



CONGRESSIONAL
MANAGEMENT
FOUNDATION

2018 ANNUAL REPORT

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.

MESSAGE FROM THE PRESIDENT & CEO

CMF's 2018 was filled with many accomplishments. *Our Partnership for a More Perfect Union* trained more than 13,000 citizen-advocates. Freshman offices received additional help with our new *Job Description for a Member of Congress*. However, the most important achievement of the year was the launch of the Democracy Awards.

The goal of the Democracy Awards is to recognize legislators and their staffs, identifying best practices and offering roadmaps to improve operations and services to constituents. We also hope the Democracy Awards will shine a light on those dedicated public servants working in Congress. While the Member likely gets most of the credit, Democracy Awards actually go to the office. That's because we all know that while the Member is the crucial leader, he or she cannot succeed without the support of an outstanding team of staff.



"This designation exemplifies some of the best congressional talent in our representative democracy. Each of these individuals has made and upheld a significant commitment as a public servant to do what is best for their constituents."
- CMF President & CEO Bradford Fitch

And at the 2018 Democracy Awards Ceremony it was congressional staff who were the stars! Staff who won the office and the Lifetime Achievement awards stood for a moment in the spotlight and got an overdue bit of applause. CMF is proud to recognize their outstanding public service and praise these silent patriots serving under the dome.

BRADFORD FITCH
President & CEO

"I particularly want to thank the Congressional Management Foundation because you're putting a light on what I think a lot of us feel sometimes doesn't get, quite frankly, recognition. People don't necessarily recognize what stressful jobs our staffers have."

- Rep. Susan Davis, 2018 winner for "Life in Congress" Workplace Environment

"We know we got to have good people who will collaborate, good people who, by the way, see these issues as bipartisan ... One of the reasons we have that bipartisan lodestar is because of the Congressional Management Foundation."

- Sen. Ron Wyden, 2018 winner for Innovation

CMF IMPACT: 2018 AT A GLANCE

13,700+
citizen-advocates
trained



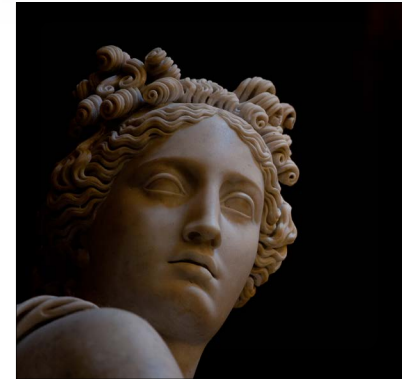
104
presentations for
citizen-advocates

66
citizen groups
educated



1,100+
congressional
staff trained

24
trainings for
Congress



8
salaried
employees

10
consultants
and trainers



41
years serving
Congress and the
nation

IMPROVING CONGRESS AS A WORKPLACE

CMF conducts professional development training for all levels of congressional staff on office operations and management. These interactive sessions provide bipartisan “safe havens” where congressional staff come together to engage in problem-solving. In 2018, CMF trained more than 1100 congressional staff through 24 in-person programs, speeches, and webinars.

Who are these congressional staff?

Employees attending our programs were in managerial positions, legislative and policy positions, constituent services, and administrative/support positions.

Common titles for these positions include: Chiefs of Staff, Legislative Directors, Administrative Directors, Deputy Chiefs of Staff, Schedulers, District/State Directors, Caseworkers, and Field Representatives.

“I’ve been on the Hill for almost 15 years and this was the most helpful CMF event I’ve attended, and among the most helpful training efforts. Really solid tips.”

– House committee staffer

What did CMF teach them?

- Improving Staff Performance
- Creating a Positive Office Culture
- Enhancing Workplace Flexibility in Congress
- Preparing for Your Next Job
- Improving Your Hiring Process
- The Hidden Qualities that Make Us Influential
- Financial Planning
- The Gatekeepers: Lessons Hill Managers Can Learn from White House Chiefs of Staff
- Working with Federal Agencies
- Taming Your Personal Email Monster
- Strategic Scheduling
- Orienting Interns and Fellows

Why is this needed?

