

SPN NEWS

STATE POLICY NETWORK

STRATEGIES FOR STATE THINK TANKS

FALL 2003

Celebrating Our Champions Indispensable State Think Tank Leaders Honored

Gisèle Huff honored with 2003 Roe Award

*Generous state think tank
advocate inspires leaders at
SPN Annual Meeting*

Dr. Gisèle Huff, SPN Board member and Executive Director of the Jaquelin Hume Foundation, received the 2003 Thomas A. Roe Award at State Policy Network's 11th Annual Meeting in Seattle. Huff has been instrumental in providing and attracting crucial support for state-based think tanks and her advocacy of these groups has been a tremendous boost to the movement.

The Roe Award is given each year to individuals for leadership, innovation, and accomplishment in public policy at the state and local level. Below is an excerpt of Dr. Huff's address to SPN attendees:

"I'm absolutely delighted to receive this prestigious award – To be in the same group as the legendary Pete Peters, the dedicated Senator from Colorado John Andrews, my colleague Carl Helstrom and the great leaders of our state-based think tanks who were previous recipients is an honor indeed.

Huff, Continued on page 2



Gisèle Huff (Jaquelin Hume Foundation) and Lynn Harsh (Evergreen Freedom Foundation) honored at SPN 11th Annual Meeting

Inaugural Presentation of the Overton Award

*Lynn Harsh recognized
for her leadership in
the free-market movement*

The following remarks were offered in the wake of the tragic death June 30 of Mackinac Center Senior Vice President Joseph Overton. The remarks are those of Mackinac Center Executive Vice President Joseph Lehman, a close personal friend and colleague of Overton's.

Lehman's remarks (condensed below) were delivered to honor not only Overton, for whom a new award has been named, but also in honor of the first recipient of the Overton Award, Lynn Harsh, executive director of the Evergreen Freedom Foundation, based in Olympia, Washington. The presentation was made before 250 research institute personnel at the 11th Annual Meeting of the State Policy Network on September 13, 2003 in Seattle.

"I believe one of the evidences that we are made in God's image is that we have a built-in need to honor the honorable, to admire the beautiful, and to grieve

Lehman, Continued on page 2



Inside: Direct Mail Ideas for State Think Tanks

SPN

STATE POLICY NETWORK

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I can't say enough about how much appreciate this award. Like everything else that has happened to me since I arrived in New York in 1947 after the Second World War, it is something of a miracle. At every step of the way, as I achieved the American Dream, I never forgot what it actually felt like to live in fear for five long years. The Nazi occupation of France was a nightmare that seemed unending – every day, a struggle for survival. But worst of all were the loss of hope and the loss of freedom. To endure the arbitrary rule of tyrants is to lose one's self. So as I live my life in the land of freedom, each milestone is particularly precious to me.

But this award is not about me. It's about **Tom Roe's** vision and everything you do to keep it alive.

When the **Jaquelin Hume Foundation** decided to focus on systemic school reform through school choice, it became quickly apparent to us where the action is. Education is not, and should not be, the business of the Feds. So we at the Hume Foundation consider you as a crucial sector in making school choice happen, state by state, in whatever way is most appropriate in prevailing local circumstances.

I'm a great believer in infrastructure. Not many people think about the plumbing but the most beautiful house in the world is unlivable if the plumbing doesn't work. That is why I serve on the board of SPN – it provides the necessary tools for capacity building, for helping you achieve your mission. That is why I tell my colleagues in the foundation world how important the work you do is.

I want to close with a story that **Howard Fuller**, the founder of the **Black Alliance for Educational Options**, told at a recent Children First America retreat. He was invited to speak to a group of school reformers in a small city in North Carolina. Getting from Milwaukee

to Raleigh is no mean feat in itself but the day he traveled, it was raining heavily and several delays had him landing in Raleigh at 8:30 p.m. When he picked up his rental car, he asked how far his destination was and he was told that it was a three hour drive. So he started out in the driving rain and by 11:00 o'clock, exhausted and still not in bed, he asked himself "Why am I here?" Howard's answer was because of the children, because of his commitment to free them from what President Bush called "the soft bigotry of low expectations."

