In 2017, he served at the White House as both director of budget policy and deputy director of

the Domestic Policy Council.

Now back at Heritage, he’s serving as both our Richard F. Aster fellow and director of the Thomas A. Roe Institute for Economic Policy Studies.

Still, Winfree found time to write *A History (and Future) of the Budget Process in the United States: Budget by Fire*. Published in the fall, the book traces the evolution of the federal budget process—from the Founding to today.

It’s a sad story. Winfree documents the breakdown of the process and how it has led to rampant overspending. But the book also provides hope in the form of practical, concrete reforms to restore fiscal sanity.

The book was even distributed to the entire Office of Management and Budget staff and won plenty of praise, with one scholar calling it “a feat of remarkable scholarship.” Already it is being used at top universities across the country—a go-to resource for academics as well as public policy professionals.

“Winfree shows us how we went from a nation where fiscal responsibility was the norm to one with trillion-dollar deficits,” wrote Kevin Kosar of the R Street Institute. “This book is essential reading for policymakers who seek to get our country out of this mess.”

Our Institute for Economic Freedom fought a year-long battle debunking the Left’s false narrative that lower taxes and deregulation serve only to “line the pockets of the rich at the expense of the poor.”

So, for example, when CBS News ran a story claiming “middle-class Americans are falling behind” because of the 2017 tax cuts, Distinguished Visiting Fellow Stephen Moore dug into the data. He found that real median household incomes had shot up by more than \$5,000 since January 2017—*five times* the increase logged during the previous administration.

Reporting these findings in his nationally syndicated column, Moore argued convincingly that the tax cuts and regulatory rollback have helped turbocharge household incomes for the vast majority of Americans. “It’s a middle-class boom,” he proclaimed.

Indeed, he noted, the economy as a whole was performing far better than the “experts” predicted. Before 2017, for example, the Congressional Budget Office predicted net job growth of no more than 2 million from 2017 through 2019. The actual result: 7 million.

## SHEDDING NEEDLESS REGULATIONS

Heritage continued to make progress in our fight to eliminate unnecessary regulation. Senior Research Fellow Daren Bakst published a commentary on the Environmental Protection Agency’s secondary benefits rule, arguing that the agency should make sure its regulatory proposals do more good than harm.

That common-sense recommendation struck a chord with EPA Administrator Andrew Wheeler. He subsequently issued a memorandum directing four of the agency’s policy offices to make sure that, in the future, they address cost-benefit analyses used in their rule-making process.

In mid-August, Bakst scored again—this time in court. A federal district court judge ruled that the Obama administration’s Waters of the U.S. rule violated both the Clean Water Act and the Administrative Procedure Act. With encouragement from Bakst and others, the Trump administration had already declared its intent to withdraw

the rule. Two weeks after the court decision, the rule was gone.

The EPA also withdrew the Obama administration's preemptive rejection of the Pebble Mine project—a prospective gold and copper mining operation in Alaska. For years, Heritage had urged the agency to obey the law—i.e., wait until it got an actual mining proposal—and then follow the environmental review process—*before* deciding whether or not mining could begin.

In another welcome reversal, the Department of Energy withdrew Obama-era energy efficiency mandates for certain light bulbs—a decision long advocated by Heritage. The mandates would have been a de facto ban on incandescent bulbs. Now, however, consumers are once again free to choose the type of lighting they want, rather than have their options artificially restricted by government fiat.

Senior Research Fellow James Gattuso also made a difference on the regulatory front. The Federal Railroad Administration wanted to ban one-person train crews. Gattuso argued that technological advances now make it possible to run freight trains safely with only one person on board.

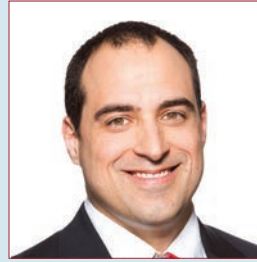
His Issue Brief critical of a proposed regulation governing the size of railroad crews was circulated widely within the railroading community. In late May, the agency withdrew the proposal, opening the way to lower transportation costs for America's farmers, miners, and steelworkers.

## CRAFTING REAL BUDGET REFORMS

Heritage's influence was also evident in President Trump's budget proposal. It included a discussion and analysis of the 24 largest tax expenditures under a consumption tax baseline. Heritage had recommended that in the previous year's *Blueprint for Balance* and reiterated the utility of such a discussion as part of a brief we had submitted to Office of Management and Budget Acting Director Russ Vought (an alumnus of Heritage Action).

Following up on one of the *Blueprint's* recommendations, our Grover M. Hermann Center for the Federal Budget, a specialty center within our Roe Institute, argued strenuously against

## R.I.P. QM



**JULY 25 WAS A** banner day for Dr. Norbert Michel. That's when the Consumer Financial Protection Bureau announced that it would let the

"qualified mortgage patch" expire.

Michel, director of our Center for Data Analysis, had campaigned to "pull the plug on the patch" since 2014. The policy actually incentivized risky lending, allowing lenders to give government-backed mortgage loans to borrowers who couldn't really afford them—precisely what led to the 2008 housing market meltdown that precipitated the Great Recession.

With the patch gone, taxpayers are off the hook for high-risk housing loans backed by Fannie Mae and Freddie Mac.



Senior Research Fellow Daren Bakst outlines common-sense reforms to farm subsidy programs at a June 11 event.

extending some 30 supposedly temporary tax subsidies in the spending package.

Initially dropped from the package, the extenders were slipped back in at the last minute—but in a less egregious form. The good news: Our research helped keep the existing credits from being expanded, and the extensions are short, lasting only through 2020. That creates an opportunity for us to fight again—and win—next year.

Like its predecessor, the 2019 *Blueprint for Balance* (for FY 2020) recommended reforms for virtually every federal department and every program, from Social Security to health care. It would cut federal outlays by \$9.9 trillion over a decade, resulting in a balanced budget by 2029, if not earlier, while protecting our nation’s most vulnerable citizens.

In May, the Republican Study Committee’s FY 2020 budget proposal embraced 132 of the *Blueprint’s* more than 250 reforms, including 23 of 32 significant changes to entitlement programs.

That same quarter, Republican Sens. Mitt Romney (Utah), Mike Lee (Utah), Mike Braun (Ind.), and Pat Toomey (Pa.) introduced the Budgeting for Disasters Act. The act would codify the *Blueprint’s* recommendation that future disaster and wildfire relief funding fall within statutory budget caps.

Two of the Hermann Center’s recommendations to expand individuals’ access to funds in their retirement savings accounts—including early 401k withdrawals for Paid Family Leave—were included in the Secure Act passed by the House.

Just eight days into 2019, the center made waves in Washington when Sen. Braun introduced S.39, the No Budget, No Pay Act. The bill reflects a “hit ‘em where it hurts” policy proposal developed by Director Romina Boccia. Specifically, it states that “Members of Congress may not receive pay after October 1 of any fiscal year in which Congress has not approved a concurrent resolution

on the budget and passed the regular appropriations bills.”

Inspired by another Hermann Center proposal, Rep. Kevin Brady, R-Tex., and Indiana Republican Sens. Braun and Todd Young introduced the Maximizing America’s Prosperity Act. The bill would cap federal spending, then require Congress to cut any spending above those caps. Boccia modelled her recommendation after a Swiss law that has proved a remarkably effective brake on the country’s federal expenditures.

## MOVING THE TECHNOLOGY FORWARD

Our Center for Data Analysis continued to advance the art of economic computer modelling. Its groundbreaking analysis of the Green New Deal took the wind out of the sails of that socialist pipe dream.

The center also perfected a macro-simulation model that allows it to do a “dynamic” assessment of tax and spending proposals. The dynamic analysis showed that the reduced spending proposals outlined in our *Blueprint for Balance* would actually balance the federal budget four years earlier than predicted by old-school “static” analysis.

Our micro-simulation model for personal taxes helped push along the 2017 tax cuts by demonstrating just how much the constituents of every congressional district stood to gain. In 2019, the center completed a new micro-model for corporate taxes. No other think tank has a model this advanced. It will allow us to provide lawmakers with much richer analyses of corporate tax changes in areas such as expensing and asset depreciation.

The Center for Data Analysis also completed a new model to estimate the budgetary effects of allowing Universal Savings Accounts—an innovation Heritage has recommended to boost personal savings. 🏠



For legislators with ears to hear and eyes to see, [T]he Heritage Foundation this week published its “Blueprint for Balance,” an annual analysis pointing to where budgeters can find savings to reduce waste, duplication and fraud.

—WASHINGTON TIMES EDITORIAL,  
MAY 23, 2019

# Making a Difference on the Home Front, Too

## SOME PEOPLE MAKE A DIFFERENCE

in their hometowns. Some move policy in Washington or on the international stage. In 2019, Rachel Greszler had success in all three arenas.

A research fellow in our Hermann Center, Greszler continued to proclaim the dangers of having the federal government bail out private union pension plans that have overpromised benefits to the tune of \$638 billion. In June, the House passed a measure to give the insolvent, multiemployer plans taxpayer money to cover their shortfalls and additional money to invest in the stock market.

The issue grew even more complicated when liberals tried to tie the mega-bailout to the U.S.-Mexico-Canada trade pact.

Greszler didn't give up. She doubled down. Virtually the only expert raising the alarm on this issue, she met regularly with House and Senate offices—and with administration officials—to introduce them to better policy alternatives, while also testifying before Congress and writing more than a dozen reports and articles.

Rather than use taxpayer money to play the market and reward reckless plans, she argued, Congress should protect both pensioners and taxpayers by preventing multiemployer plans from making promises they can't keep and giving plan fund managers tools to minimize pension losses.

Ultimately, White House trade negotiators were able to keep a large-scale bailout out of the international deal. And while the year-end spending deal reached by Congress included a bailout for coal miners, the damage was much less than what the House had approved back in July.



Rachel Greszler testifying before Congress in May.

Busy as she was on Capitol Hill, Greszler still found time to make a difference in her own backyard. A resident of Montgomery County, Maryland, Greszler was an enthusiastic backer of a local zoning proposal designed to increase affordable housing options. She took up her pen.

The day before the bill came to a vote, *The Washington Post* published her commentary urging the county council to approve the measure, which would allow more single-family homeowners to build basement or garage apartments on their property.

The county's existing zoning laws, she noted, were needlessly restrictive, "just a less ostentatious form of economic segregation."

After reading her column, Councilman Hans Riemer, the sponsor of the bill, distributed copies to every council member before the vote—after first dashing off a thank-you note to Greszler.

The council wound up voting unanimously to adopt the bill—a victory for both property rights and dedication to community.





**Ana Quintana**

SENIOR POLICY ANALYST FOR LATIN AMERICAN AFFAIRS

# The Davis Institute for National Security and Foreign Policy

A first-generation American of Cuban descent, Ana Quintana was raised with a keen appreciation of freedom and democracy.

Armed with a bachelor's degree in political science and a master's in global security studies, she landed her first "real job" at the Defense Department, honing her skills as an analyst of Latin American affairs.

Her desire to shift from pure analysis to policy development led her to Heritage in 2013. "I wanted a place that shared my values and that went beyond just trying to explain problems to actively advancing policies that will fix the problems." Our Allison Center for Foreign Policy proved to be the perfect match for Quintana—and 2019 was her most eventful year yet.

As our senior policy analyst for Latin American affairs, she continued working to unspool the former administration's dalliance with Havana—what Quintana calls "Obama's bid to normalize relations with an abnormal regime." She also campaigned tirelessly to increase international pressure on Nicolas Maduro's brutal and illegal regime in Venezuela, even travelling as far as Berlin to address the German Foreign Ministry's first-ever Latin America Conference.

Back in D.C., she hosted a series of meetings for El Salvador's President-elect Nayib Bukele. His first public speech in the U.S. drew a standing-room-only crowd to our Allison Auditorium.

"The crowd was amazing and so was its diversity," Quintana recalls. "Elected officials, diplomats, business executives, members of the Salvadoran diaspora from as far away as Massachusetts—even construction workers from a couple of floors below—all came to hear this incredible man, a successful third-party candidate determined to unite a country still reeling from decades of civil war."

Yet, it was U.S.-Mexico relations that received most of Quintana's attention in 2019. The year

began with a new, leftist president taking office, a "new NAFTA" trade deal in doubt, predatory criminal cartels wreaking havoc, and an increasingly porous border. Quintana faced no shortage of challenges. But she didn't have to face them alone.

"One of the best things about working at Heritage—one of our greatest strengths—is that whenever you're dealing with something really important, every department treats it as important, too," she notes.

"So, on something like immigration reform, it's not just me or just the Davis Institute working on it. It's our Legal Center; it's the Roe Institute; it's Domestic Policy; it's Policy Promotion and Communications and Government Relations. The whole atmosphere is extremely collegial, supportive, and energizing," she adds.

It's also extremely effective.

## WINNING THE BATTLE AT THE BORDER

In late 2018 and early 2019, massive "caravans" of immigrants turned our long-standing border crisis into a full-blown emergency.

Heritage responded with a special report: "An Agenda for American Immigration Reform." A humane blueprint for fixing our broken immigration system in a way that keeps America free, safe, and prosperous, it was welcomed by the administration.

Within months, the White House was putting our recommendations into practice. For example, it started enforcing the long-ignored "public charge" provision, which can deny admission to the U.S. of those likely to rely on public benefits.

It also replaced the Obama-era "catch and release" policy with a "remain in Mexico" policy. Now, instead of being released into the U.S.



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1. The Asian Studies Center hosted a historic video conference featuring the president of Taiwan, in addition to private events that included an annual U.S.–Republic of Korea Dialogue.
2. Kiron Skinner, a former senior advisor to Secretary of State Mike Pompeo, joined Heritage as a visiting fellow in September and makes frequent appearances on Fox News.
3. Olivia Enos travelled to Hanoi for the second Trump–Kim summit. She became a media sensation, doing 16 TV interviews and 18 print interviews while on site.
4. Sen. Dan Sullivan, R-Alaska, delivered the annual B.C. Lee Lecture. This year’s topic: “America’s Indo-Pacific Policy: Prospects During a Critical Time of Change.”



At the President’s Club Meeting, current and former homeland security officials Ken Cuccinelli, Mark Morgan, and Tom Homan thanked Heritage for our guidance and support in closing loopholes in the dysfunctional immigration system.

while awaiting an asylum hearing, captured illegal immigrants are sent back across the border to await their day in court.

This basic reform had a profound impact. By year’s end, border apprehensions had plummeted 78% from May levels. The number of families caught crossing illegally plunged from 84,486 to just 9,000. As the El Paso Times put it, “The policy has proved to be a virtual wall.”

Also in keeping with our recommendations, the administration began denying asylum to those who had crossed another country without seeking asylum there first. And it struck deals with Central American countries that let the U.S. return asylum seekers to El Salvador, Guatemala, and Honduras.

To make sure these reforms “stuck,” the White House pressured our southern neighbors with loss of aid if they continued to ignore their obligations regarding border security and providing asylum. These Heritage-backed policies effectively put an end to the migrant caravans.

Heritage’s solutions promise to influence future debates, as well. Our ideas inspired the administration to develop two legislative proposals—one

dealing with legal immigration reform, the other on border enforcement—which it plans to introduce in 2020. Heritage experts advised on the drafting of both measures.

## REBUILDING OUR MILITARY THE RIGHT WAY

For years, Washington has asked our fighting men and women to do more with less. The result: a shrinking, aging military.

Since 2015, Heritage’s Center for National Defense has published an annual *Index of U.S. Military Strength* analyzing how our armed forces stack up against the threats they face now and in the foreseeable future. Our latest report found the relative strength of each service branch ranged from marginal at best to weak at worst.

The unflinching assessment garnered significant media attention from outlets such as Bloomberg, The Hill, Politico, and C-SPAN, delivering a loud wake-up call about the need to rebuild our forces.

Rebuilding requires adequate funding, of course. And that’s largely contingent on what the annual National Defense Authorization Act (NDAA) says.



Executive Vice President Kim Holmes at the American launch of the *2019 Index of Economic Freedom*.

## CITE Hits the Road

OUR CENTER FOR INTERNATIONAL Trade and Economics launched the silver anniversary edition of the *Index of Economic Freedom* with a public event featuring presentations by Heritage President Kay C. James, Executive Vice President Kim Holmes, and CITE Director Terry Miller. But that was just the first in what was a global rollout of the publication.

The CITE team hosted Index events in Hong Kong, Seoul, Taiwan—even Beijing. In Europe, they discussed their findings in Austria, Azerbaijan, Denmark, Georgia, Germany, Slovakia, Spain, Sweden, and Switzerland. The South American tour included stops in Colombia, Ecuador, and Paraguay.

Every step of the way, they met with government officials, academics, and (where available) free-market think tanks to discuss policies that would help countries move forward on the march to economic freedom.

And the world took notice. By year's end, the online version of the Index had logged 7.7 million page views, making it our most-viewed publication for all of 2019.

For months, it looked like Congress might not even be able to pass an NDAA for FY 2020. That's when Defense Budgeting Analyst Frederico Bartels published "Building an NDAA That Strengthens America's Military," a report offering guidance on how to refine the proposals then pending before the House and Senate.

Finally, in December, lawmakers passed the authorization. Heritage's influence was evident throughout. The final bill adopted, in whole or in part, 39 of Heritage's 57 recommendations. It was, Bartels said, "a good step forward in rebuilding our military."