First, while congressional jobs are highly sought after, the turnover is high, due to the demanding work environment and growing public disdain for government. The result is an ever-shifting workforce in which years of experience and highly specialized skill sets walk out the door every day, forcing Members to constantly rehire and retrain staff.

Second, as advisors to Members of Congress, staff tend to be well-versed in public policy and political strategy but often have less experience in effective office operations. Unlike the private sector, professional development opportunities are not commonplace or integrated into the culture of Congress. The lack of focus on best management practices leads to inefficiencies and precious time taken away from legislating and serving citizens.

What does this accomplish?

By enhancing the effectiveness of congressional office operations, CMF enables Members and staff to provide better services for their constituents and create better policy outcomes for all Americans.

41%

House Legislative Assistants who have been in their jobs for less than one year

IMPROVING THE DEMOCRATIC DIALOGUE

In modern democracy, millions of Americans exercise their Constitutional right to contact Congress through grassroots advocacy. Through CMF's *Partnership for a More Perfect Union*, the only private, subscriber-only research and training program, we seek to improve the relationship and communications between citizens and Congress. In 2018, CMF trained more than 13,700 citizen-advocates through 102 speeches, webinars, and videos.

Who are these citizen-advocates?

The citizen-advocates who receive our training represent a cross-section of constituents across America, ranging from anti-hunger advocates to REALTORS, retirees and small business owners, educators to various health care professionals.



CMF's Seth Turner speaks to grassroots advocates on research-proven tactics for effectively communicating with Congress. Photo credit: © Garth Weithman/Courtesy of United Way Worldwide

What did CMF teach them?

- Before, During, and After Meetings with Members of Congress
- What Congress' Policy Advisers Want in Briefing Materials
- How Congress is Using Social Media to Interact with Constituents
- Backstage Pass: How Lawmakers Make Decisions
- How to Create Events Back Home with Legislators
- Writing Messages That Matter
- Fly-Ins: Catch Them in DC and Back at Home
- Advanced Advocacy Strategies
- Building Relationships with a New Congress

@NoSeniorHungry: Outstanding advocacy session led by **@congressfdn** President Brad Fitch at the #MealsOnWheels Conference...“best session ever!” #UnityofPurpose18

Why is this needed?

Congress is being flooded with mass email campaigns from citizens, yet this is one of the least effective methods of communications when it comes to influencing Members and Senators. CMF's training and materials are based on research with congressional staff on which advocacy strategies and tactics are most effective and influential – what can really make a difference on public policy.

What does this accomplish?

CMF educates and motivates individuals to become active and informed citizen-advocates, providing them with an understanding of how Congress *really* works, the skills to influence public policy, and the value of citizen engagement.

RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



Honoring High-Performing Congressional Offices That *Provide Excellent Constituent Service*

The Congressional Management Foundation Democracy Awards is the first program to recognize congressional offices' performance in service to the nation and their constituents. Our inaugural 2018 awards honored eight winners and 12 finalists across four office categories. [Watch the 2018 Democracy Awards ceremony that was broadcast on C-SPAN](#)

“Each of these Democracy Award winners and their staff model the public service we hope to see among every Member of Congress as they restore trust and faith that our democratic institutions can work.”

– CMF President & CEO Bradford Fitch



@JohnBoozman: Humbled & honored my office has earned @congressfdn's Democracy Award for Constituent Service. Since coming to Congress my goal has been to use the power of this office for good. Providing consistent, high-quality constituent service is one way we do that.