As you struggle with tight budgets and the never-ending tasks of fighting for freedom, I'm sure you ask yourselves that question, too. Thomas Jefferson told us it wasn't going to be easy but we can't give up. And I'm here to tell you that you're winning, we're winning, and we have to stay the course. To quote one of the heroes of 9/11, Todd Beamer, "Are you ready, guys? Let's roll!" [SPN](#)

Lehman, Continued from page 1

deeply the loss of someone so honorable and beautiful as Joe Overton.

For those who knew him well personally as well as professionally, our loss is doubly profound. We all love to talk about the people we love, so it is a joy to tell you why I loved Joe, and also to announce for the first time tonight one way the freedom movement will keep his memory alive.

It was my inestimable privilege to work alongside Joe for eight of the last nine years at the Mackinac Center. But even before there was a Mackinac Center, Joe and I began a deep friendship 17 years ago when he was the very first person I met when I got off the plane in Midland, Mich. for a job interview.

Lehman, Continued on page 10

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SPN News reports on issues of importance to state-based, market-oriented, non-profit public policy research organizations. Drawing from current updates and events from within the industry, the publication provides timely information on the most pressing issues facing public policy state think tank executives. State Policy Network publishes *SPN News* quarterly. Individual copies can be ordered from the State Policy Network offices at (510) 965-9700.

MISSION STATEMENT

The mission of State Policy Network is to provide strategic assistance to independent research organizations devoted to discovering and developing market-oriented solutions to state and local public policy issues.

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IJ State Chapters – A New Force For Freedom



by Clint Bolick

For all the talk of conservatives and libertarians about federalism, most of our litigation over the years has focused on federal courts, often overlooking the enormous, largely untapped potential of state constitutions as bulwarks of liberty.

Indeed, our Constitution's framers intended state constitutions to serve as the first line of defense against grassroots tyranny, with federal courts acting only where state courts failed to protect liberty. Although many state courts have been hijacked by the left, state constitutions often contain a reservoir of vital protections.

For that reason, the Institute for Justice has begun launching state chapters to build upon our national work in our Washington, DC headquarters and to forge even stronger relationships with state policy organizations. Our first three chapters in Arizona, Washington state, and North Carolina already are helping to curb government abuses in such areas as private property rights, economic liberty, freedom of speech, taxpayer rights, and education.

Teaming up with groups like the Goldwater Institute, the Washington Policy Center, the Evergreen Freedom Foundation, and the John Locke Foundation has created a symbiotic relationship that makes us all more effective.

Our launch case was on behalf of Randy Bailey, a brake shop owner in Mesa. After years of nonstop anxiety about whether the city would succeed in seizing his property and handing it over (along with a \$2 million taxpayer subsidy) to a private developer, Bailey's case was vindicated this fall. In early October, the Arizona Court of Appeals unanimously struck down the City of Mesa's attempt to use eminent domain, thus allowing Bailey to hang onto the business that is rightfully his. While the federal Constitution's "public use" limitation has largely been emasculated, the Arizona Constitution contains a guarantee that "Private property shall not be taken for

private use." Bailey's story was also featured on CBS's 60 Minutes this fall, soliciting supportive letters and encouragement from around the country.



There's lots more where that came from. Unlike the federal constitution, most states allow taxpayer standing to challenge abuses of public funds. Several constitutions forbid "gifts" to private companies, "private or local" (pork-barrel) bills, public monopolies, and the like.

Teaming up with groups like the **Goldwater Institute**, the **Washington Policy Center**, the **Evergreen Freedom Foundation**, and the **John Locke Foundation** has created a symbiotic relationship that makes us all more effective.

We plan cautiously to open more chapters in the years ahead. We look for constitutions with pro-liberty provisions; an honest and at least middle-of-the-road judiciary; one or more strong policy organizations; identifiable legal talent to operate the chapter; and the prospect of financial support. Each chapter has an executive director, a staff attorney, and a support staffer; backed by our media, outreach, and development teams in our headquarters as well as by local volunteer support.

If you're interested in exploring prospects in your state, please contact me or our managing director, Deborah Simpson (dsimpson@ij.org).

