2019 Annual Report

Building Trust & Effectiveness in Congress

Selected Highlights from Our Year in Service to Democracy
Our Vision & Mission

VISION STATEMENT

A Congress that better serves the People.

MISSION STATEMENT

The Congressional Management Foundation (CMF) is a 501(c)(3) nonpartisan nonprofit whose 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.
Management is boring. CMF often hears that process doesn’t matter. **2019 was one of those rare moments when management was supremely relevant.** For insiders like CMF, the launch of the Select Committee on the Modernization of Congress gave us a venue to share ideas that had been percolating for years – and many of those ideas became part of H.Res.756, the Modernization Committee’s recommendations to improve the Congress.

Yet, as I write this in 2020, the U.S. is in the grips of a pandemic. **We are getting a daily lesson in the immeasurable value of public servants, and the tragedy when they fail us.** Congress has showed us that management isn’t about boring process stuff – it’s about getting results, for their constituents and the nation.

**With this renewed focus in America on the importance of government serving the basic needs of its citizens, CMF stands ready to continue this mission.** And we will demonstrate in 2020 that improving Congress culminates in a better democracy, which genuinely and materially preserves and expands “Life, Liberty, and the Pursuit of Happiness.”

**Bradford Fitch**
President & CEO
Congressional Operations

IMPROVING CONGRESS AS A WORKPLACE

CMF works directly with Members of Congress and staff to enhance their operations and interactions with constituents.

Our services, adapted to the unique congressional environment, include:

• Management books and guidance
• Customized consulting services
• Training and professional development

Instructor Tracy Carmen-Jones trains congressional staff about emotional intelligence and leadership.

Chief of Staff Rhonda Foxx and Legislative Director Scott Rausch provide guidance to freshman staff.
Modernize the Congress.

The establishment of the House Select Committee on the Modernization of Congress was an historic development and an extraordinary opportunity for congressional improvement.

CMF’s involvement continues a long thread of collaborating with Congress on large-scale institutional reform efforts. Our contributions are informed by our decades of training, consulting, and conducting original research with congressional staff and our expertise in office operations and workplace issues.
THREE SETS OF BIPARTISAN, UNANIMOUS RECOMMENDATIONS

CMF's contributions focused on human resources issues, such as staffing and workplace environment (compensation, benefits, retention, diversity, staff limits), internal office operations (Member budgets), and improving the transition of Members-elect to Congress.

"CMF is proud to support the Select Committee in its efforts to modernize Congress, and we urge House leadership, institutional offices, and relevant committees to implement these proposals. We recognize that change inherently causes some level of discomfort, yet adopting these ideas will result in a Congress which works better for the American people."
"From my 20 years around here, CMF's always been the standard for staff development and training."

— Rep. Rob Woodall (R-GA), July 2019 hearing of the Select Committee on the Modernization of Congress

"Thank you so much for *Setting Course* and all the materials you have given us. Getting us set up and on the right track is such a service to the whole American public."

— Director of Community Affairs for Freshman House Member

"Bradford is AMAZING! Practical, clearly presented, stories incorporated – love it!"

— Congressional manager at House training program on strategic planning
In our second annual program, Members of Congress and their staff were honored for their best practices in the service of their constituents and the nation. The Democracy Awards program also enhances and improves public understanding and trust in Congress by demonstrating that Congress can work.
CONSTITUENT SERVICE
Sen. Marco Rubio (R-FL)*
Rep. Mike Kelly (R-PA)
Rep. Susan A. Davis (D-CA)
Rep. Ro Khanna (D-CA)*

"LIFE IN CONGRESS" WORKPLACE ENVIRONMENT
Sen. Mike Crapo (R-ID)*
Rep. Cathy McMorris Rodgers (R-WA)
Rep. Darren Soto (D-FL)
Rep. Salud Carbajal (D-CA)*

TRANSPARENCY, ACCOUNTABILITY, AND INNOVATION
Sen. Steve Daines (R-MT)*
Rep. Jim Banks (R-IN)
Rep. Mark DeSaulnier (D-CA)*
Rep. Tom O’Halleran (D-AZ)