Senator John Boozman (R-AR), 2018 winner for Constituent Service



Representative Raúl Grijalva (D-AZ), 2018 winner for Constituent Service

RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



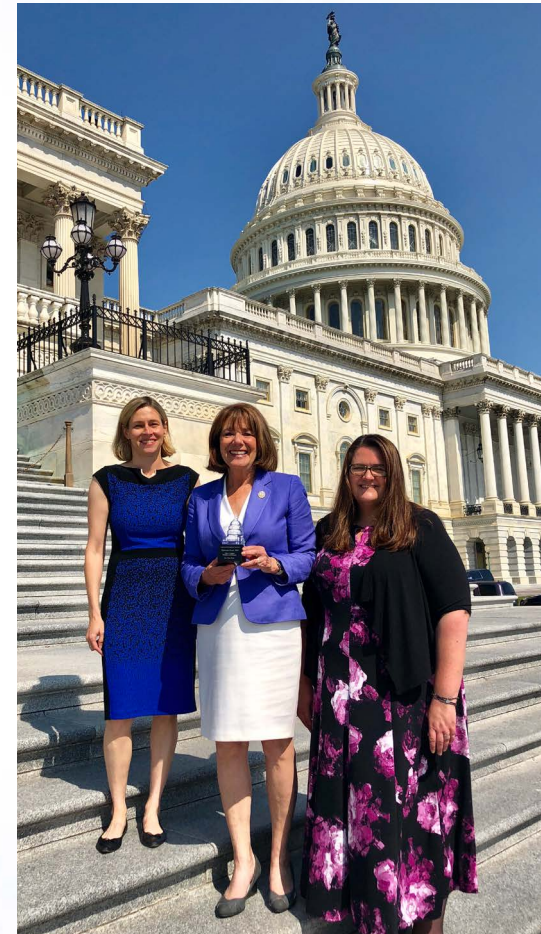
Honoring High-Performing Congressional Offices That *Cultivate a Productive and Positive Work Environment*



Representative Dave Reichert (R-WA), 2018 winner for “Life in Congress” Workplace Environment

@RepSusanDavis: Constituent service is the most rewarding part of our job & we take great pride in making the fed gov work for the taxpayers. I’m honored and thank CMF for their efforts to raise awareness about the work Congress does to serve the public. #DemocracyAwards

Representative Susan Davis (D-CA), 2018 winner for “Life in Congress” Workplace Environment, on the steps of the U.S. Capitol with Chief of Staff Lisa Sherman (left) and District Director Jessica Reed (right)



RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



Honoring High-Performing Congressional Offices That *Promote Transparency & Accountability*



Representative Seth Moulton (D-MA), 2018 winner for Transparency and Accountability

“We’re blessed to be there serving the great folks of Virginia, we learn a lot from our colleagues and their great work. It is about service above self ... putting constituents first in everything you do.”

- Representative Rob Wittman (R-VA)



Representative Rob Wittman (R-VA), 2018 winner for Transparency and Accountability

RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



Honoring High-Performing Congressional Offices That *Foster Innovation*

@RonWyden: Developing the #RonReport and other new ways to use the First Amendment to promote communication with the people I'm honored to serve has been a privilege. Big thanks to @congressfdn for the Innovation Award.



Senator Ron Wyden (D-OR), 2018 winner for Innovation



Representative Cathy McMorris Rodgers (R-WA),
2018 winner for Innovation

RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



Honoring Members of Congress Who Have *Positively Impacted the Institution*

In addition to the office awards, CMF honored two Members and one congressional staffer (along with four staff finalists) with Democracy Awards for Lifetime Achievement. Each of these honorees has served in the Congress for at least 20 years and has had positive impacts on the management and operations of the institution.

Senator Rob Portman (R-OH)

“The Senator really wanted to be here today ... he appreciates this honor but feels like he’s just trying to do his job for the people of Ohio. He believes he was elected to deliver results for his constituents, and to help people achieve their full potential, and that means working with people, regardless of party, to get things done. So that’s what he’s doing today in Ohio, and what he’ll continue doing in his role in the Senate.”

