History of The Heartland Institute

By Joseph Bast
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The Heartland Institute is in its 32nd year of operation. Over its history it has saved taxpayers billions of dollars, helped free hundreds of thousand of students from failing and dangerous public schools, and led to the repeal or prevented the expansion of countless unnecessary and costly regulations saving consumers billions of dollars more.

From modest beginnings with a single part-time staff member and an annual budget of only $20,000, Heartland has grown to become one of the largest free-market think tanks in the United States with 36 full-time staff and an annual budget of approximately $6 million. Operating from its own building in Arlington Heights, a suburb of Chicago, it has some 270 policy advisors in all 50 states and reaches more national and state elected officials, more often, than any other think tank.

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The following history of The Heartland Institute was originally written for Heartland's board of directors in 2013 as part of a new five-year plan for the organization, so it describes as objectively as possible how the organization has changed over the years. It lists some achievements and victories, but it also includes challenges and disappointments and describes how the organization changed in response to them.

This history necessarily leaves out the names and contributions of many people who served on the organization's board of directors, as staff or as authors, advisors, and donors. The organization was genuinely blessed by the generosity, hard work, and guidance of extraordinary people. Their omission from this brief history in no way is meant to minimize or overlook their contributions.

Founding and Early Years (1984–1989)

The Heartland Institute was founded in April 1984. The formal mission statement that appeared in its first publications was to "solicit, edit, and promote free-market research and commentary on public policy issues specific to Illinois and Chicago."

Scott Hodge, Jim Johnston, and Dave Padden had drafted and were circulating a plan to create an organization modeled after the Reason Foundation in California to be called the "Midwest Research Center." Hodge soon left Chicago to attend college, but he would later return to work for Heartland and is now president of the Tax Foundation in Washington, DC. Johnston became a board member and remains an active director. Padden served as chairman of the board for ten

years and as a director until his death in 2011.

Padden tapped Joseph Bast to be the organization's first employee and executive director. Bast was in his senior year at the University of Chicago and, with his wife Diane, was coeditor and copublisher of *Nomos: Studies in Spontaneous Order*, a libertarian magazine. After ten years Bast joined the Board of Directors and was named president and CEO. He still holds those titles today.

David H. Padden, Founder and Chairman of the Board

The goal of The Heartland Institute was to act as a bridge between the academy – especially the University of Chicago – and state and local elected officials in Illinois. We largely imitated the programs of three existing organizations: The Heritage Foundation, Cato Institute, and Blaney Institute. The first two are well-known national organizations based in Washington, DC; the third was the first-ever state-based free-market think tank. Based in Wisconsin, it closed a few years after Heartland was launched.

Outputs were primarily policy studies, op-eds, small events, and occasionally books. The vision was not to expand outside the state or to increase the staff to more than four or five full-time people. Heartland had many successes during this period, including partial deregulation of taxicabs in Chicago, preventing subsidies to Chicago's baseball and football franchises, helping write the first privatization agenda for Chicago, and helping to set a legislative agenda for Illinois Gov. Jim Edgar's first term. Our ideas helped sustain a small conservative/libertarian movement in Illinois despite extensive corruption and incompetence by the state's Democrats and Republicans.

During this time we also helped start and led the Madison Group, a national association of state-based free-market think tanks, and produced its newsletter and hosted events. The Madison Group eventually became State Policy Network, with Heartland President Joseph Bast serving as a founding director and secretary.

After three or four years, we became very good at "soliciting, editing, and promoting" research and commentary, something we still do extremely well. But we couldn't help but notice that we were only infrequently changing public policy. Most of our publications weren't being read or acted on by elected officials in Springfield. Our opposition to corporate subsidies and higher taxes caused corporate donors and even leading conservative philanthropists in Illinois to cut us off. (They were loyal first to the Republican governors who supplied a steady stream of pork and pinstripe patronage.) Illinois' political culture was (and remains) corrupt and most of its leaders have no interest in ideas. They viewed our efforts as irrelevant or a minor irritant at best.

There were things we could have done differently to be a more effective state-based think tank given the environment in which we found ourselves. We could have moderated our libertarian

principles, moved to Springfield where the legislative action was, or gotten involved in politics by recruiting, training, and supporting candidates for public office.