As all of us have learned, you *can* fight city hall and voracious state bureaucrats. Sometimes a well-designed lawsuit can help nudge things in the right direction. State constitutional litigation can be a powerful weapon in the freedom movement's arsenal. **SPN**

Clint Bolick (cbolick@ij.org) is vice president and national director of state chapters for the Institute for Justice.

Don't Sell Direct Mail Short!

It's the Best Long-term Investment You can Make



By Kevin Gentry

I love direct mail!

Why? Because it's the most cost-effective and efficient way to:

1. Have large numbers of prospective donors self-identify as supporters of your cause; and
2. Build and cultivate relationships with your supporters, in a systematic and strategic way.

Direct mail is not perfect. But like Winston Churchill told us about democracy, "No one pretends that democracy is perfect or all-wise...democracy is the worst form of government except for all the others."

Let me explain why, fundamentally, direct mail is so valuable to your organization, particularly over the long haul. And let me give you a few tips on how state-based organizations can achieve success.

First, think about what direct mail is. **There's this huge marketplace of potential supporters.** You lay out your wares, marketing yourself appropriately. And customers voluntarily opt in as supporters, if they believe they'll benefit from the transaction. They have some expectation that you can achieve what they want. **You're a proxy to help achieve their philosophical or political goals.**

But ordinarily, as market-oriented as we might be, we rarely approach fundraising in this manner. Instead, we assemble a bunch of folks around a big table, and we brainstorm who "ought to give to us." We come up with 50-100 "targets," and we then try to "hit them up." Sounds like central planning, if you ask me. Very limiting, too. **And "hitting donors up" doesn't exactly sound like voluntary exchange.**

Yet with direct mail, in ways we could never predict from a big conference table, donors opt in as supporters for any multitude of good reasons. And many of these donors are the millionaires next door, folks you would never expect could write you a \$10,000 check. **But with direct mail, you're casting a wide net, and although**



perhaps only 1% are responding initially, you're still hauling in a lot of fish!

Once they're hauled in, of course, you completely control the communications to them. In an orderly and logical manner, you can share with them news that keeps them focused on the problem at hand, that keeps them informed about what you're doing, that sells them on your effectiveness, and arguably most important – that encourages them that their investments in you are making a difference!

**You need two things to start:
a good letter and good lists.**

With direct mail, you can do that with 20 donors. Or 200 donors. Or 2,000 donors. Or 20,000!

And from this, you can target your very best prospects for cultivation – for personal visits, for special solicitations, for board membership, and even for planned gifts.

How do you go about this stuff in your state or locality? **You need two things to start: a good letter and good lists.**

Suck it up, you're going to have to accept some form of direct mail-style in your communication. That doesn't necessarily mean hysterical language about the world

Leadership Development Initiative

coming to an end before midnight tonight. **But it does mean short words, short sentences, short paragraphs and a very conversational tone.**

Then, the package has to be just right. As personal as possible to the recipient. First class, live stamps on a hand-addressed or lasered, closed-face envelope trumps bulk postage on window envelopes. And the more personalization, the better.

A bad letter to a good list will likely do much better than a good letter to a bad list.


On the lists, you should know this: **a bad letter to a good list will likely do much better than a good letter to a bad list.** So, avoid subscriber lists. Avoid voter lists, or petition signers, or compiled lists of wealthy people. **Try to find active donor lists.** The best will be donor names from your state to national market-oriented organizations. Others will be donors to a political candidate whose philosophy you share – most of which are available from public records at your state government.

This stuff is part science – and part art!

The science is often counter-intuitive. Long letters do better than short letters. Repeating the selling message of the letter in a one-sentence postscript is very important. You can ask your donors for funds multiple times during the year. You can keep prospecting to the same lists, over and over, until the response declines sufficiently.

And the art becomes developing a gut instinct on what subject to mail when and why and to whom. You also get to express yourself in your writing. In fact, the more it sounds like you, and only you, the better.

Get going as soon as possible on this. The end of the calendar year is a great time to start.