– Emily Benavides, Sen. Rob Portman (R-OH)

Representative Steny Hoyer (D-MD)

“On behalf of Mr. Hoyer, I want to thank the Congressional Management Foundation for your tireless efforts at improving the institution of Congress. It always bothers Mr. Hoyer that Congress is held in such low regard by the public, it bothers him that Congress hasn’t been functioning well lately, to put it mildly. The Congressional Management Foundation is one of the few groups dedicated to fixing that in a pragmatic and nonpartisan way. I’ve seen

them in action – regularly training new staff on the intricacies of Congress, fixing large, intractable problems like the Communicating with Congress API, successfully pushing Congress to improve their websites through the Gold Mouse Awards, taking a leading role in Mr. Hoyer’s Congressional Hackathons, and recognizing innovation and excellence through these new Democracy Awards.”

– Steve Dwyer, Rep. Steny Hoyer (D-MD)

RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



Honoring Staff Who Have *Positively Impacted the Institution*



Lifetime Achievement winner Judy Schneider.

“I could not be in prouder company, I could not be more humbled, I could not be more embarrassed, and I can’t thank you all enough. And I have to go back to work.”

– Judy Schneider

Judy Schneider

Specialist on the Congress,
Congressional Research Service (CRS)

Called a “legend” by Women in Government Relations (WGR), Judy Schneider is a pioneer in congressional studies with 42 years of Capitol Hill experience. She has educated hundreds of Members of Congress and their staff on the rules of Congress, co-wrote the comprehensive *Congressional Deskbook*, and published scores of CRS reports.

She has been recognized with numerous accolades and in 2015, WGR created the Judy Schneider Fellowship in recognition of her decades of service mentoring thousands of women through her “Direct Connect to Congress” series.

CMF is honored to present Judy Schneider with its first-ever Staff Lifetime Achievement Democracy Award.

Tracee Sutton

Legislative Director, Sen. Heidi Heitkamp (D-ND)

@SenatorHeitkamp: My legislative director, Tracee Sutton, was a finalist for @congressfdn’s Lifetime Achievement Award. She has singlehandedly made flood protection & water infrastructure projects possible across North Dakota for more than two decades. Incredibly proud of her. #DemocracyAwards



Lifetime Achievement finalist Tracee Sutton.

RECOGNIZING THE BEST IN CONGRESS FOR THEIR PUBLIC SERVICE



Honoring Staff Who Have Positively Impacted the Institution

Janet Qureshi

Director of Case Management,
Rep. Kevin Brady (R-TX)

@RepKevinBrady:
Proud doesn't even begin to describe how I feel about my Director of Casework, Janet Qureshi, receiving the Lifetime Achievement Award from @congressfdn. Janet has a heart of gold and I would not be where I am today without her.

Chuck Kleeschulte

Senior Professional Member, Senate
Energy and Natural Resources Committee

@lisamurkowski:
Chuck Kleeschulte, a longtime member of my staff who recently retired, was selected as a Congressional Management Foundation's Lifetime Achievement Award finalist. Proud he's being recognized for his achievements on behalf of Alaska & our nation.
#DemocracyAwards



(left to right) *Lifetime Achievement* finalists Teri Gullo, Chuck Kleeschulte, and Janet Qureshi.

Teri Gullo

Assistant Director for Budget Analysis,
Congressional Budget Office

"I'm very proud that Teri Gullo, CBO's Assistant Director for Budget Analysis, was honored ... Teri has made enormous contributions to CBO's work for the Congress for more than three decades."

