2017 ANNUAL REPORT
CELEBRATING 40 YEARS OF SERVICE TO CONGRESS AND THE NATION (1977-2017)
VISION STATEMENT

A CONGRESS THAT BETTER SERVES THE PEOPLE.

OUR MISSION

IS TO BUILD TRUST AND EFFECTIVENESS IN CONGRESS. WE DO THIS BY ENHANCING THE PERFORMANCE OF THE INSTITUTION, LEGISLATORS AND THEIR STAFFS THROUGH RESEARCH-BASED EDUCATION AND TRAINING, AND BY STRENGTHENING THE BRIDGE AND UNDERSTANDING BETWEEN CONGRESS AND THE PEOPLE IT SERVES.
The Congressional Management Foundation’s 40th year in service to the Congress and the nation continued a path started by our organization’s founders. A lot has changed since 1977 – early CMF advice was dispensed in paper newsletters “copied” on a mimeograph machine!

Yet many things have not changed: sound management guidance that leads to efficient and effective office operations; leadership principles that inspire and connect employees to their work; and a commitment to providing outstanding and responsive constituent services. Another thing that hasn’t changed: the devotion, professionalism, and patriotism of congressional staff.

This is one of the reasons that in 2017 CMF launched the Democracy Awards. This new program recognizes the congressional office for recognition. Of course, as the leader of the office, the Member deserves a great deal of credit for any success. But we know, and they know, that success would not be realized without a talented and dedicated group of public servants helping them.

“As the Congressional Management Foundation (CMF) is perhaps one of the most impactful organizations you have never heard of. And yet, their relationship with the US Congress may be closer than any other institution in America.”
— Sandra Cyr, Philanthropy Journal

As CMF begins its next decade we wish to thank those staffers, the silent patriots who serve under the dome, who sacrifice so much for the Congress, their constituents, and the nation. Thank you!

BRADFORD FITCH
President & CEO
1,405 congressional staff trained

66 trainings for Congress

8 salaried employees

111 presentations for citizen-advocates

55 citizen groups educated

10,742 citizen-advocates trained
Senator Al Gore (D-TN), 1987
“The Congressional Management Foundation has served as the single best source of advice and input on how a Member of Congress can operate his or her office efficiently and serve the needs of his or her constituents in an effective way. The private sector has supported the Congressional Management Foundation and in doing so, they have benefitted not only the individual Members of the House and Senate, who come up with an office that works, but also the country as a whole because our entire nation needs a legislative branch of government that is effective and efficient and operates smoothly.”

Rep. Lynn Martin (R-IL), 1987
“I’m here as a legislator, but I also have to manage an office. When I don’t do a good job of management, I don’t make good law. There’s one place we can get some help, at the Congressional Management Foundation. They teach us to do a better job at a skill that, frankly, most Members of Congress know too little about. It means better law, it means a better place for you to live, and I think it means a better Congress.”

Joint Statement of The Honorable Steny Hoyer (D-MD) and The Honorable John Boehner (R-OH), Congressional Record, February 28, 2008
“CMF has had a widespread and positive impact on this institution, and we are proud to applaud its efforts over the decades ... Thanks in part to CMF, Congress has a more professionalized workforce with better morale and performance. And the American people get a better government when our democratic institutions are more efficient and effective.”

The Honorable Dan Mica, Chair, CMF Board of Directors, 2011
“As both a Chief of Staff and a Member of Congress, CMF was an invaluable resource to me.”
House Chief of Staff

“Even after 25 years as Chief of Staff, I still refer to CMF for insight as to what the trends are on Capitol Hill. With so much having changed during this time, it is comforting to know that there is an organization like CMF that has its finger of the pulse of what is happening.”

Rep. Daniel Webster (R-FL), 2013

“I read Setting Course before I officially launched my congressional campaign and utilized its time-tested tips as I set up my first office in Washington. When you first arrive in D.C., advice is plentiful, both solicited and unsolicited, but you can’t fake experience and CMF has it.”

Senate Chief of Staff

“Having served as a Chief of Staff in both the House and Senate, I cannot stress enough the critical void that CMF fills in assisting offices with both their strategic and day to day management challenges. CMF really understands the congressional workplace, and they have been an invaluable resource for me on everything from designing mail systems, to planning retreats, helping evaluate staff performance, and providing training for staff members.”