But in what way should the military be rebuilt? And for what purpose?

To answer both questions, our Center for National Defense launched its Rebuild America's Military Project (RAMP), a series of reports analyzing what each military branch will need to fulfill its mission into the foreseeable future.

The first report, analyzing the Marine Corps, recommended returning the corps to its original purpose as a sea-to-land force—a critical shift largely driven by China's rising threat in the Indo-Pacific. That report was read closely by Gen. David Berger, who became the U.S. Marine Corps' 38th commandant in July. Shortly after taking his new command, Berger issued a planning guidance document that echoed every major point made in our report.

The second RAMP report, released in August, focused on the Army. Written by Director Thomas W. Spoehr, a retired lieutenant general, the report stressed the need to concentrate on solving the Army's own unique operational and tactical problems rather than trying to match our adversaries' military capabilities. It also urged planners to remain flexible and eschew "groupthink."

Center experts briefed Army Chief of Staff Gen. James C. McConville on the report, and, thanks to its influence, the Army now intends to revamp its modernization efforts.

Both reports gained significant attention among mainstream media as well as defense publications such as Marine Corps Times, Military.com, Task and Purpose, and RealClearDefense. We will release RAMP reports on the Navy and Air Force in 2020.



Left: Senior Research Fellow JV Venable hosts a conversation about military modernization with Secretary of the Air Force Barbara M. Barrett. Right: Kay C. James and Kim Holmes welcome Estonian President Kersti Kaljulaid and Jonatan Vseviiov, the ambassador of Estonia to the U.S., prior to a roundtable discussion hosted by our Thatcher Center.



## EXITING BAD TREATIES AND BREXIT-ING FOR GOOD

In May, President Donald Trump announced the U.S. would be “unsigning” the Arms Trade Treaty. It was a major win for Heritage.

The feel-good treaty was supposed to regulate transnational sales of everything from small arms to battle tanks and warships. In practice, the Obama-era pact was ignored by the bad guys—just as Heritage had predicted from Day One.

For Ted Bromund, a senior research fellow in our Margaret Thatcher Center for Freedom, the administration’s decision marked the successful conclusion of a nearly decade-long campaign. Bromund first entered the fray in August 2009 with a research paper decrying the not-yet-finalized treaty as “a dangerous multilateral mistake in the making.”

In the following years, he published more than 200 additional reports, op-eds, scholarly articles, and lectures—all exposing the flaws and dangers of the treaty. Time after time, he carried his message into the very belly of the transnational beast, attending the Arms Trade Treaty conferences in 2012, 2013, 2015, and 2018 and even making two addresses at the United Nations.

While the international set remained unmoved, Bromund found a far more interested audience

in the Trump administration. The White House statement announcing U.S. plans to withdraw from the treaty echoed the arguments Bromund had advanced for years.

Brexit was another welcome development that had been a long time coming. Lady Margaret Thatcher was the first British politician to call for the U.K. to extricate itself from the European Union. Fittingly, Heritage’s Thatcher Center has been the leading voice in the U.S. urging withdrawal.

Britain’s parliamentary elections in December finally sealed the deal. By year’s end, the U.K. was set to leave the European Union in early 2020 and become a truly free, sovereign nation once again.

So what’s next for Britain? Heritage has reason to hope it will be a large-scale free trade agreement between the world’s largest and fifth-largest economies.

The Thatcher Center was the first think tank on either side of the Atlantic to propose this free trade deal—broaching the idea in a 2014 report. Both countries are now working to get it done.

In August, we hosted Britain’s international trade secretary, Liz Truss, who gave a major speech on advancing a deal. The following month, we hosted former U.K. Trade Secretary Liam Fox for a roundtable discussion of next steps. A pact may well be signed in 2020.



Left: In September, U.S. Vice President Mike Pence gave an address at Heritage to kick off the administration’s final push to gain congressional approval of the landmark USMCA trade pact. Afterward (right), Heritage President Kay C. James welcomed the Mexican and Canadian ambassadors to a special reception. Four months later, she would participate in the bill-signing ceremony at the White House.

Throughout the year, the Thatcher Center kept a productive dialogue going with other allies and partners on a variety of topics. For example, senior officials from Denmark, Italy, and Sweden—as well as the U.K.—called on Margaret Thatcher Fellow Robin Simcox for advice on developing effective transatlantic counterterrorism initiatives.

Senior Research Fellow Brett Schaefer was chosen as one of 18 experts to represent the U.S. at the U.N. Committee on Contributions in New York. He later hosted the U.N. High Commissioner for Human Rights Michelle Bachelet. Back in D.C., Schaefer briefed the National Security Council on reforms needed in U.N. administration and in its peacekeeping operations.

## MAKING TRADE TREATIES BETTER

Trade with our North American neighbors accounts for a massive part of the U.S. economy. The North American Free Trade Agreement (NAFTA), which was passed in 1994, created one of the largest free-trade zones in the world, allowing America to export more products and services, create more jobs, and grow the economy.

As beneficial as NAFTA was, the modern economic landscape is far different from what it was 25 years ago. The digital trade of goods and services, and the need to protect intellectual property, has increased dramatically in recent years—issues NAFTA did not address. Renegotiating a trade deal with our neighbors that reflects the reality we live in was a common-sense decision.

Since the renegotiation process began in May 2017, trade experts in our Davis Institute and our Institute for Economic Freedom have provided nonstop guidance and recommendations to the administration on how to make the trade deal, dubbed the United States–Mexico–Canada Agreement (USMCA), the best it can be. We advocated tirelessly for a deal that protects free and open trade—and we weren’t afraid to disagree with the administration when it leaned toward protectionist policies.

Despite our occasional differences, our work has earned us respect and appreciation from the administration. In fact, Vice President Mike Pence chose to give a speech on the USMCA at Heritage headquarters in September.

In the end, the negotiations produced a USMCA that will strengthen protections for intellectual property rights and open up new markets, while continuing NAFTA's tariff-free treatment of many goods and services.

Then, when members of Congress delayed on adopting USMCA, Heritage President Kay C. James and other Heritage staff issued public reports and statements urging them to act. Finally, in December, the House voted overwhelmingly to approve the USMCA.

## HEDGING ON CHINA

Our *Index of U.S. Military Strength* rates China as the single greatest threat facing the United States. Beijing is pouring vast resources into the most modern forms of combat power and technology with the express aim of challenging U.S. military dominance in the Indo-Pacific.

Thanks to the work of our Asian Studies Center, four democratic nations in the region are standing up for peace and order in the Indo-Pacific. Since 2013, national security analysts from Heritage and leading think tanks in Australia, India, and Japan (as well as a fifth or "plus" country, chosen every year) have gathered annually to share their insights and strategies at the "Quad-Plus Dialogues."

In 2019, the ties between these countries grew even stronger. In September, secretaries of state from the Quad countries met for the first time—something Heritage has urged for years. Senior government officials met again in November to discuss joint efforts to promote stability, economic prosperity, and the rule of law in the Indo-Pacific. They will reconvene in the spring of 2020.

This is a key diplomatic initiative for Heritage. It has become such an important tool for countering Chinese aggression that Secretary of State Mike Pompeo publicly praised it as ensuring that China "retains only its proper place in the world."

In August, the State Department followed another Heritage recommendation, formally announcing that the U.S. had withdrawn from the 1987 Intermediate-Range Nuclear Forces Treaty. The pact limited U.S. missile deployments but not China's. This move puts us on a more even strategic footing with China. Addressing China's rise remains a top policy priority for 2020. 🇺🇸

ERIN GRGANZOW

## Two More Wins for the Allison Center

IN THE SPRING, JIM PHILLIPS AND the Hudson Institute's Nina Shea met with Brian Hook, the U.S. special representative for Iran and senior policy advisor to Secretary of State Mike Pompeo. They pled the case for providing direct aid for displaced Iraqi Christians and Yazidis still threatened by Islamist militias. Their research convinced Hook to press forward, and by year's end USAID began awarding grants to religious charities providing relief services to these persecuted groups.

In October, the State Department formally nominated Poland for entry into the Visa Waiver Program. The program allows citizens from security-compliant countries to travel to the U.S. without having to obtain a visa. Heritage views the program as a valuable tool supporting U.S. tourism, trade, public diplomacy, and national security. We have championed its expansion for the past decade.



Secretary of State Mike Pompeo lauds the diplomatic progress made by Heritage's "Quad-Plus Dialogues." in an Oct. 22 speech.





## **Jamie Hall**

RESEARCH FELLOW, QUANTITATIVE ANALYSIS,  
DOMESTIC POLICY STUDIES

# The Institute for Family, Community, and Opportunity

Jamie Bryan Hall was the first in his family to go to college, but he took to academia like a fish to water. At Harvard University, he earned not one but two degrees: one in applied mathematics, and the other in statistics.

Now seasoned by stints with the CIA, the Council of Economic Advisers, the National Security Council, and the for-profit sector, Hall today is recognized by his peers as a quantitative analyst *par excellence*. For the last four years, he's put those skills to work at Heritage, crunching numbers to expose the flaws in leftist policy.

Working in our Domestic Policy Studies department, Hall has written frequently on the importance of skills-based immigration and the need to optimize linkage between our immigration and welfare systems.

His research has also exposed exaggerations in the government's poverty statistics, taxpayer-subsidized waste in the higher education system, and misleading information from abortion providers.

In 2019, Hall trained his sights on the latest brainchild of the Left: Medicare for All.

Analyzing the proposal to replace all existing private health coverage with a government-run program, Hall determined that it would leave the vast majority of Americans worse off financially.

Federal payroll taxes would soar to 36.5% for most workers. The typical household would see its disposable income plunge more than \$5,600 per year. As for the promised "savings," Hall found that two of every three households would wind up paying more in taxes than what they currently pay in health premiums and out-of-pocket expenses.

The numbers were big—and so was the difference they made on Capitol Hill. When Hall's analysis circulated through House and Senate offices, enthusiasm for the proposal waned and advocates for free-market-oriented health care reform had

the ammunition needed to keep Medicare for All at bay.

## A BETTER APPROACH TO HEALTH REFORM

Meanwhile, Hall's colleagues concentrated on building support for our Health Care Choices plan. We developed this plan with the help of conservative allies in 2018, and the reform proposal now enjoys the support of more than 110 coalition cosigners.

In October, its status as the leading free-market alternative to Obamacare became evident when the Republican Study Committee released its health reform plan, at the Heritage Foundation's annual President Club event. The RSC plan tracks closely with Heritage recommendations.

The administration subsequently issued a regulation, consistent with our recommendations, allowing employers to shift from defined-benefit health plans to defined-contribution plans. Small wonder, then, that Business Insider named Domestic Policy Studies Director Marie Fishpaw one of its "top health care power players of 2019."

Heritage's influence was felt at the state level, as well. In seven states that adopted regulatory relief reforms, Obamacare premiums fell more than 7%, compared with a 3% median increase in other states. Once again, conservative policy has proved to be a solution.

## PROTECTING VULNERABLE LIVES AND TRADITIONAL VALUES

In February, the Department of Health and Human Services (HHS) issued the Protect Life Rule, which bars organizations receiving Title X



On campus at Brigham Young University, Dr. Ryan T. Anderson lectures on “The Importance of Marriage Today” at the Wheatley Institution, March 21, 2019.

## Quality Scholarship on Paper and in the Classroom

**OUR WILLIAM E. SIMON FELLOW,** Ryan T. Anderson, sparked a national debate in 2018 with the publication of *When Harry Became Sally: Responding to the Transgender Moment*. When released in paperback in August 2019, the book quickly soared to the top of bestseller lists, opening at No. 3 on The Washington Post’s D.C. nonfiction list, then reaching No. 1 in Amazon’s “New Releases in Natural Law” category.

It goes to show: Quality will win out. As Johns Hopkins University professor Paul McHugh put it: “*When Harry Became Sally* provides the empirical information needed to refute the transgender suppositions, and—in a most original way—makes historic sense of this social misdirection.”

Anderson proved to be a hit on campus as well as in bookstores. The University of Dallas named him its first-ever social thought teaching fellow. Anderson relishes his new collegiate duties. “While I continue to research and write about marriage, bioethics, religious liberty, and civil society for Heritage, now I can help the next generation think through many of these same issues, face-to-face.”

family planning funds from performing abortions. The revised regulation, long sought by Heritage’s DeVos Center for Religion and Civil Society, is expected to strip Planned Parenthood of some \$60 million in federal funds.

The abortion industry fought back in courts, winning state and local injunctions to block HHS from implementing the reform. Thankfully, the 9th Circuit U.S. Court of Appeals overturned those rulings in July, and HHS put most of the rule in effect immediately—a tremendous step toward getting taxpayers out of the abortion business.

DeVos Center scholars also played a critical role in encouraging HHS to revise Obamacare Regulation 1557, which redefined discrimination “on the basis of sex” to include gender identity. This forced doctors, hospitals, and insurers to provide and pay for sex-reassignment procedures. These are purely elective operations. In May, HHS proposed clarifying the regulation by noting that the legal meaning of the term “sex” remains biological sex. The clarification is estimated to save approximately \$3.6 billion in unnecessary regulatory costs over five years.

The DeVos Center also educated Congress and the public about the pitfalls of the so-called Equality Act. This bill, introduced in March, would make “sexual orientation” and “gender identity” protected classes under federal civil rights law.

Director Emilie Kao led a broad coalition against the proposal, arguing that the Equality Act would actually further inequality—by penalizing those who hold to traditional beliefs about marriage and biological sex. Unfortunately, she was able to point to a growing number of instances in which state and local variants of the Equality Act have been misused in this way.

Kao brought these concerns to the forefront in appearances on Fox News and C-SPAN and in numerous op-eds. Partly because of Heritage’s strong stance, the bill limped through the House with much weaker support than expected and never came up for a vote in the Senate.

Kao and two other members of the DeVos team, Dr. Ryan T. Anderson and Grace Melton, raised the alarm on the international stage, as well. In March, they traveled to New York to attend the United Nations’ 63rd Commission on the Status



On the 15th anniversary of the D.C. Opportunity Scholarship Program, a school voucher initiative in the nation's capital, Education Secretary Betsy DeVos (right) and Heritage President Kay C. James discussed the progress to date and the path forward.

of Women. Co-hosting a panel on “Gender Equality and Ideology,” Anderson and Kao shared their insights concerning the dangers of transgender ideology. Melton chaired a second panel, “Protecting the Rights of Women and Girls in the Age of Gender Identity.”

The DeVos Center’s influence was evidenced again on Nov. 1, when HHS announced its intent to end the Obama-era practice of withholding federal grants from faith-based foster care and adoption services agencies that refuse to act against their traditional views regarding same-sex marriage.

White House adviser Kellyanne Conway explained the rationale behind the reform this way: “I don’t want to discriminate against anyone; I want groups to be able to continue

their work without being discriminated against.” No longer will HHS grant-making infringe on religious freedom.

## EXPANDING EDUCATION OPPORTUNITIES FOR ALL

In June, Education Secretary Betsy DeVos rescinded the Obama administration’s “gainful employment” regulation. The rule had made it harder to get a federal student loan if you enrolled in a for-profit college or vocational training school rather than a public university.

Heritage had opposed the regulation from the start, even citing it as one of several education regulations deserving of repeal in our 2018 *Blueprint for Balance*.



## Virginia Walden Ford Goes Hollywood

### HERITAGE VISITING FELLOW VIRGINIA

Walden Ford has been a star of the school choice movement for almost two decades. This year, she became a celluloid hero as well.

In October, the Moving Picture Institute released “Miss Virginia,” a moving drama inspired by Walden Ford’s life story. The movie chronicles her unwavering fight to bring school choice to Washington, D.C.

Walden Ford’s successful crusade has benefited thousands of children who have been able to enroll in schools where they can be safe and get a real education. Heritage continues to be in the forefront of the school choice movement in states across the country.



Executive producer and film subject Virginia Walden Ford (center) with son Mike Walden and daughter-in-law Nikki Walden at the “Miss Virginia” New York premiere at SVA Theater on Oct. 4, 2019 in New York City.

Just a month before DeVos rolled back the regulation, Lindsey Burke, director of our Center for Education Policy, testified before the House Subcommittee on Economic and Consumer Policy about the need for it to be rescinded. “Many students seek out vocational training as a means of establishing a meaningful, long-term career in a critical field,” she noted. “The government should not penalize them for that choice.”

The education center remained active on the school choice front, as well. It was late 2017 when the then-new center came up with the idea of making Education Savings Accounts available to America’s military families. In the 116th Congress, bills to make that idea a reality were introduced in both chambers by Sen. Ben Sasse, R-Neb., and Rep. Jim Banks, R-Ind.

Senior Policy Analyst Jonathan Butcher testified on behalf of Education Savings Accounts before the South Carolina legislature, while Burke went national—and even international. She presented her research on how regulation affects school choice at the national conference of the Association of Education Finance and Policy. She also spoke at the International School Choice and Reform Conference in Portugal.

Toward year’s end, Burke and Butcher teamed to edit and publish *The Not-So-Great Society*, a scholarly indictment of former President Lyndon B. Johnson’s “Great Society” education programs.