- Keith Hall, CBO Director

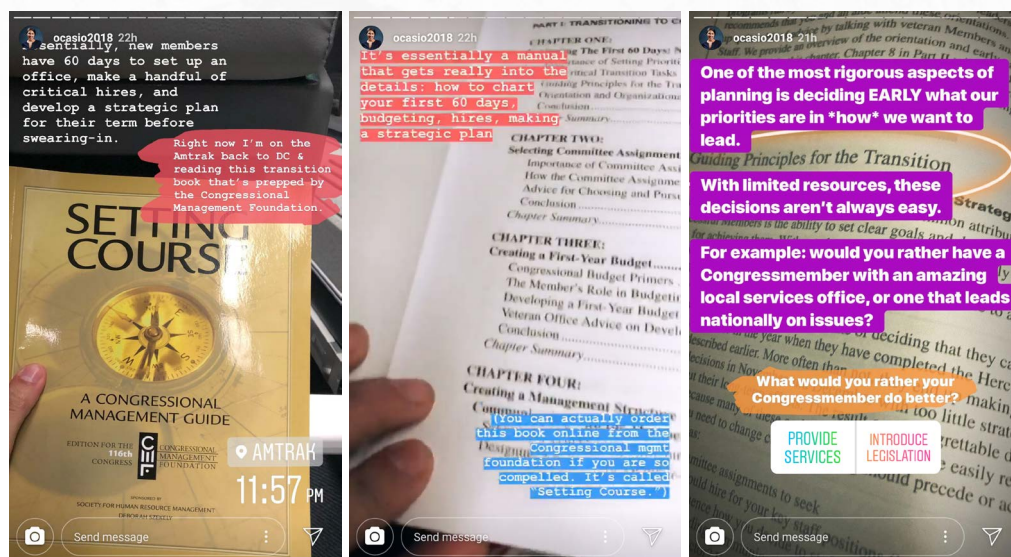
HOW WE ARE HELPING CONGRESS

Resources provided to New Members by CMF

- **Setting Course: A Congressional Management Guide.** CMF's 300-page, signature guidebook on setting up and running a congressional office.
- **"90-Day Roadmap to Setting Up a Congressional Office."** A pocket-sized version of CMF materials that includes task lists related to budgeting, technology, and hiring.
- **Training for New Aides at the Official House New Member Orientation.** Our guidance and materials (which include specialized worksheets and templates) incorporate expertise from Chiefs of Staff.
- **New Member Training Series.** This training and networking series is offered to freshman offices over their first eight months and covers critical topics for this timeframe.
- See the next page for the new **Job Description for a Member of Congress!**

(Above right) Member-Elect Alexandria Ocasio-Cortez, who has millions of followers on social media, featured CMF's signature publication, *Setting Course*, in an Instagram story during New Member Orientation week.

Helping Newly Elected Members Successfully Transition to Congress



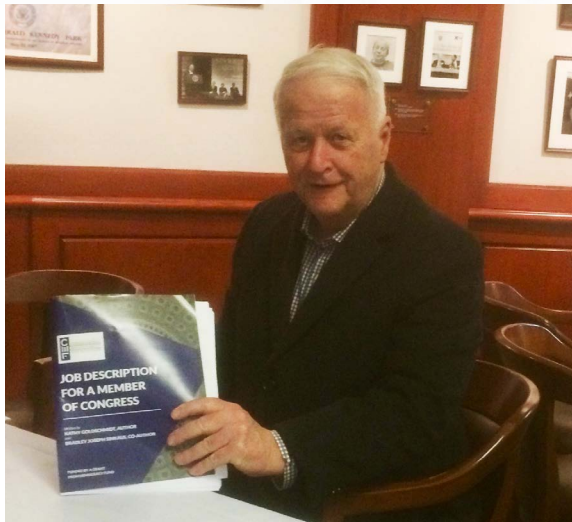
In two months, Members-elect need to be up and running — serving their constituents immediately in January after their swearing-in. The transition time is short and setting up their offices in D.C. and across the country is a daunting task.

Not only must Members hire staff and determine where to locate district/state offices, they must also review their budget allocation, determine how these limited resources should be spent, purchase technology and equipment, learn new

rules and guidelines — all while pursuing committee assignments and attending their own orientation and planning meetings.

In this rush to meet expectations, Freshmen often make management mistakes that take months, if not years, to rectify. To reduce this tendency, CMF provides a combination of publications, training and guidance to prepare these first-term congressional offices for maximum effectiveness and performance as early as possible in their tenures.