Senate Chief of Staff

“CMF staff have experience in Capitol Hill offices: They know the problems first-hand, they know how the offices work and, at the same time, they bring an outside perspective to those problems to help solve them.”

The Honorable Harry Reid (D-NV),
Congressional Record, September 10, 2012

“CMF has helped Senators significantly improve their online operations, resulting in more transparency and accountability in government. Because of CMF’s research and guidance in Web sites and online communications, Americans have a better understanding of the Congress and better access to necessary services.”
HIGHLIGHTS FROM OUR 40 YEARS
(1977-2017) OF SERVICE TO THE CONGRESS AND THE NATION

1977  CMF is founded as a nonpartisan nonprofit organization by Tom Bedell, a congressional staffer and son of a Member of Congress, and Len Hirsch, an organizational development consultant, to help Members address management challenges in their offices.

1978  Publishes The Intern Owner’s Manual to quickly orient the thousands of interns who support congressional offices every year.

1978-1983  Conducts periodic analyses of House job descriptions and salaries, the results delivered as briefs to House Administrative Assistants (i.e., Chiefs of Staff).

1979  Begins presenting training programs and professional development seminars for congressional managers on timely topics such as staffing, time management, and constituent mail operations.

1980s  Offers in-depth mail and management reviews for offices who request more comprehensive assistance.

1984  The first edition of CMF’s signature publication on setting up and managing a congressional office, Setting Course, is published in conjunction with American University’s Center for Congressional and Presidential Studies and is funded by Deborah Szekely.

1986  Reprints The Intern Owner’s Manual as the Congressional Intern Handbook, which is then revised and published in four additional editions over the next two decades.
1987

1989  Publishes the first edition of *Frontline Management: A Guide for Congressional District & State Offices*, the only comprehensive guidebook on district/state operations.

1990s  Develops the CMF strategic planning retreat model and begins providing one- to three-day planning sessions for individual House and Senate offices, which greatly expands the number of Members using its management services and adopting planning techniques and methods.

1990  Offers its first day-long orientation for the designated aides of House Members-elect, focusing its training on the critical transition time between November and January.

1990  Expands the scope of its salary research to include race and gender data on House and Senate employees. Over the next decade, produces employment studies on a regular schedule that include average salaries and profiles of the common job positions in personal offices.

1993  On behalf of the Joint Committee on the Organization of Congress, conducts the first employee opinion study of congressional staff to elicit their views on the reform of the Congress and their impressions of Congress as a workplace. More than 1,400 DC and district/state staff participate.

1994-1995  Conducts follow-up research with congressional staff on the results of the employee opinion survey and publishes the report, *Working in Congress: The Staff Perspective*. Executive Director Rick Shapiro testifies before the House Appropriations Legislative Branch Subcommittee on how the House could better economize its resources and more effectively meet the needs of House offices.

1996  Conducts an orientation program for new Senate Chiefs of Staff and the designated aides of Senators-elect, in partnership with the Secretary of the Senate.
1999 Publishes “Building Websites Constituents Will Use,” the first comprehensive look at Congress’ online communications practices.

2000 Under contract with the House, develops a pilot program for Staff Assistant Orientation. Through a competitive bid, this program is expanded to Intern Orientation and Writing Effective Constituent Correspondence courses in later years.

2001-2003 Partners with The George Washington University on the “Congress Online Project,” a two-year program funded by The Pew Charitable Trusts to examine and improve the use of websites and other online communications by congressional offices. This research leads to the Gold Mouse Awards.

2001 Publishes “E-mail Overload in Congress: Managing a Communications Crisis,” an issue brief that details how email has heightened tensions and public disgruntlement with Congress, and provides congressional offices with a blueprint for changing their communications practices.

2005 Surveys and interviews 300+ House and Senate staffers on constituent communications. The resulting report, How Capitol Hill Is Coping With the Surge in Citizen Advocacy, documents the exponential rise in incoming constituent messages and kicks off the “Communicating with Congress” project.