MEMBER LIFETIME ACHIEVEMENT
Sen. John McCain (R-AZ)*
Rep. John Dingell (D-MI)*

STAFF LIFETIME ACHIEVEMENT
Rena Diamond
Constituent Service Representative
Rep. Hakeem Jeffries (D-NY)

Jim Grant
Mail Manager
Sen. Mike Crapo (R-ID)

The Honorable Karen Haas
former Clerk of the U.S. House of Representatives

Susan Olson
Deputy Chief of Staff and General Counsel
Sen. John Boozman (R-AR)

Reynold Schweickhardt*
Director of Technology Policy
U.S. House of Representatives

Franz Wuerfmannsdobler
former Deputy Chief of Staff
Sen. Chris Coons (D-DE)

*denotes winners
"We are here to serve and not to be served. From my days in the private sector, I learned that the most important person is the customer. Our constituents are our customers."

— Senator Steve Daines (R-MT)

"It truly is an honor to be here today to accept this award on behalf of him and my family. It was important to my grandfather that we continue his legacy of working across the aisle. He wrote and spoke about it right until the end, and the work that you do here at the Congressional Management Foundation helps offices on the Hill walk that same path."

— Caroline McCain, granddaughter of Sen. John McCain, Democracy Award Lifetime Achievement Honoree
CMF's Partnership for a More Perfect Union is dedicated to enhancing citizen engagement and improving communication between citizens and Congress.

Based on our research with House and Senate staff, we provide guidance to constituents and advocacy groups on how to best communicate with Capitol Hill, giving them a stronger voice in policy outcomes and greater trust in their democratic institutions.
100 trainings for 63 associations and nonprofits

10,000+ Americans trained in 2019

Congress approves:

Visitors Who Were "Very Prepared" for Capitol Hill Meetings

- 97% CMF Trainees
- 12% Typical Advocate
The Partnership in Action

A Closer Look at How CMF Improves Fly-In Events and Citizen Advocacy with One of Our Partners: MENTOR: The National Mentoring Partnership

Top: Seth Turner teaches youth mentoring advocates and leaders how to tell a personal story and improve their meetings with Members of Congress, based on CMF's research with congressional staff. Mentors then worked on improving their personal stories and practiced their talking points before heading to Capitol Hill.

Bottom: Rep. Greg Stanton tweets about the Arizona mentors who visited his office that day.
EXCLUSIVE RESEARCH THAT PRODUCES ADVOCACY RESULTS

CMF conducted research with congressional staff which shows that grassroots tactics such as sending form emails are less effective than emails from people who represent many constituents (e.g., organization leaders, elected officials, business owners, etc.).

<table>
<thead>
<tr>
<th>Form Emails</th>
<th>Constituent Leader Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer: About 100 (52%)</td>
<td>Answer: Less than 10 (55%)</td>
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</table>

Deacon Don Weigel Jr., Diocesan Director for Catholic Relief Services in the Archdiocese of Buffalo, NY, provides feedback after participating in advocacy training conducted by CMF. [Watch >]
"I have never learned more about advocacy and effective communication methods than I did during those two hours with CMF."

— Bryan Tanner, United Way of St. Joseph County

"Today’s citizen advocate webinar was such a great program! All of CMF’s training is so good."

— Claire Hammer, Registered Dietitian Nutritionist (RDN) and Certified Diabetes Educator (CDE), member of the Academy of Nutrition and Dietetics

“What a great day of learning about advocacy at #TxA19 I came away with a lot of hope and things to think about! The training from @congressfdn was great!”

— Lana Lozure, @lanabrarian, 2019 Texas Library Association Annual Conference
"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

We Need Your Help to Continue This Work.

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. 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.

"CRS is so grateful for the partnership with CMF and for your organization’s work—it helps us better do our mission and we are very grateful also for how it helps contribute to our democracy."

— Catholic Relief Services
Thank You To Our Supporters.