With chapters contributed by Stanford’s Eric Hanushek, University of Arkansas’ Jay Greene, Harvard’s Paul Peterson, and more than a dozen other academics specializing in education reform, the book examines how federal intervention in education initiated in 1965 has affected the nation’s classrooms, from preschool through graduate school.

Its inevitable conclusion: the “Great Society” education programs have failed; it’s time to bring civil society back to the fore in education.

The book proceeds to map out a comprehensive agenda for education reform. Among other things, it stresses the importance of civics education and character development; the role of school choice, charter schools, and homeschooling; fixing student loans and college costs; and securing free speech on college campuses. 📖



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1. At the 2019 President’s Club Meeting Open House, Emilie Kao leads a policy chat about the Equality Act and the sexualization of children.
2. Mary Clare Amselem appeared on C-SPAN’s “Washington Journal” to discuss the college admissions scandal.
3. Lindsey Burke, editor of *The Not-So-Great Society*, at a book signing at the 2019 President’s Club Meeting.
4. Marie Fishpaw, Heritage’s domestic policy studies director, was named one of Business Insider’s “top health care power players of 2019.”



2



3



4

ERIN GRANZOW, C-SPAN, BAUMAN PHOTOGRAPHERS



**Angela Sailor**

VICE PRESIDENT, EDWIN J. FEULNER INSTITUTE

# The Edwin J. Feulner Institute

Some of America's greatest challenges now come from within. We the people are sharply—sometimes bitterly—divided over how to address our country's many problems.

Our nation's founding principles and philosophical roots are not widely taught and rightly understood. As a result, socialism has grown increasingly popular—especially among our young people.

To meet these challenges—some of them unimaginable a generation ago—Heritage in October launched the Edwin J. Feulner Institute. Named in honor of our founder, this new wing of Heritage is dedicated to preserving the American idea and demonstrating its validity and relevance to all American lives, regardless of race, creed, or class.

Heading up this enterprise is Angela Sailor, a seasoned leader with experience at all levels of government, as well as in the private sector. No stranger to launching startups, she built an entirely new department within the Republican National Committee, responsible for overseeing coalitions, strategic communications, and constituent services.

Under President George W. Bush, she served as associate director of the White House Office of Public Liaison. Her outreach efforts there led her to assemble numerous coalitions that brought together many diverse constituencies, including communities where conservative policy ideas had seldom made inroads.

More recently, she served as deputy to President Kay C. James at the Gloucester Institute, a Virginia-based nonprofit dedicated to training emerging leaders on how to bridge social divides, resolve differences and develop practical policy solutions.

Nor is she a stranger to managing educational outreach. As deputy chief of staff to U.S. Education Secretary Rod Paige, Sailor oversaw White House initiatives on educational excellence and higher education, as well as the Office for Faith-Based Initiatives.

Her bridge building has continued at Heritage, where she now co-hosts, with President James, a series of breakfast meetings bringing together center-left and center-right leaders. The featured guest at the first breakfast: U.S. Secretary of Housing and Urban Development Ben Carson.

Even before the official launch of the Feulner Institute, Sailor was already hitting some of its major themes in speeches around the country. For example, she spoke on American exceptionalism at the Georgia Young Republican Women's Leadership Conference, on Heritage's "True North" principles at a meeting of the Center for Urban Renewal and Education, and on "The Greatness of America" at the Virginia Tea Party's 10th anniversary celebration.

She also wrote several opinion pieces for media serving African American communities. One of these columns, "America Is My Home," was published by seven newspapers. "I love this positive article," said Ervin B. Clarke, publisher and CEO of Urban Views RVA. "It's good to have words and examples to highlight the many great opportunities that we have as Americans. We must not forget our past struggles, but our past and future accomplishments should be at the forefront of our thinking. Please send more encouraging articles."

He will get them in 2020.

## A NEW HOME FOR THE SIMON CENTER

Scholars in our B. Kenneth Simon Center for American Studies are now working within the new Feulner Institute. Their mission remains the same: to defend the institutions and civic virtues that sustain republican self-government; to advance the understanding of American exceptionalism; and to articulate how our nation's founding principles offer the best hope for bridging the divide that separates Americans today.





Associate Director and Research Fellow Arthur Milikh spoke at a panel on America's Cold Civil War in March. He has led the fight against the New York Times' effort to have its inaccurate and misleading 1619 Project taught in classrooms across America.

In the final months of 2019, Sailor recruited four top scholars to advance that mission: Dr. James Ceaser, Dr. Allen Guelzo, Dr. Melissa Moschella, and Dr. James Otteson.

These visiting fellows, as well as the Simon Center's full-time scholars, enter 2020 with a tremendous sense of excitement about meeting the challenges ahead.

## FIGHTING IDENTITY POLITICS AND FALSE HISTORY

The center will be building on the successes of 2019, a year in which it led the fight against the divisive ideology of identity politics. Simon Center Director David Azerrad kicked off the year with a First Principles essay on "The Promises and Perils of Identity Politics." The University of London's Eric Kaufmann called it "an incisive, deeply researched essay which skewers the dominant New Left ideology."

He followed up with "Smirking While White," a well-received analysis of the "Covington kids" debacle published in *The American Mind*. That essay led

to appearances on "Tucker Carlson Tonight" and "The Ingraham Angle."

In October, Arthur Milikh responded forcefully to the 1619 Project—the New York Times' attempt to canonize identity politics in America's classrooms. Based on the conceit that "anti-black racism runs in the very DNA of this country," the project attempts to rewrite history by claiming that "our true founding" dates back to 1619, the year that slavery was first introduced to Virginia—by the British.

In "1776, not 1619," an essay published in *City Journal*, Milikh explodes this false narrative, exposing its numerous omissions and distortions of the Founders' writings and thoughts.

The Simon Center will be even more engaged in battling back against the Times' insidious attempt to make America's Founding contemptible in the eyes of America's schoolchildren. Since its publication in August, the 1619 Project has delivered curriculum resources to more than 3,500 classrooms. Five school systems, including those in Chicago and Washington, D.C., have reportedly adopted it districtwide. This cannot—and will not—go ignored or uncontested. 🇺🇸

# Meet the Simon Center's Newest Visiting Fellows



**Dr. James W. Ceaser** is a professor of politics at the University of Virginia, where he has taught since 1976. He has written several books on American politics and political thought, including

*Presidential Selection, Liberal Democracy and Political Science, Reconstructing America, and Nature and History in American Political Development.* Ceaser has held visiting professorships abroad—at the University of Florence, the University of Basel, Oxford University, the University of Bordeaux, and the University of Rennes. He is also a frequent commentator in American media outlets. Ceaser holds a Ph.D. from Harvard University.



**Dr. Allen C. Guelzo** is the senior research scholar in Princeton University's Council of the Humanities and director of Princeton's James Madison Program Initiative in Politics and

Statesmanship. In 2018, he was awarded the Bradley Prize for "contributions [that] have shaped important debate, thought and research on one of the most critical periods of American history." He has won three Lincoln prizes for his books *Abraham Lincoln: Redeemer President* (2000), *Lincoln's Emancipation Proclamation: The End of Slavery in America Emancipation* (2005), and *Gettysburg: The Last Invasion* (2013). He is also a leading authority on colonial-era preacher and philosopher Jonathan Edwards and a leading critic of The New York Times' 1619 Project, which holds that America is defined not by her founding documents but by slavery. Guelzo earned his Ph.D. in history from the University of Pennsylvania.



**Dr. Melissa Moschella** is an assistant professor of philosophy at The Catholic University of America. She speaks and writes on a variety of contemporary moral issues, including brain

death, end-of-life ethics, parental rights, reproductive technologies, and conscience rights. She has been widely published in scholarly journals as well as popular media outlets such as The New York Times, USA Today, and The Washington Post. Her book, *To Whom Do Children Belong? Parental Rights, Civic Education, and Children's Autonomy*, was published in 2016 by Cambridge University Press. A magna cum laude graduate of Harvard University, she holds a licentiate in philosophy from the Pontifical University of the Holy Cross in Rome, and a Ph.D. in political philosophy from Princeton University.



**Dr. James R. Otteson** is the Thomas W. Smith presidential chair in business ethics, professor of economics, and executive director of Eudaimonia Institute at Wake Forest University.

The author of six books, Otteson serves as an associate editor for The Independent Review and as a senior editor of Political Economy of the Carolinas. He is also a senior fellow at the BB&T Center for the Study of Capitalism, a research professor at the University of Arizona, and a vice president and executive committee member of the Association of Private Enterprise Education. A magna cum laude graduate of the University of Notre Dame, Otteson received his Ph.D. in philosophy from the University of Chicago.



## The Project Our Nation Needs

**“TIMELY, NEEDED, AND EMPOWERING.”** That’s how one participant described the inaugural installment of the Feulner Institute’s Citizenship Project. The new initiative aims to bolster civil society’s positive influence on our nation.

The four-day policy and media training workshop was conducted Nov. 3-6 at Holly Knoll in Gloucester County, Virginia, home of civil rights leader Robert R. Moton. It drew more than 20 pastors, schoolteachers, and other local influencers from eight states.

The sessions prepared them to effectively counter the bombardment of negative messages about our nation’s founding principles. Unless addressed head-on, this negativity—often peppered with patently untrue “historic facts”—will have a debilitating effect on their communities, undermining faith in America and hope for the future.

The workshop received glowing reviews from participants. “Life changing,” raved one community leader. “Our nation needs this project,” said another.

### REACHING NEW AUDIENCES

Leaders from 13 states gathered Nov. 18-20 in Colorado Springs, Colo., for the Feulner



Top: The Innovation Strategy Meeting co-hosted by the El Pomar Foundation held in Colorado. Above: The Citizenship Project held in Virginia.

Institute’s Innovation Strategy Meeting. At the meeting, which was co-hosted by the El Pomar Foundation, participants shared research and experiences to gain fresh insights on how best to communicate conservative principles to communities where conservatism has never before taken root.

Attendees included executives from the Bill of Rights Institute, the Thurgood Marshall College Fund, Moms for America, the Hispanic Action Network, TeenPact, and the Douglass Leadership Institute. Also participating were Heritage Action Sentinels, grassroots activists fighting for free-market and conservative principles in their local communities.

The event was organized by Feulner Institute Vice President Angela Sailor, with support from Executive Vice President Kim Holmes and Vice President of Policy Promotion Bridgett Wagner.



The Heritage Action for America staff at its Southeast Sentinel Summit, held in Atlanta on Nov. 9.

## Growing the Conservative Movement Nationwide

Heritage Action takes the innovative policy solutions developed by The Heritage Foundation and works to translate those into legislative victories.

To be successful, we deploy both an inside- and outside-the-Beltway strategy, putting policy in front of members of Congress and the American people. Ten years in, Heritage Action is strengthening and growing the conservative movement every day.

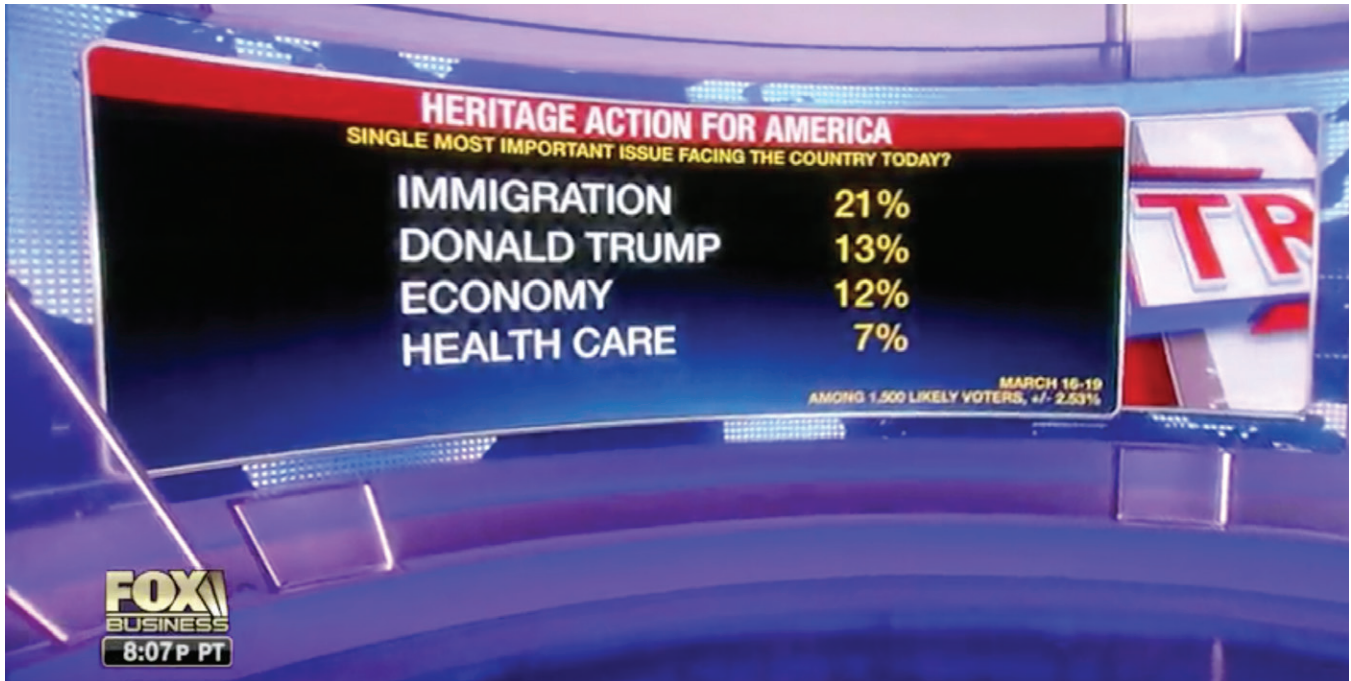
It's never easy to keep the "big tent" conservative coalition together. It was particularly challenging in 2019—a divisive, contentious year in Washington.

With a new Congress and fresh problems facing our nation, Heritage Action decided to think long-term. Our grassroots team energized and enlarged our base of supporters and volunteers around the country, conservative activists we call Sentinels.

This is a powerful group of over 20,000 committed grassroots activists who bring our policy recommendations back home to their communities and then engage directly with their representatives in Washington.

Meanwhile, our D.C.-based staff worked to advance our common-sense, conservative solutions among Capitol Hill staff as well as lawmakers. Finally, through our innovative polling project, we surveyed 4,500 Americans to match their policy interests with the work being done at The Heritage Foundation. Thanks to the hard work of all these individuals and initiatives, we found real success in 2019.

PHOTO COURTESY OF HERITAGE ACTION FOR AMERICA



Fox Business featured results from Heritage Action’s polling project on “The Evening Edit.”

## POLICY-BASED POLLING

Over a four-month period, Heritage Action conducted a series of detailed public opinion surveys with one simple goal: to find out what issues can most animate conservatives and “somewhat conservatives” to join forces and advance our policies.

From these surveys we gained numerous insights about Americans’ real concerns and views. For instance, we learned that what Americans found most concerning about illegal immigration wasn’t violence, job losses, or cultural change—it was the overuse of social services such as Medicaid and public housing. We also found that an overwhelming majority of Americans—including substantial numbers in every party, region, and age group—reject extreme policies such as socialism, government-run health care, the radical pro-choice agenda, and many more. It was good news across the board: America is hungry for conservative solutions.

This polling led us to focus on four issue areas—immigration, culture, the workforce, and the economy. In each area, we have numerous policy recommendations that appeal to many individuals who don’t yet identify as conservative, but who should.

We shared all this information with stakeholders in Washington and with the American public. The media found our insights fascinating,

and write-ups appeared on Fox News, USA Today, Politico, and more than 25 other influential media outlets. In addition, we briefed top staff from the White House policy and political team, the Office of Management and Budget, the Republican Study Committee, Senate GOP leadership, the National Republican Congressional Committee, and anyone else who would listen.

What we learned through our polling continues to shape policy and messaging throughout the conservative movement, from the White House to our grassroots activists around the country. By putting our finger on the pulse of the American voter, we are better able to push for conservative policies that meet the needs of Americans everywhere.

## HERITAGE ACTION IMPACT: PRESIDENT TRUMP’S PUBLIC CHARGE RULE

The immigration debate offers a great example of how our polling project put us on the road to policy victory. One key finding was that voters’ greatest concern with illegal immigration was the overuse of social services.

That was something we stressed over the course of several briefings at the White House. We recognized that, not only had this point been



Heritage Action Vice President Jessica Anderson introduced Rep. Steve Scalise, R-La., to a group of Heritage Action Sentinels in D.C. for the Born-Alive Abortion Survivors Protection Act fly-in.

given too little attention in the public discussion of immigration, but there were practical actions the administration could take to address the issue—without having to get congressional approval.

Two months after our briefings, the administration took one such action: the White House updated the “public charge” rule. The rule provides that people seeking entry into the country may be denied admission if they will have to rely on government assistance. Enacted in the 19th century, the rule had been updated once—in 1999, when the Clinton administration ruled that potential immigrants could accept an unlimited amount of noncash welfare benefits. That update has since cost the U.S. untold billions of dollars. But thanks to the new public charge rule, those who receive a certain level of government welfare, or are determined likely to do so, are ineligible for permanent residency.