But Heartland's leadership had little interest in being a moderate conservative Illinois think tank. The founders and directors were devout libertarians who didn't want to compromise principles for effectiveness. They wanted to see their ideas actually change the world and not just appear on the op-ed pages of newspapers.

If Illinois wasn't ready for reform, Heartland's leaders concluded, then maybe The Heartland Institute should turn its attention to states that were.

Franchise Period (1989–1995)

Rather than reconcile ourselves to being a small player in a corrupt state, we looked for and found opportunities in other states. This "swimming in a bigger pond" looked to us as more fulfilling – for staff as well as directors and donors – than going through the motions of fostering debate in a corrupt state.

In 1987 we were asked by Franklin Buchta, a small business owner in Milwaukee and member of Heartland's Board of Directors, to open an office in Milwaukee. We did so and discovered such an office could be efficiently run by centralizing in Chicago various support services such as editing, printing, mailing, and bookkeeping. Such offices enabled us to raise funds from principled potential donors throughout the Midwest.

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Starting in 1989, we followed the success in Milwaukee by opening offices in Detroit, Columbus, Kansas City, and St. Louis. We split "Heartland Illinois" from the national Heartland office and for a while it had separate office spaces and staff. We created detailed operations manuals for the heads of each office and "franchise" agreements based on agreements used by for-profit franchise businesses, and we trained new staff in a variety of systems. One important source of management theory during this time was *The E-Myth,* a book by Michael Gerber.

We operated those offices until about 1994, with the last one, in Detroit, closing in 1995. This was our "franchise period" when the long-term goals were to open offices in other states, provide them with high-quality support services, and maximize their output measured as the number of policy studies and books, number of media hits and circulation, number of events hosted and attendance, and number of donors and funds raised.

The franchise period was a programmatic success by these metrics. We produced a steady stream of policy studies, books, op-eds, videos, and events. We would plan promotional campaigns for the authors of policy studies that would take them from Milwaukee to Chicago, Detroit,

Columbus, St. Louis, and Kansas City over the course of a week, resulting in newspaper and radio coverage in each city plus exposure to hundreds of business and civic leaders.

The allure of being an "out-of-state expert" gave us more credibility than our libertarian ideas otherwise would have had. The quality of our work – written by leading academics, edited by Joseph and Diane Bast, and professionally designed and printed – put us a level or two above indigenous state-based think tanks and local business groups.

During this period we also got involved in two major national policy debates for the first time, giving us reason to believe we could participate in national as well as state public policy debates. First Lady Hillary Clinton was overseeing a plan to revamp and centrally control the nation's health care system. We produced a book titled *Why We Spend Too Much on Health Care* that was twice delivered to every member of Congress by allies and the basis for a series of white papers used by Republican staff to conduct a "Health Care University" for members of Congress. The *Wall Street Journal* turned to Heartland's Joseph Bast to pen an op-ed on the day the Clinton health care plan was finally introduced as legislation. That essay, titled "Clinton Health Care Plan: Dead on Arrival," helped persuade Republican officials to unify in opposition to the plan and eventually defeat it.

National foundations that might have financed a promising scheme turned us down, saying we were too different from the traditional more academically leaning think tank model.

Also in 1994 we published *Eco-Sanity: A Common-Sense Guide to Environmentalism* by Joseph Bast, Peter J. Hill, and Richard C. Rue. It marked Heartland's entrance into the national and international debate over environmental protection. Chapters of the book presaged Heartland policy studies, books, and other educational efforts on air and water pollution, global warming, resource depletion, and other topics that remain a focus of our work to this day.

By 1994, problems with the franchise model became apparent. None of the heads of the franchise offices proved to be competent fundraisers and various experiments with hiring people from different backgrounds and compensation agreements designed to motivate them to fundraise failed. National foundations that might have financed a promising scheme turned us down, saying we were too different from the traditional more academically leaning think tank model. New indigenous state-based think tanks were being formed around the country at that time, and we started getting requests not to compete with those local efforts.

Our focus on marketing, not just originating, ideas was ahead of its time. So too was our focus on activities at the state level and the synergy that is achieved when multiple state-based groups cooperate. Today, many think tanks and advocacy groups pride themselves on doing what we were doing two decades ago.