HOW WE ARE HELPING CONGRESS



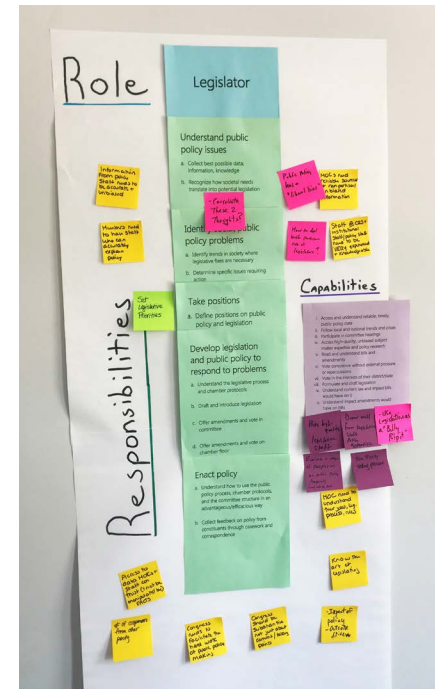
Former Rep. Bill Delahunt (D-MA) holds the *Job Description for a Member of Congress* at the Harvard Kennedy School Bipartisan Program for Newly Elected Members of Congress.

What Exactly Do Members of Congress Do?

“While there are countless sources of information about Congress – how Senators and Representatives vote, how a bill becomes a law, how the performance of a particular Congress can be measured – no document exists that outlines the actual responsibilities of a Member of Congress – until now.”

The *Job Description for a Member of Congress* is the first detailed description of the key responsibilities of a Member of Congress. It outlines the breadth of this position through seven functions:

1. Representation
2. Legislation
3. Investigation/Oversight
4. Management
5. Politics
6. Collaboration
7. Leadership



The “Legislator” role in progress during our “subcommittee of geniuses” workshop.

LEARN MORE: MEMBERS' WORK AND DEVELOPMENT OF THE "JOB DESCRIPTION"

535

Representatives
in the House



6

Non-voting Members
of the House
(5 Delegates and 1
Resident Commissioner)

78%

Members who report
spending more than 40
weekends/year in their
congressional district



220

Aggregate years of
experience the project
team has in working with
and for the Congress

7

Current and former
congressional staff
who contributed to
the "job description"



70

Average hours worked
per week when the
House is in session

59

Average hours worked
per week when the
House is out of session



95%

Rated "Staying in touch
with constituents" as "very
important," making it the
job aspect most critical to
their effectiveness

Sources: *Job Description for a Member of Congress*, Congressional Management Foundation, 2018;
Life in Congress: The Member Perspective, a Joint Research Report by CMF-SHRM, 2013.

HOW WE ARE HELPING CITIZENS



Anti-hunger advocates practice for their Capitol Hill meetings with congressional staff.

“I would attend this every year, knowing I would learn more and feel more comfortable as time goes on.”

– Participant in the 2018 NFIB “Advocacy Boot Camp”

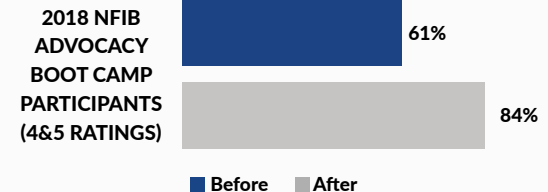
Helping Regular Citizens Become Extraordinary Advocates

Advocacy organizations commonly invest tens of thousands of dollars on their advocacy fly-in events, yet do not adequately train their citizen-advocates – the very people who can tell a Member of Congress how a bill or issue affects key constituents!

However, for the 66 organizations who are members of CMF’s *Partnership for a More Perfect Union*, we trained more than 13,700 citizens in 2018 through presentations, speeches, and videos.

Additionally, CMF has created advanced advocacy programs in which cohorts of citizens are provided with more in-depth training through a customized combination of ~40 hours of in-person and online instruction, interactive exercises, homework assignments, targeted coaching, and role-playing with current congressional staff.

On a scale of 1-5 (with 1 being “very uncomfortable” and 5 being “very comfortable”), how comfortable are you with your ability to hold a meeting with a Member of Congress or their staff person about NFIB’s legislative priorities?