Heritage Action Executive Director Tim Chapman celebrated the victory with an op-ed in *The Hill*: “The administration’s rules will limit those who abuse our systems of welfare, amnesty, and law enforcement while encouraging those who want to come to this country and contribute to society—no-brainer policies to anyone who lives outside the D.C. bubble.”

Predictably, an activist judge issued a nationwide injunction to stop its enforcement. But in January 2020, the Supreme Court upheld the rule as constitutional. Heritage Action celebrated again: the deciding vote cast in the court’s 5-4 decision came from Heritage Action-backed Justice Brett Kavanaugh.

Heritage Action’s role in this victory was crucial. Our polling showed Americans’ real concerns with immigration, and we showed those concerns to key policymakers. Those policymakers created an effective rule—now affirmed as being constitutional—that will protect our nation’s social services and ensure new citizens are able to work and support themselves in America.

#### HERITAGE ACTION IMPACT: THE BORN-ALIVE ABORTION SURVIVORS PROTECTION ACT

In February, Sen. Ben Sasse, R-Neb., reintroduced the Born-Alive Abortion Survivors Protection Act. It was in response to unsettling developments in Virginia, where lawmakers debated a bill permitting abortion until the moment of birth and Gov. Ralph Northam had seemingly endorsed infanticide in a radio interview.



More than 100 Heritage Action Sentinels and staff attended the Ohio Sentinel Summit in Cincinnati, one of four regional Sentinel Summits convened in 2019.

Currently, federal law does not provide adequate protections for babies born alive after a botched abortion procedure, nor does it establish specific requirements of care on the part of practitioners. The Born-Alive Act would fix that and protect the rights of infants.

Heritage Action immediately got to work on this pro-life policy. On Feb. 18, we launched a campaign to build a bipartisan coalition of 218 lawmakers to sign a discharge petition, which would force a vote on the House floor. Representatives would then have to go on the record as supporting or opposing a child's right to life (supporting or opposing infanticide). To get sufficient signatures on the petition, Heritage Action targeted 28 House districts with vulnerable Democratic lawmakers.

The ongoing campaign includes grassroots activism, informational meetings on the Hill, advertising, and a media push. Thus far, nearly half a million activists have worked on the issue and participated in rallies across the nation. In April, more than 60 Heritage Action Sentinels flew in to Washington, D.C., to personally lobby their members of Congress. By year's end, we had amassed 204 signatures from both parties, just 14 short of the number needed to force a vote. This work, though not yet completed, will continue, as the discharge petition carries over to 2020.

Heritage Action's leadership on this urgent issue has been recognized by U.S. News & World Report, Politico, Breitbart, Washington Examiner,

and numerous radio stations. Thanks to the work of our team and supporters across the nation, along with other pro-life groups, the bill has become a top national issue, receiving numerous hearings in Congress and even the attention of President Trump, who spoke directly about the bill. Protecting life is one of the highest callings in politics, and Heritage Action is proud to be a part of it.

#### HERITAGE ACTION IMPACT: IMPEACHMENT AND ACQUITTAL

In September, after three years of threats and investigations against President Trump the Left finally began an impeachment effort. Early on, Heritage Action realized how partisan and unfounded this effort was, and we used every tool at our disposal to oppose the unfair process.

Chapman and Vice President Jessica Anderson spearheaded our drive to expose the process and get Congress back to work. They wrote articles for USA Today and The Hill, documenting the distraction and misdirection at the heart of the impeachment effort. Chapman made numerous appearances on Fox News to oppose the shameful motives behind the Left's investigation.

When the partisans controlling the House pushed the process to impeachment and on to a Senate trial, Heritage Action key-voted against it—in both chambers. And as soon as the Senate votes were cast and the president was acquitted, Chapman issued a statement advising lawmakers on what to



Sentinels Jimmie Lee Tillman II (left) and Ebony Tillman meet former congressman Darrell Issa at the Ohio Sentinel Summit.

do next: “A dark chapter in our nation’s history is over. It’s time to turn the page. Now Congress can do what they were elected to do: get back to work.”

### HERITAGE ACTION IMPACT: JOBS FOR SUCCESS ACT

Heritage Action also worked to improve the lives of the poor in America. We know that work and healthy families are essential ingredients in lifting Americans out of poverty, so we pushed for the Jobs and Opportunity with Benefits and Services (JOBS) for Success Act. This common-sense bill would help people end their dependence on government and find meaningful employment by strengthening work requirements for the Temporary Assistance for Needy Families program.

Riven by bitter partisanship, this Congress has been extraordinarily divided, making it extremely difficult to build bipartisan consensus around any piece of legislation. This bill was no exception; it never made it out of the liberal-controlled House.

It did, however, accomplish something quite meaningful. After Heritage Action key-voted for co-sponsorship, 90 representatives and 3 senators signed on to the bill. That’s the largest showing of support for welfare reform in the 21st century.

It is yet another solid plank in a comprehensive policy platform that is unifying conservatives now and setting us up for real policy success in coming years. 🇺🇸

PHOTO COURTESY OF HERITAGE ACTION FOR AMERICA

## Grassroots and Sentinel Fly-Ins



### HERITAGE ACTION’S

greatest assets are our grass roots, and we draw on those assets throughout the year. Three times in 2019, a large contingent of our activists flew in to D.C. to lobby their representatives. And when constituents care enough about an issue to fly in from “back home,” Capitol Hill pays attention.

The first fly-in focused exclusively on supporting the Born-Alive Abortion Survivors Protection Act. We flew in 65 Sentinels to visit 34 offices and let legislators know how firmly they support the bill. Their message was clear: The lives of infants are at stake, and it’s up to us to protect them.

During the fly-in, Sentinel Carol Polzin met with Rep. Collin Peterson, D-Minn., who represents the district next to hers. She urged him to stand up for the sanctity and dignity of human life and sign the discharge petition to bring the act to the House floor. That same afternoon, he signed it.

Our next two fly-ins brought together nearly 100 grassroots activists to lobby Congress on three specific issues: the JOBS for Success Act, the U.S.-Mexico-Canada trade pact, and the impeachment proceedings. Twenty-two representatives and senators heard from their own constituents about the importance of work and free markets and the need to stand firm against the partisan impeachment process. Our Sentinels also left the meetings feeling empowered—and knowing that they had gone the extra mile to promote principled, conservative action on Capitol Hill.





## Charles Mitchell

COMMONWEALTH FOUNDATION CEO  
*Accepting the Robin and Jocelyn Martin Young Leaders Program  
Distinguished Intern Alumni Award from Vice President Bridgett Wagner*

# Policy Promotion

It's almost a given that Heritage interns will go on to successful careers in government, academia, public policy, and the private sector.

Some, such as Sen. Tom Cotton, R-Ark., Susan B. Anthony List CEO Marjorie Dannenfelser, and D.C. Circuit Court of Appeals Judge Neomi Rao, become conservative icons, due in no small measure to the grounding they received in our Young Leaders Program.

In 2019, we honored another conservative leader, Charles Mitchell, with our Robin and Jocelyn Martin Young Leaders Program Distinguished Intern Alumni Award.

Mitchell interned at Heritage 15 years ago. Today, he serves as president and CEO of the Commonwealth Foundation for Public Policy Alternatives, an increasingly influential free-market think tank in Pennsylvania. In 2019, the organization's research and advocacy efforts helped convince state lawmakers to pass criminal justice reforms, boost school choice, and reject all proposed tax hikes.

In accepting the award, Mitchell traced much of his success back to our Young Leaders Program. "At a very young age, Heritage gave me an amazing environment in which to begin that transition from being an activist and writer, to being a leader ... and I am only one of thousands of people for whom you have done that," he said.

## YOUNG LEADERS PROGRAM TURNS 40

Mentorship, hands-on experience, intellectual rigor—these are the key elements of the intern experience at Heritage. Launched in 1979, our Young Leaders Program gives young people a firm grounding in our nation's founding principles and equips them to identify "True North" on policy questions and stand up for what is right. Over the last four decades, we've sent more than 4,500 nascent conservative leaders out into the world.

In 2019, we welcomed 188 interns from 118 colleges and universities in 31 different states. Each

of our three intern classes participated in our First Principles lecture series, attended weekly policy briefings by Heritage experts, and worked shoulder to shoulder with our staff. Every group enjoyed unique experiences, as well.

For example, our spring interns participated in the March for Life and helped represent Heritage at the 2019 Conservative Political Action Conference. Following a tour of the Supreme Court, they had a private meeting with Justice Brett Kavanaugh, who fielded their questions for nearly an hour.

Our fall interns met with another "Supreme," Justice Clarence Thomas. The summer interns visited the National Archives and enjoyed an inspiring tour of Mount Vernon.

Twelve interns also participated in a pilot program co-sponsored by the Gloucester Institute. They travelled to historic Holly Knoll in Gloucester County, Virginia, for two daylong sessions with members of Gloucester's Emerging Leaders Program. Their frank talks and probing discussions addressed four issues critical to the future of civil society: race, criminal justice reform, school choice, and health care. Feedback was overwhelmingly positive, and we are planning for more collaborations with the Gloucester Institute in 2020.

Gloucester wasn't the only new partnership established this year. Always looking to reach new audiences that seldom hear the conservative side of debates, the Young Leaders Program also conducted joint events with the Congressional Hispanic Leadership Institute, the Congressional Hispanic Caucus Institute, Turning Point USA's Young Jewish Leadership Summit, and Christians United for Israel.

Additionally, we hosted briefings for over 65 student groups and spoke at 19 outside youth conferences. In all, the Young Leaders Program carried the conservative message to more than 3,000 students and young professionals in 2019.



Our Job Bank hosts its Conservative Career Fair in October.

Our Phillip N. Truluck Center for Leadership Development also was active in developing young talent. Center staff trained college students at meetings of the Forge Leadership Network and the Hispanic Action Network and conducted two multisession programs of their own.

Through its Local University Conservatives Program and its Conservative Hill Intern Program, the center introduced more than 160 Gen Z and millennials to our country’s First Principles and to Heritage policy solutions. These sessions help us to identify strong candidates for our intern program and to develop young talent for future placement across the conservative movement.

## BEYOND THE INTERNSHIPS

Heritage doesn’t just develop strong conservatives and prepare them for leadership roles—we help them find work where they can lead the nation forward. In 2019, our Job Bank helped 30 former interns land their first public policy jobs.

Over the course of the year, the Job Bank placed 120 conservatives in excellent positions—

42 of them in slots on Capitol Hill or in the Trump administration.

Having the right people in the right places is often pivotal to achieving policy success. Dr. Brian Blase is a prime example.

Blase first came to Heritage as a graduate fellow in health policy. He was later promoted to policy analyst. In 2017, he joined the Trump administration as special assistant to the president for health care policy.

Serving on the White House’s National Economic Council, he helped draft and advance regulatory changes to lower health care costs and expand insurance choices. He also coordinated development of the administration’s groundbreaking report, “Reforming America’s Health Care System Through Choice and Competition,” which pairs nicely with our Health Care Choices reform plan.

In September 2019, Blase returned to Heritage as a visiting fellow, where he will continue working to advance conservative policy on health care and entitlement reform.

# Some Interns Find Their Dream Job at Heritage

Not all of our interns go on to do great things outside of Heritage. A lot of them come back to Heritage and do great things for us. Meet two such “keepers”: Anthony Kim and Gloria Taylor.



South Korean-born **Anthony Kim** came to the U.S. in 1995 as a college student. Even then, he knew about The Heritage Foundation. “The Heritage Foundation was already a

big power player in Asia,” he recalls.

After graduating from Rutgers University, he began graduate studies at George Washington University. “After one semester, I decided I wanted to spend my time and energy in a more practical way,” he says.

In the summer of 2000, Kim was accepted as an intern in our Center for Data Analysis. There he found the hands-on, real-life experience he was looking for: “The internship program is like a practical MBA—without the formal requirements,” he says.

In 2001, he became a full-time Heritage staff member, eventually joining our Center for International Trade and Economics. There, he started working on our annual *Index of Economic Freedom*.

Over the years, Kim helped make the *Index* more detailed, more dynamic, and more widely disseminated (via an interactive website, [heritage.org/index](http://heritage.org/index)). In 2007, he received our Drs. W. Glenn and Rita Ricardo Campbell Award in recognition of his outstanding contribution to the analysis and promotion of a free society. In 2013, he was named editor of the *Index*.



Like Anthony Kim, **Gloria Taylor** was well aware of Heritage long before setting foot in D.C. “I was raised in the conservative movement,” she says. “I grew up listening to Rush Limbaugh and reading

National Review. In high school, ‘intern at Heritage’ was on my five-year plan.”

Taylor attended Furman University, majoring in economics and political science. Following her sophomore year, she got a call from intern recruiter Kyle Bonnell. “It was like a dream come true,” Taylor says. “I couldn’t wait to apply.”

In 2015, Taylor interned for Dr. Norbert Michel, analyzing banking data as part of his research on Dodd-Frank legislation. “I was able to put my theoretical knowledge of econometrics to practical use. But by summer’s end, I realized that I didn’t want a career crunching numbers; I wanted one where I could amplify the conservative economic message,” she says.

While finishing her senior year, Taylor learned that Heritage Action was hiring. Within weeks, she was Heritage Action’s newest grassroots associate. She later went to work in the communications shop of Rep. Rob Wittman, R-Va.

In May 2019, she returned to Heritage. Today, as communications manager for our Institute for Economic Freedom, she books interviews and arranges press briefings for our economics team. And she doesn’t have to crunch a single number.



## Resource Bank 2019

1. Bridgett Wagner with Arizona Gov. Doug Ducey at Resource Bank's opening luncheon.
2. Former CKE Restaurants CEO Andy Puzder speaks on socialism and capitalism in a plenary session at Resource Bank.
3. Heritage President Kay C. James speaks at Resource Bank.
4. Heritage Social Media Manager Lyndsey Fifield speaks in a breakout session about social media.



## RIISING TO THE CHALLENGE

Vice President Bridgett Wagner organized another outstanding Resource Bank Meeting, held May 28-30 in Scottsdale, Arizona. With a theme of “Rise and Renew,” it was a clarion call for all elements of the conservative movement to rise to meet the challenges of the Left and renew our commitment to conservative principles.

The 547 attendees—including local, state, and national leaders, as well as four foreign

ambassadors to the U.S.—represented the full range of modern conservatism. They heard from Arizona Gov. Doug Ducey, members of Congress, pollsters, fundraising and communications experts, journalists, and businesspeople, as well as leading national policy experts.

Among the panel discussions, the session on immigration reform generated the greatest interest. It drew a crowd that went beyond standing-room-only to full-fledged overflow.

Two other highlights of the meeting: the presentation of our Salvatori Prize for American Citizenship to journalist and Fox News contributor Mollie Hemingway, and the annual Robert H. Kriebel Lecture, in which former U.S. Circuit Court of Appeals Judge Janice Rogers Brown spoke on “Constitutional Law and Judicial Restraint.”

Wagner’s team also added a new element to the meeting: the Rising Leaders Fellowship. After soliciting movement allies for recommendations of outstanding conservative students and young professionals, we selected 35 of these “Rising Leaders” to join us for the conference. In addition to having access to all general sessions, they attended special networking and communications-training sessions designed just for them. On the strength of participants’ reviews, we have decided to expand the program in 2020.

## BARNSTORMING FOR HEALTH CARE REFORM

Coalition Relations teamed with our domestic policy experts to conduct a nationwide tour to educate state leaders, lawmakers, activists, and students on the Health Care Choices reform proposal.

The first stop, Kentucky, included briefings with Gov. Matt Bevin, Health Secretary Adam Meier, state lawmakers, and local activists, as well as local staff from the offices of Senate Majority Leader Mitch McConnell and U.S. Rep. Andy Barr.

Following the briefings, our health experts participated in a well-attended press conference, then met with the editorial board of the Louisville Courier-Journal before topping off the evening with a roundtable discussion of single-payer health care with student leaders of the University of Louisville. By the time they moved on to the next stop, they had generated more than a dozen news stories.

Coalition Relations Director Jordan Hess followed this model on similar stops in Arizona, Florida, and Georgia, always partnering with local think tanks. In each instance, the program generated new support for our health care plan—from state think tank leaders, taxpayer advocates, and faith-based organizations, as well as state legislators. 🏠



President-elect Nayib Bukele of El Salvador spoke at Heritage in March.

## Public Programs 2019

**OUR PUBLIC PROGRAMS TEAM RAN** full tilt throughout the year, presenting 159 public events. Among those welcomed to our lecture halls were Education Secretary Betsy DeVos, then-Acting Attorney General Matthew Whitaker, 14 U.S. senators, 10 U.S. representatives, and one governor.

We also made the Heritage podium available to 13 foreign dignitaries, including the president-elect of El Salvador (above), the president of Taiwan, and the president of the Central Tibetan Administration—more evidence that Heritage’s influence extends not just to Capitol Hill but around the world.



Sen. Marco Rubio, R-Fla., spoke at Heritage in February about Venezuela.



Interns at the inaugural Heritage Honors Gala in October.