AARP
Academy of Nutrition and Dietetics
Aflac Federal Relations
Agronomy, Crop and Soil Science Societies
Altaria Group Distribution Company
Alzheimer's Association
American Academy of Dermatology
American Academy of Ophthalmology
American Academy of Orthopaedic Surgeons (AAOS)
American Academy of PAs
American Association of Law Libraries
American Association of Nurse Anesthetists (AANA)
American College of Emergency Physicians
American College of Preventive Medicine
American College of Surgeons
American Gas Association
American Health Care Association
American Heart Association
American Hospital Association
American International Automobile Dealers Association (AIADA)
American Library Association
American Medical Association
American Organization for Nursing Leadership
American Physical Society
American Psychological Association
American Society of Civil Engineers (ASCE)
American Veterinary Medical Association
Association of American Medical Colleges
BAYADA Home Health Care
Becker & Poliakoff
Beekeeper Group
Bridge Alliance
California Association of Realtors
Catholic Relief Services
Chief Administrative Officer (CAO)
CMS Energy Company
College of American Pathologists
Congressional Federal Credit Union
Congressional Hispanic Caucus Institute, Inc.
Council for Opportunity in Education
Credit Union National Association (CUNA)
Dan Mica
DC Association of Realtors
Edison Electric Institute
Emergency Nurses Association
Environmental Defense Fund
Executive Coaching & Consulting Associates
Feeding America
Financial Services Institute (FSI)
Forum for Youth Investment
Friends Committee on National Legislation
Government Affairs Institute at Georgetown University
Grant Thornton
Habitat for Humanity International
HCA Healthcare
Hearth, Patio & Barbecue Association
Household and Commercial Products Association (HCPA)
Independent Community Bankers of America (ICBA)
Institute of Scrap Recycling Industries, Inc.
ITC Transmission
MENTOR: The National Mentoring Partnership
Michael J Fox Foundation
National Apartment Association
National Association of Chain Drug Stores
National Association of Counties
National Association of Development Organizations (NADO)
National Association of Insurance and Financial Advisors (NAIFA)
National Association of Manufacturers
National Association of REALTORS
National Council for Behavioral Health
National Federation of Independent Business (NFIB)
National Hospice and Palliative Care Organization (NHPCO)
National PACE Association
National Retail Federation
National Rural Letter Carriers' Association (NRLCA)
National School Boards Association
National Write Your Congressman
Navigators Global
NCTA - The Internet & Television Association
New York Life Insurance Company
Northwestern Mutual Life Insurance
Patricia McGinnis
PG&E Corporation
Robert Wood Johnson Foundation
Rural Community Assistance Partnership
SCG Legal
Society for Healthcare Epidemiology of America
Society for Human Resource Management (SHRM)
Southwest Airlines Company
Stephen Larkin
Susan G. Komen for the Cure
The Aluminum Association
United Way Worldwide
Welcoming America
# Financials

## REVENUES AND EXPENDITURES (2016-2019)

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<tr>
<th>Year</th>
<th>Revenues</th>
<th>Expenditures</th>
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<tbody>
<tr>
<td>2019</td>
<td>$1,557,723</td>
<td>$1,436,768</td>
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<tr>
<td>2018</td>
<td>$1,284,438</td>
<td>$1,407,023</td>
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<tr>
<td>2017</td>
<td>$1,328,487</td>
<td>$1,263,515</td>
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<tr>
<td>2016</td>
<td>$1,251,794</td>
<td>$1,297,060</td>
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## FUNDRAISING BY SECTOR 2019

- **Corporations**: 9.3%
- **Foundations**: 33.2%
- **Government**: 12.3%
- **Individuals**: 0.2%
- **Nonprofits**: 15.9%
- **Associations**: 29.2%

*Total Fundraising: $1,557,723*
As part of the “Leaders for Democracy” Fellowship Program, CMF was proud to welcome Chafic Daoud to our team for seven weeks. From Lebanon, Chafic is a community activist, business developer, and entrepreneur. While at CMF, Chafic provided assistance on the Member-Constituent Engagement (MCE) project, for which he reviewed advocacy platforms and engaged with advocacy professionals to collect guidance on how advocacy groups could improve their knowledge management practices.

Left: Chafic Daoud (center) with research assistant Harrison Kane (left) and Seth Turner (right).
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Mr. Gary Serota
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