In 2018, CMF conducted advanced courses for Catholic Relief Services, Environmental Defense Fund, Feeding America, and the National Federation of Independent Business (NFIB). Through before-and-after surveys, participants self-reported positive changes in their behavior and attitudes.

Donate



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

Top to bottom: David Nevins (left) of Bridge Alliance, Founding Partner of the CMF Democracy Awards, speaks to Dan Glickman, former Representative and Secretary of Agriculture, at the 2018 awards ceremony. Margo Vickers of the Society for Human Resource Management presents a Democracy Award in the category of “Life in Congress” Workplace Environment to Rep. Susan Davis. Laricke Blanchard (left) and Steve Larkin (center), members of CMF’s Board of Directors, greet Brad Fitch at the 2018 Democracy Awards ceremony.

CMF STAFF & BOARD



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In the Fall of 2018, CMF hosted Eyad Al-Olaimat (pictured above, right with Brad Sinkaus, left) through the Leaders for Democracy Fellowship Program. Eyad runs Entikhabate, a mobile platform in Jordan and India that aims to enhance citizens' involvement in political life by raising their level of awareness. As part of his fellowship, Eyad provided CMF with assistance on a grant from Democracy Fund, offering a unique international perspective on the intersection of technology, communications, and governance.

(Staff listing as of May 2019)

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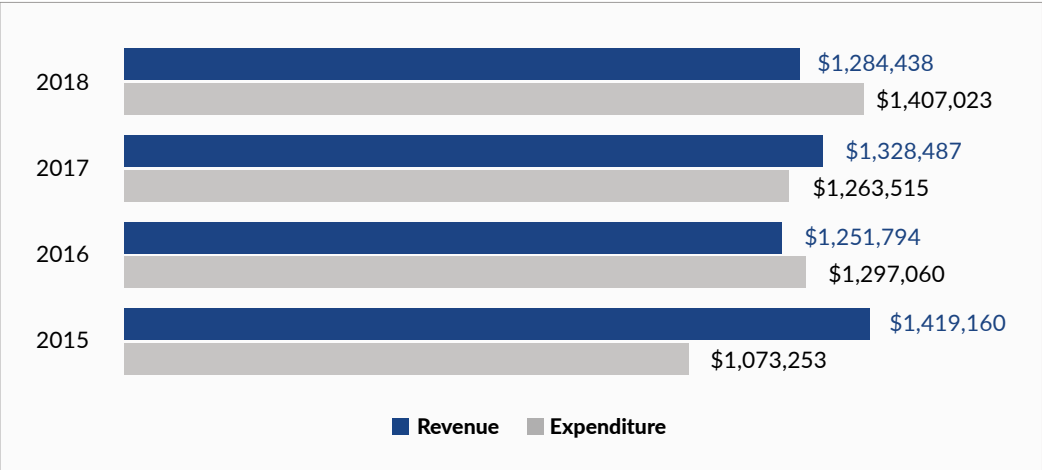
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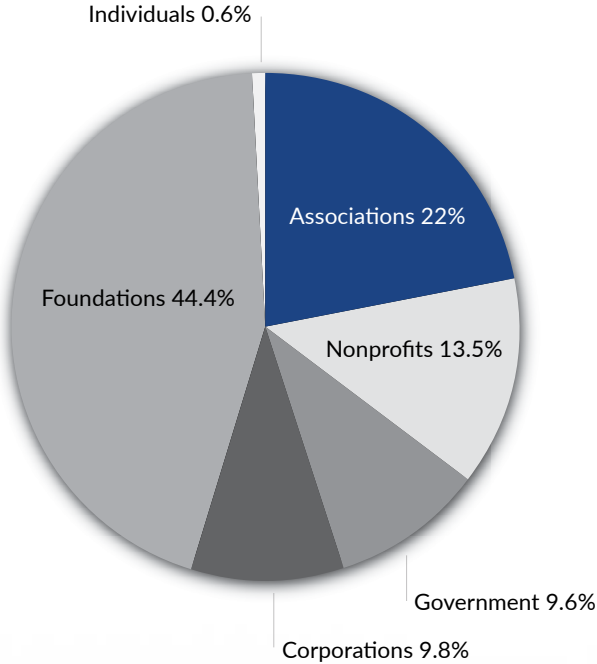
THANK YOU TO OUR SUPPORTERS