## NAMED INTERNS 2019

### CAESAR ARREDONDO INTERNS

Annelise Butler, *Providence College*  
 Joseph Carl, *Liberty University*  
 Antonia Passalacqua, *Florida International University*  
 Miguel Pontifis, *Liberty University*  
 Matthew Prillman, *Virginia Tech*  
 Joseph Rodriguez, *University of California, Berkeley*

### RICK AND PATTIE BARRETT INTERN

Kavya Ramagiri, *Baylor University*

### H.N. AND FRANCES C. BERGER FOUNDATION INTERNS

Isaac Ahn, *College of William and Mary*  
 Bryn Allen, *University of Notre Dame*  
 Alexandria Halton, *Grove City College*  
 Michael May, *Seton Hall University*  
 Patricia Patnode, *Loras College*  
 Andrew Smith, *George Washington University*

### JOHN AND BARBARA BRUNING INTERN

Courtney Joyner, *University of Texas at Austin*

### ELIZABETH MALLINCKRODT

**BRYDEN INTERN**  
 Joshua Nelson, *Syracuse University*

### DAVID V. BURGETT INTERNS

Jonathan Marcus, *University of Michigan*  
 Zachary Mettler, *William Jessup University*  
 Terra Schroder, *University of Michigan*

### DAVID JOSEPH BURKE INTERN

Nicholas Marr, *Notre Dame*

### MARY H. CAMPBELL FOUNDATION INTERN

Delayne Smith, *Texas A&M University*

### CARTER AND MOYERS INTERNS

Seamus Brennan, *College of the Holy Cross*  
 Ben Sachrison, *University of California, Los Angeles*  
 James Selvey, *Olivet Nazarene University*

### RICHARD EARL CARTER MEESE CENTER INTERN

Abby Klose, *Liberty University*

### CLOUGH FAMILY INTERN

Nicole Staley, *Pensacola Christian College*

### GENE D'AGOSTINO MEESE CENTER INTERN

Sarah Erickson, *Catholic University*

### JOHN R. AND MARGRITE DAVIS FOUNDATION INTERN

Sarah Ford, *University of North Carolina at Chapel Hill*

### GARY L. DAWSON INTERNS

Benjamin Burke, *University of Virginia*  
 Lianna Farnesi, *Florida International University*

### REBECCA EDDY

**DE BROEKERT INTERN**  
 Clara Hathorne, *Williams College*

### RAYMOND ALBERT FERRELL INTERN

Graham Filby, *Grove City College*

### FRANKLET INTERN

Timothy Kennedy, *George Washington University*

**RICHARD AND BARBARA  
GABY INTERNS**

Caleb Hempstead, *Liberty University*  
Anthony Jones, *Wyoming Catholic College*

**BERNIECE AND WILLIAM  
GREWCOCK INTERNS**

Riley Arlinghaus, *Hillsdale College*  
Carmel Kookogey, *Hillsdale College*  
Michael Maher, *Brigham Young University*

**JAN HAIR INTERNS**

Samuel Lucas, *University of Notre Dame*  
Alexandra Nieuwsma, *Westmont College*

**LINDA BOYCE HALLER INTERN**

Elias Gavilian, *Patrick Henry College*

**HASKELL ROBINSON INTERNS**

Joseph Casais, *Columbia University*  
Kelly Craig, *Massachusetts Institute of Technology*  
Sean-Michael Pigeon, *Yale University*

**MARJORIE W. HERRICK INTERN**

Alex Roegge, *Wake Forest University*

**CHET AND PATRICIA**

**HOUSTON INTERN**

Thea Dunlevie, *University of North Carolina*

**HUSTON FOUNDATION INTERN**

Paige Pristas, *Pennsylvania State University*

**DAVID A. KING INTERNS**

Bradley Devlin, *University of California, Berkeley*  
Grant Steele, *Wittenberg University*

**KEVIN KLINE INTERN**

Abigail Vendt, *University of Virginia*

**KEVIN KOOKOGEY  
MEESE CENTER INTERN**

Patrick Henry Featherston, *Texas A&M University*

**KUCHTA FAMILY INTERN**

Samantha Michon, *Brigham Young University*

**ROBERT E. LAMB II INTERNS**

William Coudret, *Miami University*  
Andrea Hitt, *University of Virginia*  
Julia Mroz, *Wake Forest University*  
Spencer Peck, *American University*  
Sam Wolf, *Cornell University*

**SANDY AND BRUCE LANG INTERNS**

Elena Ehrlin, *University of Northern Colorado*  
Megan Snitchler, *Grove City College*

**DAVID AND REBECCA  
LASCHINGER INTERN**

Madison Ferguson, *Wichita State University*

**ROBERT MAIR MEESE  
CENTER INTERNS**

Lucas Drill, *Columbia University*  
Christina Eastman, *University of Rochester*

**MAYER INTERN**

Ellen Wittman, *Miami University*

**ROBERT S. AND JANET L. MILLER  
FOUNDATION INTERNS**

Sophia Bagley, *University of Utah*  
Jonathan Biagini, *University of Notre Dame*  
Johanna Burke, *Christendom College*  
Josh Cosby, *Southern Utah University*  
Aaron Credeur, *University of Dallas/Georgetown*  
Rachel Gill, *Texas A&M University*  
Clare Hepler, *Christendom College*  
Emma O'Connor, *George Washington University*  
Coleman Rausch, *Patrick Henry College*  
Emma Watkins, *George Washington University*

**GUIDO AND SUE PICHINI INTERN**

Alexander Hyatt, *Bryn Athyn College*

**PILGRIM FOUNDATION INTERNS**

Michael Bugay, *Florida International University*  
Heidi Thom, *Whitworth College*

**DORIS AND RICHARD  
PISTOLE INTERN**

Jacob Flood, *Washington and Lee University*

**RAY FOUNDATION INTERNS**

Caroline Downey, *Boston College*  
Alexander Morales, *Florida International University*  
Jacob Paolillo, *Florida State University*

**HOWARD AND JILL SADKIN INTERN**

Benjamin Paris, *Harvard University*

**JORDAN SAUNDERS INTERN**

Kaylee Greenlee, *Baylor University*

**JOE H. SCALES INTERN**

Caleb Kostreva, *Carnegie Mellon University*

**GREG SHEEHAN**

**MEESE CENTER INTERNS**

Cooper Conway, *Boise State University*  
Elisabeth Daigle, *Spring Hill College*

**SHINING CITY ON A HILL INTERNS**

Morgan Bevin, *Grove City College*  
Kelsey Gaudette, *George Mason University*  
Derek Hosford, *Michigan State University*  
Danielle Merwin, *Hope College*  
Alexander Rigsby, *University of Richmond*  
Brandon Weber, *University of Michigan*

**HARRY E. SIMS INTERN**

Elise Stebick, *American University*

**SONTHEIMER INTERN**

Roe Willcox, *Clemson University*

**CORINNE SPENCE INTERNS**

Kiran Menon, *University of Virginia*  
Greg Walsh, *University of California, Los Angeles*

**COL. CHARLES B. AND SALLY G.  
STEVENSON INTERN**

Victor Xiao, *Duke University*

**SYDNEY A. SWENSRUD  
FOUNDATION INTERNS**

Dwayne Clark, *Embry-Riddle Aeronautical University*  
Fabio van Loon, *Luiss Guido Carli University*

**GEORGE W. TIPPINS INTERN**

Justin Corbin, *Grove City College*

**TOM TRACY INTERN**

Caroline Lindey, *Grove City College*

**TRIAD FOUNDATION INTERNS**

Michael Johns, *Cornell University*  
Paul Zepeda, *University of Dallas*

**JAMES A. WEST INTERN FOR  
DEFENSE IN THE DAVIS INSTITUTE**

Danielle Ford, *Patrick Henry College*

**SAMUEL L. WESTERMAN  
FOUNDATION INTERNS**

Chase Floyd, *University of South Carolina*  
Emily Turek, *Drake University*

**WILLIAM M. YOUNG  
MEESE CENTER INTERN**

Alexis Huggins, *Wheaton College*

**ROBERT AND AUDREY ZINSER  
MEESE CENTER INTERN**

Peyton Smith, *Taylor University*





**Mike Howell**

SENIOR ADVISOR, EXECUTIVE BRANCH RELATIONS

# Government Relations

It was clear from the start that immigration would be a dominant issue in 2019. After all, Washington began the year in a partial government shutdown largely because of congressional disagreement over funding for the border wall.

To break the impasse, lawmakers floated a tradeoff: amnesty for recipients of Deferred Action for Childhood Arrival benefits in return for the wall. When word of the proposal leaked, Heritage's government relations staff responded immediately, informing every congressional office and numerous officials within the administration that any such deal would be unacceptable. With conservative support taken off the table, amnesty was dropped from the final deal.

It was but the first of many immigration reform victories for Heritage. A major reason for our success can be summed up in two words: Mike Howell.

A senior advisor in our government relations department, Howell came to Heritage in October 2018 from the Department of Homeland Security. Prior to working at DHS, he served as an attorney for both the Senate Homeland Security and Governmental Affairs Committee and the House Oversight Committee. In each of these positions, Howell built strong professional relationships, as well as expertise.

"Mike is well-connected and well-liked within the administration and in both chambers," Vice President Tommy Binion says. "He's also everything you want in an advocate: smart, compassionate, and always—always—prepared. And when you've got the desire to get things done and the network needed to push it along, policy magic happens."

Howell brought some magic to the national media, as well. He took on Sen. Ron Wyden, D-Ore., in an immigration debate aired on PBS. And he became a frequent presence on Fox News, where one of its bookers told us Howell was regarded as a top "get" for immigration coverage.

## KEEPING IMMIGRATION REFORM ON TRACK

When Heritage released its "Agenda for American Immigration Reform," our government relations team made sure it got into the hands of—and was

explained to—all of the key staff handling immigration policy on the Hill and in the administration. Howell personally met with top DHS officials to "read them into" the comprehensive report.

In the briefings for administration officials, Heritage emphasized reforms that could be implemented via executive action. By year's end, several of these actions—such as enforcing the public charge rule—had been taken.

The government relations team also helped lawmakers navigate the landmine-laden seas of immigration policy, steering them away from bad ideas and back to True North principles as outlined in Heritage's report. To help lawmakers respond to constituent concerns, the team conducted an "Immigration Communications Clinic" for legislative correspondents from 31 Hill offices.

Looking to the future, they helped bring Heritage expertise to both White House and Republican Study Committee (RSC) staffers charged with developing 2020 immigration reform plans and briefed 13 congressional candidates on immigration issues.

## MOVING "HEALTH CARE CHOICES" INTO POSITION

Even as they fought against Medicare for All, our government relations team pressed to advance our own comprehensive health reform proposal: the Health Care Choices plan. Working with our domestic policy experts, they developed all the supporting documents a congressional office could ask for: polling information, messaging research, policy backgrounders, model legislative text, and a professional "score" (cost analysis).

"We call it 'the total package,'" Binion says, "and it's been extremely well-received on the Hill." The RSC found it tremendously helpful in writing its own health care proposal. It was no coincidence



Senior Research Fellow Brett Schaefer testifies before the Senate Foreign Relations Committee about needed U.N. reforms.

that RSC Chairman Mike Johnson, R-La., chose to launch its plan at our President’s Club Meeting.

The White House, too, has indicated that the plan it was preparing at year’s end will dovetail nicely with both the RSC plan and ours.

Of course, the administration had already shown itself to be receptive to our ideas for improving the nation’s health care system. Two new rules implemented in 2019—one requiring transparent drug pricing for Medicare and Medicare programs, the other modernizing Part D and Medicare Advantage to lower drug prices and out-of-pocket expenses—reflect our recommendations.

## SHARING IDEAS, DEVELOPING TALENT

Throughout the year, our government relations team hosts regular meetings of various working groups they’ve formed for congressional staffers. There are working groups for House legislative directors and Senate legislative directors, as well as bicameral meetings such as those for military legislative assistants and the Fiscal Sanity Working

Group, which government relations co-hosts with the Hermann Center for the Federal Budget.

Though the areas of interest differ, all of these meetings serve the same purposes: to bring everyone up to speed on what’s happening, to share new information and ideas, to develop strategies for moving conservative policies forward, and to build relationships that will hold the conservative movement in good stead for years to come.

Those same goals apply to the four formal training programs coordinated by our government relations department.

The Heritage Congressional Fellows Program, now in its 18th year, offers a series of 24 lecture and discussion programs for junior congressional staffers. Co-sponsored by our Simon Center for American Studies, the program gives participants a firm grounding in First Principles. In 2019, we graduated 72 fellows from 52 offices.

Graduates of the Congressional Fellows Program are eligible to enroll in “Take That Hill: Leadership Skills for Congressional Staff.” A six-part leadership development program, Take That



Heritage Congressional Fellows Program graduates on the steps of the Library of Congress.

Hill graduated 23 young leaders from 20 different members’ offices.

Our Civil Society Fellowship is designed for mid-level Hill staffers. It addresses public policy issues pertaining to life, marriage, and religious freedom. After participating in six policy discussions, the 2019 class of 10 fellows concluded the program with a spirited debate on gender identity and federal law.

Heritage’s Davis Institute for National Security and Foreign Policy co-sponsors our George C. Marshall Fellowship. This six-month program prepares young professionals—both on the Hill and off—to fill future leadership roles in national security and foreign policy. Davis Institute scholars with decades of military leadership experience lead the sessions.

In 2019, the Marshall Fellowship enrolled 25 participants for a deep dive into national security policy and the art of developing a grand strategy. They are now prepared to follow in the footsteps of earlier Marshall Program graduates who have gone on to serve in senior positions in Congress, the Trump administration, and the private sector. 📌

ERIN GRANZOW

## Heritage on the Hill: By the Numbers

**129**

congressional policy briefings hosted

**600**

meetings arranged for Heritage experts, including:

**MORE THAN**

**100**

with members of Congress

**300**

with congressional staff

**250**

with executive branch officials



**Jarrett Stepman**

DAILY SIGNAL STAFF WRITER

# Communications

“The Heritage Foundation continues to rank first among free-market groups in Facebook and Twitter followers. It is also first in web traffic.”

—ALEJANDRO CHAFUEN, FORBES, APRIL 10

Jarrett Stepman spent his Fourth of July weekend on the road. In Chicago. At a conference of socialists.

“I never thought I’d find myself in a meeting whose theme was ‘No Borders, No Bosses, No Binaries,’” Stepman says. Still, he was glad he went.

A staff writer for The Daily Signal, Heritage’s multimedia news outlet, Stepman shared his stranger-in-a-strange-land experience in “I Went to a Socialism Conference. Here Are My 6 Observations.” Among his takeaways: These folks are dead serious about hard-core socialism; they are adopting open borders as a litmus test; and they are all-in on gender and identity politics.

The eye-opening story garnered 135,000 views on DailySignal.com and was subsequently picked up by The National Interest and Yahoo! News, among other outlets.

Another highlight of Stepman’s year was the publication of his first book, *The War on History: The Conspiracy to Rewrite America’s Past* (Regnery Gateway, 2019). Unlike socialism, history is right up his alley. With fellow Daily Signal writer Fred Lucas, Stepman has co-hosted Heritage’s “The Right Side of History” podcast for more than two years.

During that time, Stepman has grown increasingly worried that rising generations of Americans lack a decent grounding in civics and American history. “It’s not just that schools no longer inculcate informed patriotism in young Americans,” he explains. “We’re seeing a willful attempt at ‘re-education,’ to reframe our country’s history in ways that turn them against the foundations of America itself.”

Stepman decided to fight back with his pen. Writing the book was “cathartic,” he says, and gave him the opportunity to talk about the problem to big audiences via radio and TV interviews.

But what he has enjoyed most is the chance to talk about the book’s themes in smaller groups. “It’s so energizing to meet with conservative activist groups and see them get excited about fighting back when history is under attack in their communities—especially in their classrooms.”

When Stepman wasn’t hanging out with socialists and meeting with conservatives, he managed to write quite a few columns about his native California and how it has lost its way. For example, he wrote feelingly about the state’s new laws granting protections and privileges to illegal immigrants—what he termed “a mockery of democracy and a war on citizenship.”

Another column on the “self-inflicted” energy blackouts that plagued the state during the fall so impressed Fox News that the outlet asked Stepman to write on the subject. His subsequent column explaining why the blackouts were the predictable result of “long-term dysfunctional governance” became that day’s most-read commentary on FoxNews.com.

## TELLING “THE REST OF THE STORY”

Stepman and his Daily Signal colleagues celebrated two institutional milestones in 2019: the news outlet’s fifth anniversary and its 100 millionth visitor on the web. And throughout the year, they continued to tell important stories—3,300 of them—often covering developments the mainstream media doesn’t want Americans to know about.

Take, for example, the story of Jamie Schupe. Four years ago, Schupe’s transition from male to female was featured in The New York Times. One year later, he decided he was neither male nor female, but nonbinary. When an Oregon judge agreed he could be a third sex, that too, generated massive media coverage.



## Protecting Second Amendment Rights

### AMY SWEARER'S OPENING TESTIMONY

before the House Judiciary Committee on firearms. Her video went viral, with over 2 million views on Twitter and more than 1 million on YouTube.



## On the World Stage

**PRESIDENT KAY C. JAMES APPEARED** on "Fox & Friends," C-SPAN's "Q&A," and the BBC's "World Debate," reaching a worldwide audience of millions. *Washingtonian* magazine named her one of its "Top 150 Women of Washington."