A Public Policy Revolution (1995–2007)

In 1995, we concluded the franchise model was not sustainable. Total Quality Management (TQM) was a popular management philosophy at the time and was being used with success by some members of Heartland's board of directors. It contradicted some of the ideas set forth in *The E-Myth* and led to a re-thinking of the organization's culture. Technology was changing the ways think tanks could conduct their work and communicate with audiences. Recognizing these trends and opportunities, Joseph Bast produced a long-term plan titled "A Public Policy Revolution" that fundamentally changed Heartland in a number of ways.

By interviewing legislators we learned that newspapers, not policy studies or books, were the best way to get their attention. They wanted a clearinghouse for the work of free-market groups, rather than an organization that promoted only its own research. Donors told us they wanted evidence that we were actually changing public policy, not just writing and talking about it. Media increasingly indicated they did not share our free-market philosophy and would largely ignore our work, no matter its quality.

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After conducting an "environmental scan" of the think tank world, we decided there was a niche to be filled by a national free-market organization that focused on reaching all of the country's 7,300 state legislators. Rather than create offices in every state, we would shut down the "affiliate" offices, consolidate operations in Chicago, and use new communications technology to give legislators "what they need, when they need it."

The result was a transformation of Heartland from a regional think tank to a national one. Our primary audience became state elected officials, not media. Our primary products became pubic policy newspapers and *PolicyFax*, a fax-on-demand information service. The primary measures of success became how many elected officials actually read and used our research and whether this led to changing public policy.

We started by launching *School Reform News*, the world's first monthly public policy newspaper. Each issue contained approximately 20 articles – news and commentary – describing what states were doing to improve K-12 education. At first we worried there wouldn't be enough going on to justify a newspaper, but within a few months we discovered the problem, to the extent there was one, was that there was *too much* happening to fit in 20 pages. A large and untapped market for this sort of publication existed.. We received more positive feedback from the first issue of *School Reform News* than from all the policy studies we had published up to that time.

School Reform News was eventually followed by five more monthly newspapers: *Budget & Tax News, Environment & Climate News, Health Care News, InfoTech & Telecom News, and FIRE Policy News.* Today, all but *InfoTech & Telecom News* are still in production. A telephone poll

of randomly selected state and local legislators conducted in 2011 found nearly 80 percent of state legislators and 66 percent of local elected officials reported reading at least one of these publications.

We also created *PolicyFax.* From any touch-tone phone, legislators could call the *PolicyFax* phone number, enter their password and the identification number of a document they wished to receive, and the document would be automatically sent to their fax machine. “Research and commentary at your fingertips” was one of the slogans we used to market it. Virtually all the other free-market groups agreed to allow their publications to be posted on *PolicyFax* and marketed to elected officials, and we produced and distributed catalogues describing the documents available through the service.

Surveys showed legislators loved the new public policy newspapers and came to rely on them for ideas. *PolicyFax* generated and fulfilled thousands of requests per month for research.

Our decision to treat legislators as customers, not enemies, and to make our editorial output resemble newspaper writing rather than academic analysis and opinion commentary meant we would be fundamentally different from the Cato Institute, Heritage Foundation, and other think tanks we previously used as models. It required changing the composition of Heartland’s staff and even its board of directors. But legislators and donors responded positively to this transformation, especially corporate donors who saw the potential for getting third-party support for items on their legislative agenda that aligned with our free-market convictions.

The new model produced exceptional results. Surveys showed legislators loved the new public policy newspapers and came to rely on them for ideas. *PolicyFax* generated and fulfilled thousands of requests per month for research. When the Internet appeared on the scene, we transitioned from *PolicyFax* to *PolicyBot* and quickly became a leading site for legislators as well as a larger audience of college students and allies.

We also expanded the circulation of our public policy newspapers to audiences beyond the core audience of state elected officials to include teachers, school principals, insurance brokers, environmental professionals, and many other groups. Our outreach to these other audiences waxed and waned based on funding earmarked for this kind of outreach, but we grew convinced that a publication that could get the attention of a busy elected official also would work as an effective outreach publication to other audiences.

Between 1998 and 2007 we became well-known nationwide for our opposition to sports stadium subsidies and municipal broadband schemes, and for video franchise reform. All three issues were major controversies at the state level and were issues neglected by the national groups in Washington, DC. We produced a series of policy studies on the first two topics and held an important national conference on the third, bringing together legislators from across the country to share ideas and strategies. Our work in these areas saved consumers billions of dollars in

taxes, fees, and cable bills.