2006 In partnership with Gartner Consulting, completes a multi-year contract that results in a 10-year information technology roadmap for the House of Representatives. At its conclusion, Kathy Goldschmidt of CMF testifies before the Committee on House Administration.

2006-2009 Along with its academic research partners from the Harvard Kennedy School, the University of California–Riverside, and The Ohio State University, conducts the “Connecting to Congress” project through a grant from the National Science Foundation’s Digital Governance program.
**2007** Through a grant from the Pew Foundation, hosts a retreat for Senate Chiefs of Staff in Philadelphia, which focuses on enhancing bipartisanship in the Senate, and on improving leadership and management skills.

**2007-2011** After conducting extensive research with congressional staff, grassroots advocacy groups, and vendors, develops recommendations for all stakeholders and suggests improvements to the structure and processes for managing congressional communications.

**2008** Revises its mission statement to include its expanded role in enhancing citizen engagement by educating advocates on how to best communicate with Congress.

**2009** Under contract with the House, develops pilot webinars for entry-level district office staff. Through a competitive bid, these webinars are expanded to several additional topics for district/state staff.

**2009** Publishes *Online Town Hall Meetings: Exploring Democracy in the 21st Century*, which finds that personal interaction with a Member of Congress, even online, increases constituents’ approval of and trust in their Member.

**2010** Updates and revises the third edition of *Frontline Management*, incorporating new data from District and State Directors, renaming the guidebook to *Keeping It Local*.

**2010** Launches the *Partnership for a More Perfect Union*, an initiative dedicated to improving the relationship and communications between citizens and Members of Congress.

**2011-2013** In partnership with the Society for Human Resource Management, launches the "Life in Congress" project to improve Congress as a workplace. Survey data from 1,400+ personal office staff and 25 House Members is published in three reports.

**2016** Partners with the Government Affairs Institute at Georgetown University to offer "Legislative Operations for Congressional Staff," an intensive, two-day training program that focuses exclusively on how to be an effective legislative correspondent, legislative assistant, or legislative director.

**2017** Continue to the following page for more highlights!
In August 2017 CMF launched a new "Office Toolkit" on our website and conducted webinars for congressional staffers to introduce it. More than 25% of House offices participated in a training session.

The Office Toolkit, based on research from the Congress 3.0 project, provides guidance for better managing constituent correspondence, conducting telephone town hall meetings, and collecting feedback from constituents about their satisfaction with the office’s customer service.

For each of these topics, we provide an overview of why improvement is vital and our recommendations for changes. Each module also includes:

- Steps to implement enhancement
- Research on why the enhancements work
- Videos of congressional staff describing how each experiment worked in their offices
- Links to helpful content to help staff get buy-in from colleagues and managers

CMF will continue to add modules to the Office Toolkit, focusing on additional ways that House and Senate offices can improve their operations and communications.

Congress 3.0 was a two-year project (2015-2017), funded by the Democracy Fund to conduct research on ways to modernize congressional office operations and constituent engagement.
Improving Constituents’ Views of Telephone Town Hall Meetings

Telephone town hall meetings are one of the most significant technological advances implemented by the Congress in the past two decades. However, until now little research or guidance was available to help congressional offices make the most of these communications tools.

As part of the Congress 3.0 research project, CMF tested out novel methods designed to improve constituents’ satisfaction with telephone town halls. Through this research, we learned that these interactions helped bolster constituents’ general approval and trust of their Member of Congress.

| Thinking about the Representative, in your opinion, how well do each of the following words describe him? |
|---|---|---|---|---|
| Understands People Like Me | 45% | 67% |
| Accessible | 55% | 79% |
| Knowledgeable | 69% | 92% |

Before | After
Congress is Struggling to Perform Its Integral Role in American Democracy

“Americans widely believe that Congress is not working because it does not want to work. Conventional wisdom holds that the blame for any democratic dysfunction lies primarily with current occupants of Capitol Hill. CMF offers an alternative perspective. Congress may not be working well because it does not currently have the capacity to work well.”