AARP	American Library Association	Community Services Group	Independent Community Bankers of America (ICBA)	National Federation of Independent Business (NFIB)	School Nutrition Association
Academy of Nutrition and Dietetics	American Medical Association	Congressional Black Caucus Foundation	Institute of Scrap Recycling Industries, Inc.	National Hospice and Palliative Care Organization (NHPCO)	Senator Herbert Kohl
Agronomy, Crop and Soil Science Societies	American Organization of Nurse Executives	Congressional Federal Credit Union	International Paper	National Multiple Sclerosis Society	Share Our Strength
Altria Group Distribution Company	American Physical Society	Congressional Hispanic Caucus Institute, Inc.	Kelly Johnston	National Parks Conservation Association (NPCA)	Society for Healthcare Epidemiology of America
Alzheimer's Association	American Physical Therapy Association	Consumer Technology Association	Leidos	National PTA	Society for Human Resource Management (SHRM)
American Academy of Dermatology	American Society of Civil Engineers (ASCE)	Council for Opportunity in Education	Meals on Wheels America	National Rural Electric Cooperative Association (NRECA)	Southwest Airlines Company
American Academy of Family Physicians	American Society of Clinical Oncology	CQ Roll Call	MENTOR: The National Mentoring Partnership	National Rural Letter Carriers' Association (NRLCA)	Stand Up Republic
American Academy of Ophthalmology	American Trucking Associations	Credit Union National Association (CUNA)	National Apartment Association	National School Boards Association	State Farm
American Academy of Orthopaedic Surgeons (AAOS)	Annie E. Casey Foundation	Dan Mica	National Association of Chain Drug Stores	National Write Your Congressman	Steptoe & Johnson
American Academy of PAs	Association for Accessible Medicines	Democracy Fund	National Association of Convenience Stores (NACS)	Navigators Global	Susan G. Komen for the Cure
American Association of Nurse Anesthetists (AANA)	Association for Advanced Life Underwriting	Edison Electric Institute	National Association of Counties	NCTA - The Internet & Television Association	Texas Library Association
American College of Cardiology	Association of Schools and Programs of Public Health	Environmental Defense Fund	National Association of Criminal Defense Lawyers (NACDL)	New Jersey State Library	The Fertilizer Institute
American College of Surgeons	Atlanta Community Food Bank	Ernst & Young	National Association of Elementary School Principals	New York Life Insurance Company	The Michael J. Fox Foundation
American Farm Bureau Federation	BAYADA Home Health Care	Feeding America	National Association of Independent Colleges and Universities	Northwestern Mutual Life Insurance	The Nature Conservancy
American Gas Association	Bloomberg Government	Financial Services Institute (FSI)	National Association of Insurance and Financial Advisors (NAIFA)	Patricia McGinnis	The Szekely Family Foundation
American Health Care Association	Blue Cross Blue Shield Association	Fireside21	National Association of Realtors	Physician Assistant Education Association	The William and Flora Hewlett Foundation
American Heart Association	Bridge Alliance	Forum for Youth Investment	National Council for Behavioral Health	Quorum	United States Chamber of Commerce
American Hospital Association	Catholic Relief Services	Friends Committee on National Legislation		Rebuilding Alliance	United Way Worldwide
American International Automobile Dealers Association (AIADA)	Citizens' Climate Lobby	GoRail		Robert Wood Johnson Foundation	UPS Corporate Public Affairs
	CMS Energy Company	Grant Thornton			Virginia Credit Union League
	College of American Pathologists	HCA Healthcare			Volunteers of America

Revenues and Expenditures (2015-2018)



Fundraising by Sector 2018





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