During this period we also started a partnership with Lee H. Walker and the New Coalition for Economic and Social Change, a think-tank devoted to black conservative thinkers. In 2002 we invited Lee to co-locate in Heartland's offices, and in 2006 Heartland and the New Coalition cosponsored a major conference on the legacy of Booker T. Washington. Later, we published two books by Lee, *Book T. Washington: A Re-Examination,* (2008) and *Rediscovering Black Conservatism* (2009).

As we grew in size and influence, we began to notice how different we were becoming from the "beltway" think tanks we once tried to imitate. We were treating elected officials as customers rather than opponents and increasingly looking past mainstream media as a measure of our success and directly to state legislators who used our work to change public policies. We were also developing a culture of humility – we were quick to admit that we didn't always have the best answers or publications.

We believed our good work was scaleable, that with additional funding we could reach more elected officials and have an even greater impact on public policy. We decided it was time to ramp up the size of the organization.

The Ramp-Up (2007–2012)

In 2007, with a pledge of financial support from an anonymous donor, Joseph Bast produced a plan to enable Heartland to "ramp up" its staff size and programs over the course of three years. A detailed business plan was created that envisioned hiring ten new staff including an executive vice president and department heads for government relations, publications, communications, editorial, and development (fundraising). The theory was that, after three years, the increased staff levels would be self-sustaining thanks to recruitment of new major donors and the expansion of the development department.

The gifts were made and the infusion of new staff had several effects on Heartland's programs. We reviewed our commitment to TQM and decided it was worth continuing, even though other management theories and techniques had emerged in the years since we embraced it. A new board member showed us how TQM was being used at his company with great results and we brought some new techniques to bear on Heartland's processes.

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We started tracking inputs and outcomes for the government relations and communications teams more closely and achieved major increases in productivity by both. In 2011 the government relations team exceeded one million contacts with elected officials for the first time

in a single year. Every day, Heartland's legislative specialists were on the phone talking to legislators about new research and new ideas for solving problems, offering to provide expert witnesses to testify.

The communications department made similar strides, dramatically increasing the number of news releases, op-eds, letters to the editor, and feature stories submitted to mainstream media and resulting in press coverage. Heartland's Web presence was greatly expanded with the creation of new sites on environment, education, and health care. We started using social media to drive traffic to our sites and to push-market our ideas to a vastly expanded audience.

Fighting Global Warming Alarmism

Simultaneously with the Ramp-Up Plan but extending for two more years, a donor significantly increased giving for projects on the topic of climate change. Our unique insight was that free-market groups at the time were avoiding the science debate, even though the case for cutting man-made emissions of greenhouse gases was weak. We saw a need to provide a platform for scientists who were skeptical of the global warming claims of environmental groups

Environment & Climate News is the leading outreach publication for the free-market environmentalism movement and a natural platform from which to launch a more high-profile campaign for sound science and economics in the debate over global warming.

Since publication of *Eco-Sanity: A Common-Sense Guide to Environmentalism* in 1994, Heartland has been a leading voice for free-market environmentalism (FME). *Environment & Climate News* is the leading outreach publication for the movement and a natural platform from which to launch a more high-profile campaign for sound science and economics in the debate over global warming. The campaign made use of every tool at our disposal:

- **Authoritative Books:** Recognizing the hefty reports of the United Nations' Intergovernmental Panel on Climate Change (IPCC) were often cited as presenting the "consensus" of the scientific community, we partnered with the Nongovernmental International Panel on Climate Change (NIPCC) to produce and widely circulate two massive volumes in a series titled *Climate Change Reconsidered*.

- **Popular Books:** We produced new revised editions of two key books that present the skeptics position on climate change – *Unstoppable Global Warming – Every 1,500 Years*, by Dennis Avery and S. Fred Singer, and *Energy Keepers – Energy Killers* by Roy Innes – and distributed more than 200,000 copies.

- **Events:** Heartland organized and hosted eight International Conferences on Climate Change, events that took place in New York, Chicago, Sydney, Australia, and Munich, Germany. The first event featured 100 speakers from a dozen countries and was attended by 550 scientists.