A ground-breaking CMF report, “State of the Congress: Staff Perspectives on Institutional Capacity in the House and Senate,” reveals that senior congressional staff have deep concerns about important aspects of congressional operations and performance. CMF adapted several benchmarks for democratic legislatures from work being done internationally and used them to assess the U.S. Congress. The report focuses primarily on the resource and operational challenges congressional staff have been facing over the past few decades and provides a context for them.

It offers new insight into the roots of current congressional dysfunction and paths toward pragmatic reforms to strengthen Congress and American democracy.

This research is part of CMF’s Resilient Democracy Coalition, a program funded by a grant from Democracy Fund and performed in collaboration with Voice of the People (VOP), the Edward M. Kennedy Institute for the United States Senate (EMKI), and Lorelei Kelly of the Beeck Center for Social Impact and Innovation at Georgetown University.
CMF’s Kathy Goldschmidt speaks at Reboot Congress 2017, an event focused on modernizing the Congress, hosted by Lincoln Network in partnership with Democracy Fund. Photo courtesy of Lincoln Network, used with permission.

**SENIOR CONGRESSIONAL STAFF’S LEVEL OF SATISFACTION WITH BENCHMARKS RELATING TO INSTITUTIONAL CAPACITY AND LEGISLATIVE PERFORMANCE**

“In your opinion, how important are the following for the effective functioning of your chamber?” and “How satisfied are you with your chamber’s performance in the following?”

<table>
<thead>
<tr>
<th></th>
<th>Very Important</th>
<th>Very Satisfied</th>
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<tr>
<td>Members have adequate time and resources to understand, consider and deliberate policy and legislation</td>
<td>83%</td>
<td>15%</td>
</tr>
<tr>
<td>Members and staff have access to high-quality, nonpartisan, policy expertise within the legislative branch</td>
<td>81%</td>
<td>24%</td>
</tr>
<tr>
<td>Staff knowledge, skills and abilities are adequate to support Members’ official duties</td>
<td>67%</td>
<td>6%</td>
</tr>
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*(n=128-130)*

Recognizing Non-Legislative Achievement and Performance in Congress through First-Ever Democracy Awards

"Congress is broken. Congress doesn’t work." These beliefs are so embedded in our society that it seems that most Americans have lost hope in an institution that seems ineffective, unresponsive, and unable to address the challenges America faces. But what if citizens got a glimpse of a different Congress?

In this spirit CMF launched a distinctive honors program — the Democracy Awards — to recognize non-legislative achievement and performance by Members of Congress and their staff.

The goals of the program are to:

- Recognize and applaud legislators and staff who truly deserve acknowledgment for their best practices in the service of the Congress.
- Provide examples for congressional colleagues to emulate, thereby enhancing the entire institution.
- Enhance and improve public understanding and trust in Congress — if only a tiny bit, demonstrating that Congress can work.

Winners and finalists will be recognized at an awards ceremony on Capitol Hill on July 13, 2018.

CMF thanks our Founding Partner, Bridge Alliance, for their generosity in providing a grant to launch this initiative. We also thank our Platinum Sponsors for their support: CMS Energy, CQ, National Write Your Congressman, Society for Human Resource Management, and the Szekely Family Foundation.
After the new Members of the 115th Congress were sworn-in, CMF engaged in a six-month effort to prepare these first-term offices for maximum effectiveness and performance.

We partnered with the Committee on House Administration, the House Chiefs of Staff Association, and the Legislative Assistants Association to hold multiple training programs, luncheons, and networking events for the staff in new Member offices. Our goals were to provide targeted job training, assistance in implementing effective operations, and problem-solving for common freshman office “headaches.”

CONGRESSIONAL IMPACT STORY: CONNECTING STAFF

During a CMF webinar for caseworkers in 2012, one of the participants had the idea to start a nonpartisan caseworker assistance distribution list. By the end of 2017, more than 650 House staffers were on the listserv, which serves as an information-sharing and problem-solving forum for these staff that are located throughout the country.

CMF’s Susie Gorden discusses “What I Wish I’d Known as a New LA” at an orientation program for new Legislative Assistants on Capitol Hill.
Training 50,000 Citizen-Advocates and Counting!

Since 2014 more than 50,000 Americans have participated in CMF citizen engagement training through the organizations that are members of CMF's Partnership for a More Perfect Union.