But in 2019, when Schupe decided to go back to being a man, he found no media interest—until he found a platform at *The Daily Signal*. His riveting account of his strange odyssey and the damage done along the way became our most-read story of 2019 and led Laura Ingraham to invite him to share his story on her prime-time Fox News show.

Another hugely popular report was a *Daily Signal* documentary video about Selina Soule, a female high school runner forced to compete against biological males because of Connecticut's policy on transgender athletes. Our most-watched video ever, it garnered more than 2.8 million views on YouTube and an additional 3.8 million views on Facebook.

Kelsey Bolar's feature story, based on the same exclusive interview, attracted 429,000 page views on *DailySignal.com*. Our reporting raised national awareness of the transgender sports issue even as Congress was debating the Equality Act, legislation that could lead to similar challenges for high school girls across the country. The Senate subsequently refused to move the bill forward.

*Daily Signal* contributors don't just cover the news, they break it. For example, Nolan Peterson, our longtime foreign correspondent, was one of only six reporters invited to accompany Secretary of State Mike Pompeo on his early August diplomatic swing through Thailand, Australia, and Micronesia.

The following month, Peterson scored an exclusive interview with the secretary during his official trip to Kyiv. Pompeo spoke to him not only about Ukraine and Russia but also about the situation in Afghanistan. A subsequent *Washington Post* article on the Afghan mission quoted extensively from Peterson's report.

## PUNCHING BACK TWICE AS HARD

The year was not without excitement for *Daily Signal* Editor-in-Chief Katrina Trinko. In May, the Poynter Institute for Media Studies put *The Daily Signal* on its list of unreliable or fake news sites. Trinko responded forcefully with an op-ed that highlighted our perfect rating from *NewsGuard* (a journalist-run organization that rates



Heritage hosted more than 30 reporters attending Vice President Mike Pence’s September speech on the United States–Mexico–Canada Agreement. The event generated 85 media stories.

news sites for credibility and transparency), the journalism standards we hold to, and Poynter’s failure to meet those standards in its own report.

Poynter quickly climbed down, erasing its bogus list from the internet. “We regret that we failed to ensure that the data was rigorous,” Poynter wrote, “and apologize for the confusion and agitation caused by its publication.”

Another controversy brewed in July when YouTube took down our popular video featuring pediatrician Michelle Cretella on dangerous medical treatments being given to children in “gender transition.” According to the world’s biggest video platform, the interview violated its “hate speech” policy.

Cretella is the executive director of the American College of Pediatricians. What YouTube found to be beyond the pale was her matter-of-fact observation: “See, if you want to cut off a leg or an arm, you’re mentally ill, but if you want to cut off healthy breasts or a penis, you’re transgender.”

Again, Trinko picked up her pen. “Censoring a medical doctor doesn’t put YouTube on the right side of history,” she wrote. “It just shows that it’s a big tech company prioritizing the preferences

of the activist left over free speech for all.” We also posted a new YouTube video discussing the censorship. By year’s end, that video had received nearly a quarter-million views.

Meanwhile, other news outlets—Axios, NBC News, The Daily Wire, and more—picked up the story, bringing more heat to bear on the social media giant. An unedited version of the same video on Facebook has now logged more than 3.9 million views.

## STILL THE KING OF SOCIAL MEDIA

Heritage’s digital media operation serves as a role model for think tanks the world around. For the second year in a row, Heritage earned the No. 1 ranking for Best Use of the Internet from the University of Pennsylvania’s Think Tanks and Civil Societies Program.

As the Acton Institute’s Alejandro Chafuen noted in his *Forbes* column, “Heritage Again Ranks First Among Think Tanks for Social Media Impact”: “Heritage has the most Facebook likes ... the most Twitter, Instagram, and LinkedIn followers ... [and] the most monthly website visitors.”





Multimedia Manager Lauren Evans records a Daily Signal interview with former CKE Restaurants CEO Andy Puzder in which he defended capitalism, not socialism, as the economic system best calculated to encourage morality.

Not only is Heritage’s web presence huge, it hits “the right people.” Social media allow us to engage policymakers and young people in a way that meets them wherever they are.

Today, for example, the largest demographic group coming to Heritage.org for information is 25- to 34-year-olds. As for policymakers, a Huffington Post analysis of influential Twitter followers found that Heritage is the No. 1 think tank followed by members of Congress. Only Fox News and President Trump have more followers on Capitol Hill.

Led by Director Maria Sousa, Heritage expanded its digital reach throughout the year. Her team reached a milestone in October when our YouTube channel registered its 100,000th subscriber. The secret to this success: consistently posting new, timely videos. At least, that’s what YouTube Creator Studio cited when honoring us with its coveted Silver Award.

By year’s end, Heritage boasted 2.1 million Facebook fans and 660,000 Twitter followers.

Heritage.org and DailySignal.com logged more than 45 million visits during the 12-month period.

## WORKING WITH—AND THROUGH—TRADITIONAL MEDIA

While the future of media is digital, traditional media remain the primary source of news for most Americans, and Heritage is not about to ignore them.

Our media efforts in shaping the health care debate are a good example of how we engage. In January, our editorial team placed a Bob Moffit op-ed on the pitfalls of Medicare for All with the Tribune News Service. It appeared in well over 30 major newspapers (three of the top 10), as well as six state capital newspapers. The newswire ran two more pieces from the Heritage health expert—one in March, the other in April—each producing the same gratifying results.

Nor was Moffit silent in February—that’s when another national syndicator, Inside Sources, ran another of his exposés of the problems inherent in Medicare for All.

Domestic Policy Studies Director Marie Fishpaw later drove another nail in the Medicare for All coffin, with an op-ed explaining just how much the program would cost typical American families. Her commentary was picked up by more than 50 news outlets, coast to coast.

Heritage messaging on this topic was informed by extensive research conducted by our marketing department. Our messaging was so well thought out and so well received that Media Director Greg Scott was invited to share our research and ideas with the White House. Shortly after Scott's presentation, President Trump announced that his party would become "the party of health care."

Just how high was Heritage's profile on the health reform issue? In November, Business Insider, a publication often not friendly to conservatives, named Fishpaw one of its health care power players. "She's helped conservatives craft health care reforms with the objective of lowering health care costs and increasing choices," Business Insider wrote.

Fishpaw was nominated by Senior Communications Manager Marguerite Bowling. This exemplifies how Heritage has reaped recognition and respect by reaching out beyond the warm cocoon of conservative media to reach "gettable" left-leaning media.

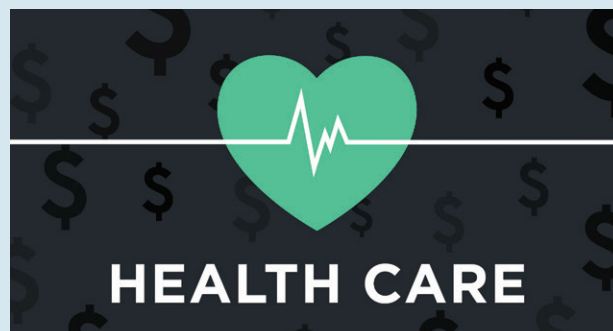
That outreach was constant. Media staff coordinated nearly 200 reporter briefings on key policy issues and made countless individual contacts to keep the media abreast of our solutions. It all paid off with a near-constant Heritage presence in traditional media.

Media staff arranged some 1,800 TV interviews and 3,100 radio interviews during the year. Nearly 10,000 print articles cited Heritage experts and research findings.

Heritage experts presented their recommendations in op-eds which appeared in more than 1,800 major print and online news outlets—and even more smaller papers. Their commentaries appeared weekly in daily papers of six capital cities, reaching lawmakers dealing with many of the issues confronting Washington.

Be it local media, national news outlets, or online, Heritage was there, sharing its principled, conservative solutions with all who had eyes to see and ears to hear. 📺

ERIN GRANZOW



## America's Biggest Issues

HEALTH CARE, IMMIGRATION, spending, election integrity—these are just four of the topics covered in "America's Biggest Issues," a 10-part video series made possible by a grant from Heritage Premier Associate Tom Lewis.

Each concise video segment summarized the core issue at stake, its importance, and the conservative solution best calculated to fix the problem. No fancy bells and whistles, just straight talking, direct to camera, by Heritage experts.

The videos proved to be winners, attracting more than 200,000 viewers. Our digital team extended the reach further by "ripping" the audio from the videos and republishing the content as a 10-part podcast series.



The Daily Signal and multimedia teams work together to record podcasts on the go. At the 2019 President's Club Meeting, they recorded 10 podcasts right in the middle of all the action.

# Exploding Myths; Winning Millennial Minds

**IN THE BATTLE TO WIN HEARTS AND** minds in the digital space, Heritage has a secret weapon: our interns. Case in point: “Millennial Myths,” a podcast launched in July thanks to intern Samantha Renck.

“Millennial Myths” tackles policy issues where younger Americans have been seriously misled. In the first episode, for example, Renck debunked pro-socialist arguments by interviewing Daniel DiMartino, a college student who fled socialist Venezuela. The podcast series proved so popular, we renewed it for a second season, hosted by intern Tiffany Roberts. Among the issues covered to date: the Electoral College, identity politics, the gender “wage gap,” Medicare for All, and climate change.

Thanks to creative outreach initiatives such as “Millennial Myths,” Heritage’s popularity among young media consumers surged in 2019. For example, our following on Instagram nearly doubled, reaching 13.5 million people with video content and posts created specifically for a younger audience. Today, more than a third of our followers are under 34.

“Millennial Myths” wasn’t the only new podcast Heritage launched in 2019. Vice President Jack Spencer and Roe Institute Director Paul Winfree now co-host “Liberty & Justice for All,” a twice-a-month podcast featuring fascinating interviews on all things pertaining to the economy. Among their guests in 2019: Google Chief Economist Hal Varian, Manhattan Institute Senior Fellow Oren Cass, and Andrew Cryan, managing director and executive producer at Econ Films.

Subscribe to these and other Heritage podcasts on Apple Podcasts, Google Play, or other podcast subscription services.

## HERITAGE HAS SIX OTHER SHOWS IN OUR PODCAST ROTATION:



### “HERITAGE EXPLAINS”

Hosted weekly by Michelle Cordero and Timothy Doescher, each episode presents an entertaining mix of media clips, personal stories, and interviews with Heritage experts breaking down the week’s biggest news stories.



### “SCOTUS 101”

Hosted weekly by Elizabeth Slattery, each episode reports what’s happening and what’s coming up at the Supreme Court and often features guest lawyers and journalists, as well as trivia.



### “HERITAGE EVENTS”

An ad hoc production, this podcast carries same-day audio of every public program at Heritage.



### “THE DAILY SIGNAL PODCAST”

Hosted daily by Daily Signal Editor-in-Chief Katrina Trinko and our team of reporters, the show recaps the day’s top stories, plus analysis from Heritage experts and other newsmakers.



### “PROBLEMATIC WOMEN”

Hosted weekly by Multimedia Manager Lauren Evans and Daily Signal News Producer Virginia Allen, the podcast showcases strong, conservative women and the hypocrisy of liberal feminists.



### “THE RIGHT SIDE OF HISTORY”

This biweekly show, hosted by Jarrett Stepman and Fred Lucas, offers surprising insights into historical events and pushes back against the Left’s attempts to rewrite history.

# 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 2019 successes.



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\*as of 12/31/2019



Left to right: John Malcolm, Andrew McIndoe, Carolyn Arredondo, Caesar Arredondo, and Mike Gonzalez.

## Making a Difference ... Permanently

**A NEW YORK REAL ESTATE** investor, Caesar Arredondo had supported Heritage's broad research program for years. In 2019, he decided to "go big" in a way that would accomplish three goals: encourage patriotic assimilation, discourage identity politics, and permanently attach his family's name to The Heritage Foundation. His \$1.5 million gift established, for all time, the Angeles Arredondo E Pluribus Unum Fellowship. Heritage designated Mike Gonzalez as our first Arredondo Fellow.

# Distinguished Fellows

A select few of our scholars are designated as Distinguished Fellows. 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 2019, Heritage was home to five distinguished fellows.



**RONALD REAGAN  
DISTINGUISHED  
FELLOW  
EMERITUS  
EDWIN MEESE III**

There's Edwin Meese III, of course, our Ronald Reagan Distinguished Fellow Emeritus. His contributions won national recognition when President Donald Trump awarded him the country's highest civilian honor, the Presidential Medal of Freedom. (See p. 14.) Meese continued to play a leadership role in the conservative movement, leading our biannual Legal Strategy Forums, as well as monthly coordinating meetings of freedom-based public interest law groups.



**DISTINGUISHED  
VISITING  
FELLOW RICK  
DEARBORN**

Distinguished Visiting Fellow Rick Dearborn is no stranger to the halls of power in Washington—those inside government as well as out. Over the past 30 years, he has served two U.S. presidents and six U.S. senators. He also served as Heritage's director of congressional relations from 1993 to 1996.

In 2018, he returned to Heritage to take charge of a new initiative: the Federalism Project. In 2019, he worked on developing a master plan for

devolving power back to the states and the people—as the Founders intended.

He also advised Vice President Tommy Binion on how best to maneuver Heritage policy recommendations through the executive branch. Thanks to Dearborn’s tenure as President Donald Trump’s deputy chief of staff, his insights and contacts proved invaluable, helping get Heritage research into the right hands before final decisions were made.



RONALD REAGAN  
DISTINGUISHED  
FELLOW  
BECKY NORTON  
DUNLOP

Becky Norton Dunlop, our Ronald Reagan Distinguished Fellow, main-

tained a busy schedule. Her advice on policy and personnel matters is regularly sought by administration officials. In the first quarter of the year alone, she met with officials at the White House, Peace Corps, Office of Personnel Management, and the departments of Labor, Justice, Interior, State, Transportation, and Homeland Security.

She was also involved in building a principles-based conservative movement in Brazil, meeting extensively with elected and appointed government officials as well as faith and civil society leaders. And her leadership in building the Association of American Educators, an alternative to the teachers’ unions, proved quite valuable to allies running union opt-out campaigns across the country.



DISTINGUISHED  
FELLOW IN  
CONSERVATIVE  
THOUGHT  
DR. LEE  
EDWARDS

Our Distinguished Fellow in Conservative

Thought, Dr. Lee Edwards, is widely regarded as the leading historian of the conservative movement. In 2019, however, he concentrated

much of his attention on combatting a current problem: the growing acceptance of socialism in America.

In a series of commentaries, Edwards documented the dangers and disappointment of this seductive ideology. Among these writings were: “Socialism: A Clear and Present Danger” (for FoxBusiness.com), “Three Nations That Tried Socialism and Rejected It” (National Review), “The Totally, Utterly Irrefutable Case Against Socialism” (The Daily Signal), “THESE Are the Most Telling Failures of Socialism” (Fox News), and “The God That Failed ... Over and Over Again” (American Thinker).

In August, C-SPAN aired “In Depth With Lee Edwards,” in which he discussed *The Conservative Revolution*, *Goldwater*, and *Just Right: A Life in Pursuit of Liberty*—just three of his more than 25 books. During the two-hour interview, he also gave a personal testimony—about how his exposure to communism in Europe turned him into a lifelong conservative.



DISTINGUISHED  
VISITING FELLOW  
STEPHEN MOORE

Distinguished Visiting Fellow Stephen Moore continued to write his weekly syndicated column, while also contributing analyses

to The Wall Street Journal, Fox News, The Hill, and other news outlets.

In addition to commenting on the news, he made news in 2019 with groundbreaking research that showed median household income had soared by \$5,000, to an all-time high of \$66,000, in less than three years.

These findings triggered two completely opposite reactions. President Trump enthusiastically tweeted out the good news about middle-class income gains and took to reciting Moore’s statistics in virtually every speech.

The Left, however, tried to bury them. When that failed, they simply denounced his findings—ignoring the fact that they were based wholly on reliable economic data from the U.S. Census Bureau. 📌

2019  
*Annual Leadership Conference*  
THE HERITAGE FOUNDATION



Members socializing at the 2019 Annual Leadership Conference in California.

# The Secret of Heritage's Success: Our Members

The 2018 elections weakened the hand of conservative lawmakers and emboldened the Left. Liberal leaders took up the gavel in the House and were pushed even further left by the media's newest darlings: "The Squad." Medicare for All, the Green New Deal, and other radical proposals came hard and fast.

But Heritage members were having none of it. They fought back by giving as never before to the one think tank uniquely capable of stopping the Left's agenda in its tracks.

At our Annual Leadership Conference in April, our generous donors contributed a record-breaking \$14 million to Heritage, thanks to a matching gift challenge issued by our Board of Trustees.

That energy continued throughout 2019. By year's end, our incredible supporters, now numbering more than a half million, contributed nearly \$153 million in gifts, pledges, and estate commitments to Heritage and Heritage Action.

This outpouring of support is humbling and most deeply appreciated. It enabled us to achieve the many victories noted in this report—and more.

As gratifying as those victories are, some of our best experiences in 2019 came when we at Heritage were able to spend time with our members in meetings across the nation. We held 25 regional member meetings throughout the year, including unforgettable events with Jordan Peterson in New York City and Sebastian Gorka in Naples, Florida. Together, we drilled down on the issues, discussed alternative solutions, brainstormed new ideas, and forged new partnerships.