All together, more than 3,500 people have attended one of these conferences, creating an international community of skeptics.

- **Policy Studies:** We produced a half-dozen *Heartland Policy Studies* that examined the cost of higher energy taxes and "cap and trade" schemes, the impact of such laws on farmers, the abuse of science in the debate, and the misuse of graphs and visual illustrations by alarmists.

- **Videos:** We were the main U.S. distributor of *The Great Global Warming Swindle*, the best documentary film that answers (and demolishes) Al Gore's *An Inconvenient Truth*. We purchased and distributed thousands of free copies (including 2,000 packaged side-by-side with Gore's film). We also have distributed more than 500,000 copies of *Unstoppable Solar Cycles*, a 10-minute video produced by The Idea Channel.

- **Public Policy Newspaper:** Since the mainstream media have almost blacked out coverage of science and economics that contradicts Al Gore's alarmism, we used *Environment & Climate News.* Thanks to this steady, monthly drum-beat of sound science, elected officials in the U.S. are far better informed on the global warming issue than are the general public or environmental activists.

- **Advertising:** We ran more than $1 million in paid advertising in *The Wall Street Journal* and *Washington Times* challenging Al Gore to debate his critics. The ads simply reminded readers that the leading spokesperson for global warming had feet of clay ... and the more the "other side" celebrated Gore, the more effective our ads became at discrediting him and the ideas he represented.

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- **Media Outreach:** Heartland's network produced more than 1,000 op-eds, letters to the editor, and news releases opposing global warming alarmism, generating thousands of media hits with combined circulation in the many-tens of millions. Heartland's views on the subject appeared in *The New York Times, Wall Street Journal, Washington Post,* and most of the major newspapers in the U.S.

- **Government Relations:** Heartland sent scores of mailings to elected officials, including the books, policy studies, and videos described above as well as *Research & Commentary* collections, invitations to events, and critiques of state-specific greenhouse gas control plans. Heartland's experts testified before Congress and in at least a dozen state legislatures. Heartland participates in ALEC's energy and natural resources task force, where our spokespersons help frame pro-energy and sound science position papers and model legislation.

We believe this effort was primarily responsible for the defeat of "cap and trade" legislation in

the U.S. Senate in June 2008, for the failure of similar efforts in the years since then, and for the decline revealed by leading polls in public belief that global warming is either man-made or a crisis. It is increasingly apparent that a majority of the American public does not believe global warming is a crisis and opposes actions taken to reduce carbon dioxide emissions in its name. We even prompted Al Gore's group, the Climate Reality Project, to run a billboard to try to refute our message! (See image.)

In 2011, Heartland's leadership of the global skeptics movement was acknowledged when the science journal *Nature* published a feature story about Heartland and Joseph Bast. In May 2012, *The Economist* referred to Heartland as "the world's most prominent think-tank promoting skepticism about man-made climate change." In October 2012, a PBS documentary titled "Climate of Doubt" featured The Heartland Institute as leading the charge against exaggeration and alarmism in the climate change debate.

As notable as our success on global warming has been, our work in that arena never exceeded half our annual budget and more often was about a third of our effort. For example, during this same period we were major players in battles over health care reform at both the state and national levels. We produced a series of policy studies showing the impact of Obamacare on the cost of health insurance and published and promoted *The Obamacare Disaster*, a book-length devastating criticism of the law by Peter Ferrara. In 2009 we acquired Consumers for Health Care Choices (CHCC) and with it an e-newsletter titled *Consumer Power Report*.

We also worked closely with the national Tea Party movement in the year leading up to the dramatic 2010 national elections. Heartland staff helped organize the first Tea Party events in Washington, DC and Chicago and helped make the call for a new tea party by Fox News's Rick Santelli go viral by being the first think tank to post it on a Web site. We provided speakers for scores of Tea Party events, distributed hundreds of thousands of publications and videos to activists, and helped educate and inform hundreds of grassroots leaders.

In 2010 we collected the eight installments of our *Legislative Principles* series – a series of pocket-sized booklets presenting succinct and carefully documented analyses of the most important public policy issues facing the nation – into a book titled *The Patriot's Toolbox.* Copies were sent to every candidate for national and state elected office in the country. New and expanded editions were produced in 2011 and 2012. All told, more than 120,000 copies of the book were distributed.