In 2017, CMF set an organizational record by conducting more than 111 advocacy training programs (in-person speeches, webinars, and enhanced advocacy training) involving 10,742 citizen-advocates. The vast majority of these Americans participated in advocacy training due to their affiliation with organizations in CMF’s Partnership for a More Perfect Union. Since its inception in 2010, 123 nonprofits, associations, and companies have participated in the Partnership.
At Peak of Citizen Activism, Detailing the Most Effective Means of Contacting Congress

"Citizen-Centric Advocacy: The Untapped Power of Constituent Engagement," reveals the degree of influence that citizens have on congressional decision-making. The research answers critical questions for citizen-advocates and lobbyists, including the following:

- How influential are constituent meetings compared to lobbyist meetings?
- What is the most effective way to communicate with a lawmaker (letter, email, phone call)?
- Which methods/strategies are most successful for building long-term relationships with Congress?

The findings are based on nine surveys of congressional staff, comprising nearly 1,200 responses provided to CMF from 2004-2015. The report was sponsored by the American Society of Association Executives (ASAE) and Broadnet.

![Bar chart showing influence of advocacy strategies](chart.png)
Helping Regular Citizens Become Extraordinary Advocates

Through a grant from Feeding America, the largest network of food banks in the United States, CMF designed an “advanced advocacy academy,” which first launched in 2015, and has been repeated in 2016 and 2017. In 2017, CMF also delivered an advocacy academy for the National Association of Realtors. This resulted in a combined 50-person participation in ~40 hours of in-person and online training, interactive exercises, homework assignments, targeted coaching, and role-playing over the course of four months. After an academy concludes, participants conduct advocacy meetings on Capitol Hill.

Through before-and-after surveys, both the food bank and Realtor participants self-reported positive changes in their behavior and attitudes.

"In the past when I have met with legislators, I have felt fairly confident, but after the final [advocacy academy] training, I felt incredibly confident. I knew the exact flow of my meeting, and felt prepared for whatever questions came my way."

– Kimberly LoVano, Greater Cleveland Food Bank
Congressional decisions affect food banks around the U.S. in a variety of ways – tax laws, incentives to give to charities, and federal programs to alleviate hunger. Among those programs that help feed needy citizens is the Supplemental Nutrition Assistance Program (SNAP – formerly known as Food Stamps). The operation of SNAP directly affects operators of food banks: if SNAP benefits are cut back then people need to rely more on private charities, including food banks.

In 2015 the House of Representatives was considering a budget that Feeding America determined would cut the SNAP program, putting further pressure on their member organizations. A senior manager for a food bank decided to put some of her advocacy academy training to the test. She knew her Member of the House, but had rarely “pressured” him on votes. Prior to the budget vote, the food bank employee put out a simple message on Twitter to her followers: contact our Representative and let him know this budget vote affects families in his district.

A few hours later the food bank’s phone rang. A staffer from the Member’s office, whom the employee knew, was not too pleased by this “pressure.” The senior manager explained the situation, and had subsequent conversations with other staff members. Some months later another budget vote was approaching in the House. This time the congressional office reached out to the senior manager before the vote. The senior manager was seen as a valued expert on hunger issues. In this case, the food bank went from being “on” the table in Washington, to “at” the table … with one tweet.
Strengthening Advocacy Skills through Citizen Boot Camps

In 2017, CMF launched a new service, advocacy boot camps, for organizations looking for one- or two-day intense workshops about building relationships and communicating effectively with elected officials. Boot camps are customized to the organization’s needs and include between 4-10 hours of training, and can include in-person presentations, webinars, and/or videos. In separate programs, CMF trained a combined 65 supporters of the Environmental Defense Fund and the National Federation of Independent Business in this program’s inaugural year.
Help CMF Continue Our Work

It's no secret that many Americans think Congress is ineffective and broken. Yet rather than turn its back on the greatest legislative body ever created, the Congressional Management Foundation embraces it.

We are a unique organization that is needed now more than ever. Ensuring that the public, and Congress itself, understands best practices for democracy is vital.