The crown jewel of the year was our annual President's Club Meeting, which included our first-ever Heritage Honors Gala. Headlined by Vice President Mike Pence, the gala was a star-studded evening of unabashed patriotism and celebration. And even in October, we had much to celebrate, from victories on deregulation to a strengthened military and border security, from new protections for the unborn to the appointment of scores of constitutionalist judges.

When we look back at 2019, we can't help but be thankful for our members: Americans who understand the amazing legacy and responsibility passed down to us by our nation's Founders. Thanks to you, America—and Heritage—is stronger than ever. We enter 2020 on a strong financial footing and well prepared to meet the challenges ahead.

## Membership Levels

**HERITAGE WELCOMED 79,000** new members in 2019. Our range of membership levels and benefits can accommodate all.

### LEVEL STARTING AT

Basic .....	\$25
Patriots Club .....	\$100
Young President's Club .....	\$250
President's Club .....	\$1,000
Executive Committee .....	\$2,500
Premier President's Club .....	\$5,000
Associate .....	\$10,000
Executive Associate .....	\$25,000
Premier Associate .....	\$50,000
Founder .....	\$100,000
Trustees' Circle .....	\$500,000
Chairman's Circle .....	\$1,000,000

For details on the benefits attached to each level, please call (800) 546-2843 or visit [heritage.org/donate](https://heritage.org/donate).





1. (Left to right) Ben Franco; Camille Parra (President's Club and Heritage Legacy Society); Sarah Scaife Foundation President and Heritage Trustee Michael Gleba (Chairman's Circle); Heritage's E.W. Richardson Fellow James Carafano (President's Club); and Jennifer Gleba attend Heritage's Annual Leadership Conference.
2. Actor and philanthropist Gary Sinise speaks at Heritage's Annual Leadership Conference.



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*Twenty Founders have asked to remain anonymous.*

# Meet Young President's Club Member Elizabeth Anderson

My first job out of college was teaching math in a Los Angeles County school. I probably shouldn't have been surprised, but I was, that so few of my peers shared my passion for the ideals upon which our country had been founded.

When I read the writings of the Founding Fathers, I fell in love with the idea of freedom from overbearing government. I was inspired by ideas such as: I—not government—am most able to determine my own happiness, only free men own guns, and overbearing taxation is theft.

The America I know is truly a daring idea. The Constitution magnificently parses the responsibilities of government and the freedoms of people. Laws matter. Policy matters. It affects people's lives.

I felt deeply about personal responsibility and freedom from government oppression.

As a public-school teacher, I saw public-sector unions undermine schools. Education determines people's futures, and students who are poorly educated become adults who suffer. In 2019, there is no excuse for poor educational services.

But I found that most of the adults I knew didn't talk about appropriate taxation or about holding government accountable.

So, I searched for champions of conservatism, and I found The Heritage Foundation. And I was very happy to find the thoughtful, intelligent, informed opinions that Heritage provides. I love receiving Heritage emails to stay informed.

My husband, Colin, a Navy corpsman with four deployments and a Purple Heart, has always been happy to support



Elizabeth Anderson and her family.

The Heritage Foundation. He tells stories of the many countries he's visited and how their governments determine the opportunities for their citizens.

We want personal freedom for everyone, so they can take pride in determining their own lives—without interference from a burdensome government. We want every child, not just our four, to have access to excellent education.

That's why we are happy to invest in The Heritage Foundation.

*Editor's note: Elizabeth Anderson has been a Heritage member since 2010.*

*Anyone age 40 years or younger can become a Young President's Club member with a donation of \$250 or more. To learn more, go to [heritage.org/donate](https://heritage.org/donate).*



## Honoring Donor Intent

WHEN GIVING TO ANY nonprofit, you should be able to rely on the organization to do three things:

- Use your gift to advance its mission,
- Honor any restrictions you place on the gift, and
- 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.

BAUMAN PHOTOGRAPHERS



1. (Left to right) Jennifer Hawks (Executive Committee), Howard and Jill Sadkin (Associates, Heritage Legacy Society), and guest Valarie Hill.
2. Stephanie and John Hanson (Founder-level supporters of The Heritage Foundation and Heritage Action for America).
3. (Left to right) Jeremy and Ruy Bautista with their aunt, Jeanne Haskell (Founder), and uncle, Leonard Robinson (Founder, Heritage Legacy Society).



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1. George and Joan Beck (Associates) pose with Heritage Vice President of Development Andrew McIndoe.
2. Heritage Trustee and Heritage Action for America Board Member Jerry Hume pays a visit to the Heritage Action headquarters.
3. Janet and Richard Shirk (Executive Associates) with Heritage President Kay C. James.
4. (Left to right) Catherine Burke (President's Club); Mary Hurst (Associate); Heritage Vice President Charmaine Yoest; Cynthia Dunlop (President's Club, Heritage Legacy Society); and Susan Conger (Executive Committee).

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 Sophia and William J. Casey Foundation  
 Mr. and Mrs. Bill Chapin  
 Mr. and Mrs. Derwood S. Chase, Jr.  
 The Chisholm Foundation  
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 Mr. James K. Cluverius  
 Mr. and Mrs. Thomas W. Colbert, Sr.  
 Mr. Steven Conrad  
 Consumer Technology Association  
 Mr. and Mrs. Lamot D. Copeland, Jr.

# Silent No More: Meet Heritage Member Robert G. Fuller, Jr.

In 1954, 16-year-old Bob Fuller landed his first summer job: picking beans for 15 cents a box. It gave him gas money for his Model A Ford, and life was good.

He switched summer jobs in college—working as a telephone lineman. It was neither easy nor entirely safe. But Fuller loved it.

“I was getting my hands dirty again,” he recalls. “I had spikes on my boots, climbing telephone poles, working with blue-collar guys smoking Camels. I wasn’t playing golf at the country club.”

Fuller comes from a well-to-do family, but you’d never know it. Throughout his life he has eschewed elitism. But he’s also embraced the free market. He recalls that in college “most of my professors were firm believers in FDR and the idea that government was the solution to mankind’s problems.”

At the time, Fuller says, he lacked the intellectual firepower to challenge his liberal-minded professors. But a lucky coincidence inspired his will to stand up to the elites: A prep school classmate, Jim Burnham, Jr., was the son of one of the founders of National Review.

“Little did the librarian know,” Fuller says, “when she put the magazine on the shelf as a courtesy to Burnham, what effect it would have on me.”

In 1964, Fuller graduated from law school. He practiced law in Maine for the next 40 years. He also eventually became a reserve officer in the Judge Advocate General’s Corps.

Fuller describes himself as a “latecomer conservative activist.” He did not become a member of The Heritage Foundation until 2009.



Founder Robert G. Fuller, Jr.

Though technically a member of the so-called Silent Generation, Fuller hasn’t been silent since becoming a Heritage member. During a 2019 visit to Heritage’s headquarters, he grabbed a stack of Heritage Pocket Constitutions, which he leaves in strategic places. “They’ll do far more good in a doctor’s office than an outdated copy of People magazine,” he laughed.

Fuller sees giving to Heritage as an investment:

*I served in the armed forces. My goal is to concentrate my financial firepower through an organization that not only represents my ideals, but also has the resources and talent to present them to those in power. The Heritage Foundation has passed all my tests and exceeded my expectations.*

Through his generosity—and by allowing us to share his story—Fuller has certainly exceeded ours.

Mr. David R. Cummock  
 Mr. William R. Dahlgren  
 Dr. Tony Dale  
 Mr. and Mrs. Jason Damron  
 Mr. William L. Davis III  
 Ken W. Davis Foundation  
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 The Lundy Fetterman Family Foundation  
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 Foundation For A Better World  
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 Mr. Chad Goote  
 Mrs. Kimberley B. Granger  
 Mr. Richard Grant  
 Dr. William R. Green  
 Mr. and Mrs. Michael H. Guetz  
 Mr. Jean P. Haberichter  
 Mrs. Jan Hair  
 Mr. and Mrs. John Hajjar  
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 Mr. and Mrs. James Heckman  
 Mr. and Mrs. John W. Hedberg  
 Mr. John C. Heenan  
 Mr. John Heimkes

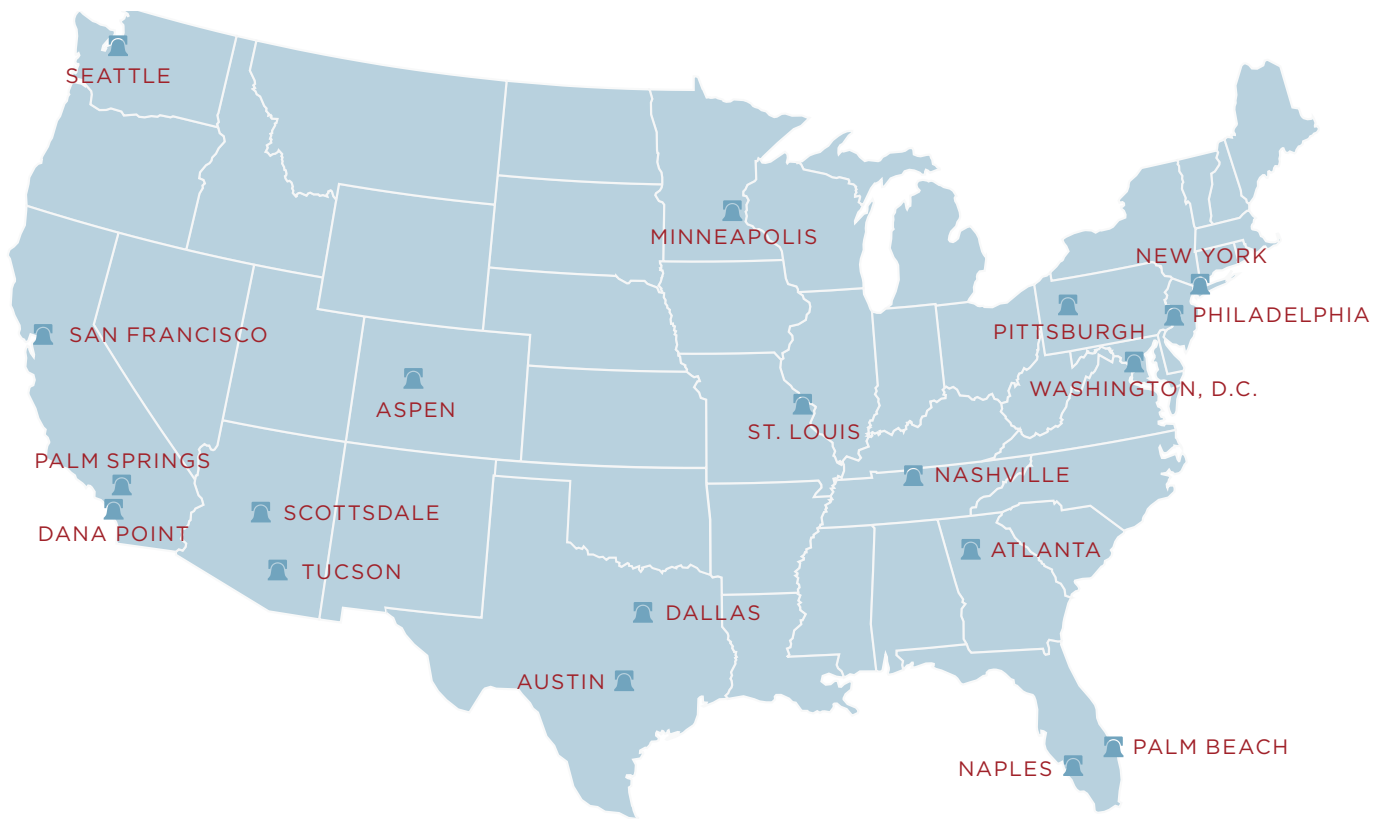
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 Mrs. Patricia Houston  
 Honorable and Mrs. Ralph T. Hudgens  
 Mr. Neal Hunt  
 Dr. David L. Hurt  
 The Huston Foundation  
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 Dr. William D. Jones, M.D.  
 Ms. Rebecca L. Julian  
 Mr. and Mrs. Paul Kalmbach  
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 William S. Knight Foundation Inc.  
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 Legett Foundation  
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 Mr. and Mrs. Edward McManus  
 Mr. Denman K. McNear  
 Ms. Patricia K. McPherson  
 Ms. Frieda S. Mecray  
 The Honorable J.W. Middendorf II  
 Mr. Harvey L. Miller  
 Mr. and Mrs. Christopher S. Moody, Sr.  
 Mr. and Mrs. J. Michael Moore

Mr. and Mrs. William H. Moore  
 Mrs. Sheila K. Morgan  
 Mrs. Carol A. Morris  
 The Ted Muhs Foundation  
 Mr. Douglas L. Murray  
 Melvin J. and Harriet H. Naser  
 Charitable Trust  
 Mr. David Nelson, Jr.  
 Mr. Peter C. Newell  
 Mr. Richard Nord  
 Mr. Tom O'Connor  
 Mr. and Mrs. Terry O'Day  
 Mr. Donald A. Oeters  
 Mrs. Franca G. Orefice  
 Orscheln Management Company  
 (Alkin Co.)  
 Norma Pace Foundation  
 Mr. and Mrs. Jack A. Palmer, Jr.  
 C.N. and Maria Papadopoulos  
 Charitable Foundation  
 Mr. David P. Parker  
 Mr. and Mrs. Douglas Parsons  
 Mr. and Mrs. Thomas C. Patterson  
 Mr. James L. Patton  
 The William Penn Foundation  
 Special Gifts Program  
 Mr. David Perdue  
 Mr. Leroy D. Peterson  
 John William Pope Foundation  
 Mr. and Mrs. Reinhold Preik  
 Mr. and Mrs. John H. Quinn, Jr.  
 Ms. Fern S. Randall  
 Dr. and Mrs. John E. Reese III  
 Dr. and Mrs. Michael E. Reif  
 Capt. and Mrs. Henry S. Reinke  
 Mr. and Mrs. John Rigsby  
 Mrs. Lisenne Rockefeller  
 Mr. and Mrs. Rick J. Rodell  
 Mr. and Mrs. John B. Rothenberger  
 Mr. and Mrs. Howard Sadkin  
 Mr. Roger L. Schaller  
 Mr. Robert H. Schwarzmann  
 Ms. Marguerite A. Scribante  
 Mr. William A. Sharpsteen  
 Mr. and Mrs. David Shedd  
 Mr. David Smith  
 Mr. Clark Smyth and Mrs. Shelley Emerick  
 Mr. and Mrs. Neil Snodderly  
 Mrs. Shirley M. Sontheimer  
 Mr. and Mrs. Brad V. Spearing  
 Mr. and Mrs. Nicholas J. St. George, Sr.  
 Mr. and Mrs. Clarence A. Stephan  
 Stiles-Nicholson Foundation  
 Mr. and Mrs. Robert C. Stites  
 Mr. and Mrs. Larry Stockline  
 Mr. and Mrs. Roger W. Stone  
 Ms. Mary E. Stratton  
 Strong Foundation Trust  
 Mr. and Mrs. Joseph D. Swanson  
 Mr. and Mrs. Gary L. Swenson  
 Mr. and Mrs. Ronald W. Swenson  
 The Sidney A. Swensrud Foundation

# Keeping Connected

We're committed to keeping our members informed about what's going on in Washington. And we're just as committed to learning what's on their minds. That's why we hold member meetings across the country throughout the year.

**In 2019, we hosted 21 regional member meetings in 19 cities.**



Mr. and Mrs. Ward Sylvester  
 Mr. R. J. Taylor  
 Mr. Kenneth R. Tiek  
 Tippins Foundation  
 Mr. and Mrs. Stephen C. Trice  
 Mr. Phillip N. Truluck and  
 Ms. Ann B. Wrobleski  
 Mr. E. R. Turner  
 Mr. and Mrs. Tom Vande Guchte  
 Mr. James R. Venner  
 Mr. James R. Voss  
 Mrs. Delma L. Wagstaff  
 The Walker Foundation  
 Mr. and Mrs. William L. Walton

Mr. Peter C. Wasilkoff  
 Mr. Charles R. Watkins, Jr.  
 Mr. and Mrs. James F. Webert  
 Mr. Lester L. Weindling  
 Mr. and Mrs. Ronald B. Weinel  
 Mrs. Nancy D. Weiss  
 Mr. Stephen D. Weiss  
 Marion G. Wells Foundation  
 Mr. and Mrs. Stephen West  
 Samuel L. Westerman Foundation  
 Westmeath Foundation  
 Mr. Tom L. Wheeler III  
 Ms. Ronna L. Whiteside  
 Mr. Thomas W. Wiley

Mrs. Evelyn F. Williams  
 Ms. Roberta Winters  
 Mr. James Wintersteen  
 Ms. Daisy Wisniewski  
 Mr. Frank E. Witt  
 Mr. Daniel H. Wood  
 Mr. and Mrs. Thomas E. Workman  
 Mr. John G. Wright  
 Mr. and Mrs. Ronald B. Wrobel  
 Mr. William M. Young, Jr.  
 Mr. A.C. Zucaro

*Forty-two Associates have asked to remain anonymous.*





# Preserving Freedom for Future Generations

“You will never know how much it has cost my generation to preserve your freedom. I hope you will make a good use of it.”