We also emerged as leaders in the school reform debate. *School Reform News* is the most influential publication on school reform in the country, read by more elected officials than any other publication on the subject. Our work in support of vouchers, tax credits, and charter schools played a role in the expansion of those reforms in many states, leading to a true

breakthrough in 2011 as states began passing state-wide programs.

Most recently, Heartland has taken the lead in promoting the Parent Trigger, a proposal to empower parents to sign petitions demanding their local school boards give them vouchers to send their children to the schools of their choice, convert the school to a charter, or implement other reforms. We are also one of the most influential critics of the Common Core education standards effort to centralize authority over K-12 curriculum.

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2012: A Breakthrough Year

Last year (2012) was a genuine break-through year for The Heartland Institute. Here is a summary of what we accomplished:

Research: Legislative specialists, managing editors, senior staff, and senior fellows worked with approximately 236 academics and professional economists and 163 elected officials who served on our Legislative Forum. We also funded a team of six scientists who are working on the next edition of *Climate Change Reconsidered.*

Publications: Heartland sent five monthly public policy newspapers to every national and state elected official in the U.S. plus 8,400 county and local officials and thousands of civic and business leaders. We also hosted a series of Web sites and blogs, sponsored PolicyBot, produce four e-newsletters, and produce books, policy studies, and booklets.

Communications: We appeared in print and on television or radio 1,004 times in 2012, with print hits reaching a paid circulation of 136 million readers. More than 1.6 million people visited our Web sites and recorded 2.6 million page views. Our Facebook page registers nearly 60,000 fans and approximately 90,000 impressions every week.

Government Relations: Our government relations staff made more than one million contacts with elected officials in 2012. A record 23,539 of those contacts were one-on-one in person, by phone, or by one-to-one emails.

Funding: Approximately 5,300 supporters supported an annual budget of $5.4 million in 2012.

Staff: A full-time staff of 35, including 25 working out of the Chicago office.

Comparing these numbers to previous years makes it clear that 2012 was a breakthrough year for us:

- **Revenue:** Year-to-year revenue rose 17 percent from 2011 to 2012. Significantly, this turn-

around occurred despite fierce competition from the Mitt Romney campaign and an effort by groups on the left to demonize our corporate supporters.

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- **Press and Online Traffic:** Although the number of print, radio, and television "hits" remained about constant – evidence of the shrinking coverage of public policy issues by daily newspapers – the circulation of our print coverage soared 53.8 percent (from 88.5 million in 2011 to 136.2 million in 2012). Online coverage rose 43.9 percent, from 2,798 in 2011 to 4,029 in 2012.

- **Events and Public Speaking:** Heartland held a record number of events (26) with record attendance (4,882), and its spokespersons addressed a record number of events hosted by other organizations (178) also with record attendance (23,353). Heartland spokespersons were more highly respected and reached larger audiences than ever before.

- **Government Relations:** Individual contacts with elected officials – by phone, one-on-one email exchanges, and in person – rose 14 percent from 2011.

- **Impact on Public Policy:** Our mission is to change public policies. In 2012 we believe we did this on an unprecedented scale in all four of our priority topic areas: environment, health care, school reform, and budget and taxes.

Looking Ahead: Good to Great

Heartland is poised to go from "good to great." Jim Collin's 2001 best-selling management book, *Good to Great: Why Some Companies Make the Leap ... and Others Don't*, identified 11 companies that "showed the following basic pattern: fifteen-year cumulative stock returns at or below the general stock market, punctuated by a transition point, then cumulative returns at least three times the market over the next fifteen years" (pp. 5–6). These companies shared six things that distinguished them from similar companies that did not go from good to great during the same time period:

- Experienced leaders with a "farmer work ethic" who were willing to put the interests of the company ahead of their own interests;

- Having the right people in key leadership positions who share the CEO's work ethic;

- Passage through a "trial by fire" that causes some people to leave the organization and others to come aboard;

- Focus on an area where mission, market, and mastery overlap;
- A culture of discipline that sets high standards and holds everyone accountable for results; and
- Use of technology to accelerate productivity and profitability but not as a substitute for any of the earlier goals or traits.

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The "About" page on our website at www.heartland.org contains endorsements of our work, videos about our history, and more information.

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