As a 501(c)(3) nonpartisan nonprofit, CMF relies on the generosity of corporations, associations, foundations and individuals to support its activities. Please show your support by making a contribution. Donors at all levels are welcome and contributions are tax-deductible to the fullest extent of the law.

“CMF is the only source of hands-on training that is available to Chiefs of Staff to really learn how to run a congressional office. Their training programs and services are invaluable.”

- House Chief of Staff
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President & CEO

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Chair

THE HONORABLE KELLY D. JOHNSTON
Vice Chair

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Research and Communications Associate (hired 2018)

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Director of Citizen Engagement

BRADLEY JOSEPH SINKAUS
Research and Communications Associate (hired 2018)

JAIME WERNER
Manager of External Relations

CMF tries to not only “talk the talk” but “walk the walk” when it comes to management, so we often apply best practices to ourselves. In that spirit we happily agreed when our Manager of External Relations, Jaime Werner, volunteered to raise a service-dog-in-training through Canine Companions for Independence. For 14 months Jumbo served not only as a morale booster in our office, but as a natural icebreaker and training assistant at CMF events. While we were sad to see our valuable and friendly colleague leave in late 2017, we can happily report Jumbo is about to complete his advanced training and will soon be aiding a person in need.
THANK YOU TO OUR SUPPORTERS

340B Health
AARP
Academy of Nutrition and Dietetics
Agronomy, Crop and Soil Science Societies
Alzheimer’s Association
American Academy of Dermatology
American Academy of Family Physicians
American Academy of Ophthalmology
American Academy of Orthopaedic Surgeons
American Academy of Physicin Assistants
American Congress of Obstetricians and Gynecologists
American Farm Bureau Federation
American Health Care Association
American Heart Association
American Hospital Association
American Institute of CPAs
American International Automobile Dealers Association
American Library Association
American Medical Association
American Organization of Nurse Executives
American Physical Therapy Association
American Psychological Association
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American Society of Civil Engineers
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CMS Energy Company
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Columbia Books & Information Services
Congressional Federal Credit Union
Congressional Hispanic Caucus Institute, Inc.
CQ Roll Call
Credit Union National Association
Dan Mica
Democracy Fund
Emergency Nurses Association
Environmental Defense Fund
Executive Coaching & Consulting Associates
Feeding America
Forum for Youth Investment
General Mills, Inc.
Goodwill Industries International, Inc.
GoRail
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HCA Healthcare
Institute of Scrap Recycling Industries, Inc.
Ira Chaleff
KnowWho
L2
Leidos
Leukemia and Lymphoma Society
MENTOR: The National Mentoring Partnership
National Apartment Association
National Association of Chain Drug Stores
National Association of Convenience Stores
National Association of Counties
National Association of Elementary School Principals
National Association of Insurance and Financial Advisors
National Association of Realtors
National Association of Workforce Development Professionals
National Beer Wholesalers Association
National Council for Behavioral Health
National Council of Independent Business
National Hospice and Palliative Care Organization
National Multiple Sclerosis Society
National Potato Council
National PTA
National Rural Electric Cooperative Association
National Rural Letter Carriers’ Association
National School Boards Association
National Write Your Congressman
NCTA - The Internet & Television Association
New York Life Insurance Company
Northwestern Mutual Life Insurance
Patricia McGinnis
Physician Assistant Education Association
Polsinelli
Quorum
Robert Wood Johnson Foundation
Share Our Strength
Shoutpoint
Society for Healthcare Epidemiology of America
Society for Human Resource Management
Southwest Airlines Company
State Farm
Susan G. Komen for the Cure
The ALS Association
The Fertilizer Institute
The Michael J. Fox Foundation for Parkinson’s Research
The Nature Conservancy
The Szekely Family Foundation
The William and Flora Hewlett Foundation
The Wine Institute
Toyota
U.S. Chamber of Commerce
U.S. House of Representatives
United Technologies Corporation
UPS Corporate Public Affairs
Volunteers of America
VoterVoice
Women in Government Relations
World Wildlife Fund
YMCA of the USA
### Revenues and Expenditures (2013-2017)

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### Fundraising by Sector 2017

- **Foundations**: 28%
- **Association**: 27%
- **Corporate**: 12%
- **Nonprofit**: 12%
- **Government**: 21%