—JOHN ADAMS

Our Founding Fathers dedicated their lives, their fortunes, and their sacred honor to secure the freedoms we enjoy today. Members of our Heritage Legacy Society understand the depth and importance of that commitment—and they’ve followed that example.

Legacy Society members have remembered Heritage in their wills, trusts, or other planned gifts. In this way, these modern-day patriots are safeguarding America’s founding principles for future generations. The Heritage Legacy Society is honored to welcome the following new members in 2019:

- Mr. Robert B. Abraham
- Ms. Lynn Ackerman
- Mr. R.H. Allen
- Mr. and Mrs. Ron Allison
- Mr. Jim Arthur
- Mr. David Augustin
- Mr. Ronald Bailey
- Mr. Linton F. Banwell
- Mr. R. Michael Basler
- Mr. and Mrs. Joseph Bawduniak
- Miss Karen Bodner
- Mr. Ulrich Boesch
- Mr. James Bonney
- Ms. Ann Hunt Brefka
- Mr. Dennis Brink
- Mr. and Mrs. Scott Brittin
- Mr. B.J. Brockett
- Ms. Nancy M. Brown
- Mr. Andy Bull
- Ms. Joan Bullock

- Ms. Nancy Cassel
- Mr. and Mrs. Mearl G. Clayton
- Mr. Gary Coats
- Mr. David A. Cole
- Mr. Jose and Dr. Catherine Cornejo
- Mrs. Nancy Courts
- Mr. Stephen L. Craig
- Mr. Ed Crowson
- Mr. Steve Daniels
- Dr. and Mrs. J. Michael Decenzo
- Ms. Barbara Despain
- Mrs. Jean Deupree
- Mr. Jack A. Dienst
- Mrs. Nancy Doane
- Mr. Roy Dollard
- Ms. Judith D. Domkowski
- Mr. David W. Druschel
- Mr. Thomas J. Dyer
- Ms. Harriet J. Eastburg
- Mr. Tommy Ebe

- Mr. Donald Ehr
- Mrs. Elizabeth P. Ehrhard
- Mr. Joe M. Eldridge
- Mr. Gene Engles
- Dr. and Mrs. James E. Enstrom
- Ms. Mary M. Evans
- Mrs. Jane S. Fields
- Mr. and Mrs. John R. Fisk
- Mr. Kim Frazier
- Ms. Pauline Gaffney
- Mr. and Mrs. George Galic
- Mr. Michael R. Gallagher
- Mr. and Mrs. and Mrs. Iry Gamal
- Mrs. Gail Garbin
- Mr. Raymond A. Gardner
- Mr. Robert Garman
- Mrs. Rosemary Gervais
- Ms. Sherry Giles
- Mr. Armand F. Girard
- Mr. Robert Goldenthal

CHARLES GEER

# Spotlight on Sam Hammons, Heritage Legacy Society Member

It was during the energy crises of the 1970s that Heritage Legacy Society member Sam Hammons acquired much of his expertise on energy policy.

Working in the offices of Oklahoma lawmaker Carl Albert, Hammons had a front-row seat to some of the most tumultuous political and cultural debates in American history. Working with Albert in the statehouse and then in the nation's capital, Hammons gained a lifetime's worth of experience, all before the age of 30.

It propelled him into a lifetime of shaping public policy—particularly energy policy—in the White House as well as in his beloved home state of Oklahoma. Today, Hammons continues to act as a successful energy and financial adviser. And he remains committed to the fight to keep America true to its founding principles.

Here's how he sees it:

*Every great country or empire makes the assumption that 'it' won't happen to them—'it' being their decline or destruction.*

*Unfortunately, history has proven otherwise. There are certainly some empires that have slipped into mediocrity, but the vast majority have dramatically and tragically chosen their path, usually due to lack of understanding of history or the lack of will to change course.*

As to why he and his wife, Joy, chose to include Heritage in their estate plans, Hammons explains it this way:

*It's important for me to know that some of my estate will help perpetuate the principles upon which our country was built. We can't forever live in the afterglow of our Founding*



*Fathers' amazing talents, insights, and the basic foundation they laid for us. Now it's up to us.*

*Given how destructive societal apathy can be, I guess you can say our decision to include an estate gift for Heritage is a proactive way to appreciate where our freedoms come from, stand up for them, protect them, and treasure them.*

*I know as an individual I can make a difference, but certainly with others, we can make an even greater difference. Heritage is an organization we can believe in and can trust not to drift from its moorings, and this makes us all the more comfortable in our decision.*

# With Gratitude

We honor the memory of those Heritage Legacy Society members whose gifts we received in 2019.

Mrs. Hazel S. Adams  
Mr. Charles H. Adler  
Mr. Daniel K. Allison  
Ms. Anne Alverson  
Mrs. Lenore C. Anderson  
Mr. Richard F. Aster, Jr.  
Mr. Gerald Balnius  
Mr. Aloysius Barr  
Mr. James Bartels  
Mr. Joseph M. Bartos  
Miss Elaine S. Beeman  
Miss Martha Brooks  
Mr. Roger A. Brown  
Mr. Whitney A. Brown  
Mr. Robert A. Brucato  
Mrs. Jessie J. Carlstedt  
Mr. Victor Carman  
Mr. Don E. Carter  
Mrs. Marilyn Cassizzi  
Mr. Steven Conrad  
Dr. Walter E. Conrad  
Mr. John H. Corson  
Dr. Robert W. Crecca  
Mr. J.L. Cronin, Jr.  
Mr. David R. Cummock  
Mr. Geary Cutting  
Mrs. Valerie Davis  
Ms. Rebecca Sue H. De Shazo  
Mr. Cortlandt S. Dietler  
Mr. William L. Doctorman  
Mr. and Mrs. John K. Doherty  
Mr. Douglas Ehr  
Mr. Keaton L. Endsley  
Mr. J. R. Fawley  
Mr. A. H. Feige, Jr.  
Mr. Charles W. Fischer, Jr.  
Mr. Robert C. Gerholz, Sr.  
Mr. Bruce Grant Steinmann  
Mr. John Grayson  
Mrs. Berniece Grewcock  
Mr. and Mrs. Robert E. Hahn  
Mr. Franklin D. Halladay  
Mrs. Harriet B. Hatch  
Mr. John Heimkes  
Mr. John G. Hoad  
Mr. John E.N. Howard  
Mr. Edgar J. Huff  
Mr. Herbert Kameon  
Mrs. Charlotte Kowalewski  
Mr. Thomas E. La Clair  
Dr. James T. Leslie  
Mr. William L. Logue  
Mr. Robert W. MacDonald  
Mr. Robert W. Mair

Mr. Philip A. Mazur  
Mr. Kenneth McFall  
Mr. John McKown  
Ms. Frieda S. Mecray  
Mr. Holbrook T. Mitchell  
Mr. Donald A. Moeller  
Mrs. Sheila K. Morgan  
Mr. Terence H. Murphree  
Mr. Robert S. O'Brien  
Mr. David P. Parker  
Mr. Lowell A. Paulsen  
Mr. George O. Pfaff  
Mr. Russell D. Phelon  
Mrs. Geneva M. Phillips  
Mr. Al Preston  
Ms. Ann G. Prothro  
Mr. Phillip C. Quinn  
Mr. Edgar C. Raber  
Mr. Willard E. Rapp  
Mr. Edward E. Renfro  
Mrs. Merrilyn Richardson  
Mr. F. Arthur Roth  
Allison and Dorothy Rouse  
Mrs. Helen Sanderson  
Mr. Victor L. Sanko  
Mr. Herbert M. Schendel  
Mr. Walter Schmid  
Mr. Arnold N. Schuppert  
Mr. Mark Selko  
Mr. William A. Sharpsteen  
Mr. Daniel R. Shawe  
Mrs. Lola Shearer  
Mr. Harold Siegel  
Ms. Margaret Snowdon  
Mrs. Dorothy M. Stephens  
Mr. Stuart Stephenson, Jr.  
Mr. Lowell F. Steusloff  
Mr. Howard M. Stiles  
Ms. Marielouise Stone  
Mr. Stephen L. Stromberger  
Mr. Thomas Tipi  
The Honorable Oliver Transue  
Mr. E.R. Turner  
Mr. Richard S. Voorhees  
Mr. Charles W. Walton  
Mr. Edward Weyer  
Dr. John G. Whinery  
Ms. Roberta Winters  
Ms. Daisy Wisniewski  
Mr. Jack J. Zeilenga  
Mr. Robert K. Zelle  
Mr. Thomas R. Zucker

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

Mr. and Mrs. Edward Gordon  
Ms. Nancy Graham  
Mr. Delbert P. Granlund  
Ms. Linda Greenberg  
Mr. Allan L. Grimm  
Mr. Thomas Grisez  
Mr. Ralph Hamilton  
Mr. and Mrs. Robert J. Hamilton  
Mr. Allen Hansen  
Mr. Lewis P. Hanson  
Mr. Thomas J. Harper  
Mr. Lyle Henning  
Mr. Lyle E. Hill  
Mr. William Hillman  
Mr. Daniel E. Hockett  
Mr. Edward Hotchkiss  
Mr. Jan Hottinga  
Mr. Michael M. House  
Mrs. Patricia Houston  
Dr. David L. Hurt  
Miss Donna M. Ianacone  
Mr. Paul Jenson  
Mr. Robert J. Johnson  
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Mrs. Jacqueline Juvenal, USA (Ret.)  
Mr. Dan Keating  
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Mr. Charles W. Kirby  
Mr. Stanley Klimek  
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Mr. and Mrs. Anten Kraemer  
Mr. and Mrs. Richard L. Krieger  
Ms. Judi L. Lanigan  
Mr. L. Lauahi  
Ms. Carol Leihl  
Mr. Lee Lemke  
Mr. David Lentz  
Mr. Donald M. Lewis  
Mr. and Mrs. David W. Light III  
Mr. and Mrs. Steve H. Lyons  
Mr. Michael C. Maibach  
Mr. Todd T. Marchant  
Ms. Jill M. Marks  
Mr. Anthony Marotta  
Mr. James Marshall  
Ms. Julie M. Marsland  
Mrs. Elizabeth M. Matthews  
Mr. Philip A. Mazur  
Mr. and Mrs. Michael McCabe  
Mr. Larry McCarroll  
Mr. and Mrs. J. Michael McDonald  
Mr. and Mrs. Edward McManus  
Mr. John Meloy  
Mr. George A. Menghi  
Mr. John Mestek  
Ms. Nadine Miele  
Mr. Gary F. Miller  
Mr. Joseph Mohalski  
Mrs. Corrine Moller  
Mr. William Morawski



1. Ed and Sherry Gilbertson (Associates, Heritage Legacy Society).
2. Heritage Trustee Tony Saliba (Founder) speaks at Heritage's 2019 Annual Leadership Conference.
3. (Left to right) David Ellis; father Robert Ellis (Associate); and Douglas Waikart (Heritage Executive Associate, Heritage Action Associate, and Heritage Legacy Society) at Heritage's 2019 President's Club Meeting.

Mr. Walt Moreno  
 Ms. Henrietta Morris  
 Dr. L. Michael Moskovis  
 Mr. Fred H. Muhs  
 Mr. and Mrs. Carl Murray  
 Mrs. Doris Oase  
 Mr. John Oehlert  
 Mr. William H. O'Neill  
 Mrs. Francisca A. Onyenche  
 Mr. Jamie Oxley  
 Mr. Charles Pate  
 Mr. James L. Patton  
 Mr. Anthony M. Paula  
 Mrs. Christa G. Percopo  
 Mr. Grant Phillips  
 Mr. Joseph F. Piazza  
 Mr. Patrick Piper  
 Mr. James P. Plant  
 Mrs. Helen L. Prine  
 Mr. and Mrs. Alan Raker  
 Mr. Richard D. Ramsdell  
 Mrs. Marilyn Richardson  
 Mr. Clarence L. Richmond  
 Mr. and Mrs. Fletcher Robeson

Mr. Leonard D. Robinson  
 Mrs. Tom Robinson  
 Ms. Olga Robinson  
 Mr. and Mrs. William Rooker, Jr.  
 Mr. Ernest Root  
 Mr. N. Richard Sanders  
 Mr. James F. Scheid  
 Mr. Everett Schmidt  
 Mr. and Mrs. Myron Senyk  
 Mrs. Myron Shervheim  
 Mr. and Mrs. Daniel Shorey  
 Mr. Glen C. Simmons  
 Mr. William A. Sluhan  
 Mrs. Shelby Smith  
 Ms. Maggy Smith  
 Mr. John R. Speicher  
 Mr. Mike M. Steffen  
 Mr. John E. Stoessel  
 Mr. and Mrs. James Sullivan  
 Mr. David Braxton Taylor  
 Mr. Ray Taylor  
 Mr. and Mrs. Kenneth R. Tiek  
 Mr. and Mrs. F.M. Titshaw  
 Mr. and Mrs. Donald F. Turano

Mr. Peter A. Twight  
 Dr. and Mrs. John R. Vasko  
 Mrs. Martha Vera  
 Ms. Sandra J. Wagner  
 Mr. Frank L. Wang, Jr.  
 Mr. Lowry Watkins, Jr.  
 Mr. Glenn R. Weber  
 Mrs. Maryellen Weber  
 Ms. Maggie Welch  
 Ms. Carol Whiddon  
 Mr. Thomas White  
 Dr. Richard W. Whitman  
 Mr. Jon P. Wilcox  
 Mr. Calvin N. Willis  
 Mr. Raymond Wodicka  
 Mr. William Yarbrough  
 Mr. John A. Yeager  
 Mr. Craig A. Young  
 Mr. William M. Young, Jr.  
 Mr. and Mrs. Garry Zatarain  
 Mr. Walter Zettlemoyer

*Twelve Heritage Legacy Society members wish to remain anonymous.*

# 2019 Financial Statements

## STATEMENT OF FINANCIAL POSITION\*

As of December 31, 2019

### ASSETS

Cash and cash equivalents	\$9,545,473
Receivables	5,474,168
Prepayments and other assets	805,868
<b>Total current assets</b>	<b>15,825,509</b>
Investments	259,665,729
Receivables, net	3,941,691
Property and equipment, net	86,141,067
<b>Total long-term assets</b>	<b>349,748,487</b>
<b>TOTAL ASSETS</b>	<b>\$365,573,996</b>

### LIABILITIES AND NET ASSETS

Accounts payable and accrued expenses	\$8,654,008
Notes payable	393,261
<b>Total current liabilities</b>	<b>9,047,269</b>
Notes payable	21,906,314
Deferred obligations and planned gifts	12,710,179
<b>Total long-term liabilities</b>	<b>34,616,493</b>
<b>TOTAL LIABILITIES</b>	<b>43,663,762</b>
Without donor restrictions:	
Board designated	141,316,917
Undesignated	94,625,968
<b>Total without donor restrictions</b>	<b>235,942,885</b>
With donor restrictions	85,967,349
<b>TOTAL NET ASSETS</b>	<b>321,910,234</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$365,573,996</b>

## STATEMENT OF ACTIVITIES\*

Year ended December 31, 2019

### OPERATING REVENUES

Contributions:	
Individuals	\$81,659,130
Foundations	8,345,535
Corporations	2,109,412
<b>Total operating contributions</b>	<b>92,114,077</b>
Investment withdrawal	8,227,148
Program revenue	214,420
Rental and other income	1,872,044
<b>Total other operating income</b>	<b>10,313,612</b>
<b>TOTAL OPERATING REVENUES</b>	<b>\$102,427,689</b>

### OPERATING EXPENSES

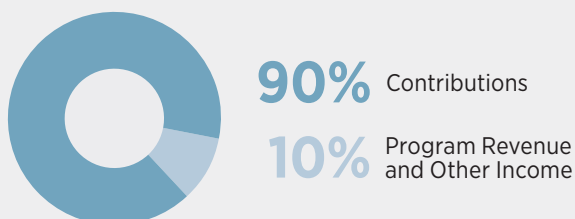
Research	\$23,576,545
Education	26,420,313
Media and government relations	8,093,392
<b>Total program services</b>	<b>58,090,250</b>
Fundraising	13,917,908
Management and general	1,247,220
<b>Total supporting services</b>	<b>15,165,128</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>73,255,378</b>
<b>NET GAIN FROM OPERATIONS</b>	<b>29,172,311</b>

### NON-OPERATING ACTIVITIES

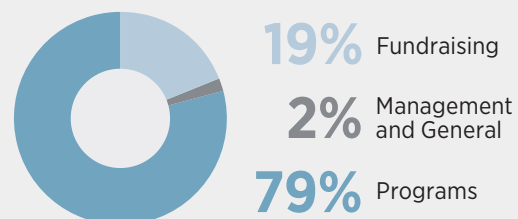
+ Restricted contributions	30,112,917
+ Net investment gain	30,625,760
(-) Depreciation	3,939,499
(-) Interest expense	610,022
(-) Investment withdrawal	8,227,148
(-) Change in restricted net assets	5,849,155
<b>TOTAL NON-OPERATING ACTIVITIES</b>	<b>42,112,853</b>
CHANGE IN NET ASSETS	71,285,164
NET ASSETS—Beginning of year	250,625,070
<b>NET ASSETS—END OF YEAR</b>	<b>\$321,910,234</b>

\*Preliminary results—final audited financial statements will be available on or after July 31, 2020

### 2019 OPERATING REVENUES



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