If you embark on a deliberate effort to build a direct mail fundraising base, and if you **communicate to these new donors effectively and consistently over time**, I *guarantee* in five years, you'll button-hole me at an SPN meeting and tell me it was the smartest investment your organization ever made! 

Kevin Gentry is Vice President for Strategic Development at the Charles G. Koch Charitable Foundation.

Kevin helps free-market organizations build their fundraising capabilities. Well known for his fundraising expertise, especially in the area of high-dollar direct mail, Kevin has conducted marketing and fundraising presentations in thirty states, Canada, Chile, Panama, Poland and South Africa. He has also served as a fundraising consultant to U.S. Senator George Allen, former Virginia Governor Jim Gilmore, and numerous other elected officials, candidates, party committees and free-market organizations.

From 1997 until recently, Kevin served as vice president for both the Mercatus Center and the Institute for Humane Studies at George Mason University. Over that period, combined revenue for these two organizations more than tripled. He continues to act as a fundraising counselor to both organizations.

From 1991-1997, Kevin was executive vice president of the Leadership Institute, where he helped increase the Institute's annual revenue from \$1 million to nearly \$7 million, and also oversaw a building campaign that raised more than \$6.5 million.

Join the SPN Member Community

Join the SPN member community! Help foster a vibrant and growing state-based freedom network that now includes 90 member organizations.

SPN REGULAR MEMBERSHIP

(State-based, non-profit think tanks)

- \$250 for state think tanks five years old or less.
- \$500 for state think tanks over five years old.

SPN ASSOCIATE MEMBERSHIP

(Other non-profit think tanks, corporations, foundations)

- \$500 Benefactor
- \$1000 (and above) Patron

Regular Members and Associate Members receive SPN's quarterly newsletter, invitations to SPN training seminars, reduced registration fees for SPN events, selected access to password-protected areas of SPN's website. SPN Regular Members also receive priority consideration for SPN travel stipends and leadership training scholarships. So far in 2003, SPN has offered nearly \$50,000 in stipends and scholarships to state think tanks.

SPN WELCOMES NEW MEMBERS

The Freestate Center (Kansas)

For additional membership information, please visit SPN's website at www.spn.org/join or contact Tracie Sharp, President, at (510) 965-9700.

Can State Think Tanks Use Direct Mail Effectively?

By Whitney Garlinghouse

During the spring of this year, I carried out a study for **Yankee Institute** in Connecticut for the purpose of examining if and how the institute might employ direct mail (DM) strategies for fundraising. The methodology used was quite simple – to contact other sister organizations around the nation and learn from their first hand experiences with DM. Fourteen state think tanks were contacted. What follows here is a summary of these findings, along with specific recommendations extrapolated from this information, which could be used by any state think tank.

Summary of Findings

Generally, direct mail, in isolation, has not proven to be a good way to raise money for support of state think tanks. Prospecting is expensive and usually does not break even, although with most organizations it has come close. The lifetime value of names procured through prospecting can easily be expected to be a positive contributor to the budget. However, between the relatively small number of DM donors that can be expected from one state, the significant costs (both in dollars and administration time) involved to maintain these donors, and the modest overall return on these small DM donors in proportion to the total organization budget, one must question whether any DM is worth the effort.

Only about half of the organizations contacted are currently engaged in DM prospecting, although most have done at least some in the recent past. Although raising money is sometimes part of the reason given for using DM, other purposes are usually driving the DM efforts, including:

1. Education - To promote the organization's mission in their region and gain active supporters to help educate others.
2. As a way to gain organizational credibility by building a broad support base.
3. Branding - To raise general awareness of the organization.
4. As a way to identify substantial donor prospects for future non-DM follow-up.

As one might guess, my recommendation to Yankee Institute was to forget about the use of DM for the purpose of raising money from mail-in contributions. In addition, due to relative modest funding levels at this point in time, the first three alternate objectives listed above are simply unaffordable luxuries. Raising money needs to remain the primary focus for Yankee. Along those lines, however, use of DM to identify substantial prospects does appear to have merit.

Direct mail is only one piece of these fundraising efforts, which must be dominated by personal interaction and follow-up.

A number of the organizations that I interviewed were very cognizant of the potential for DM to identify and occasionally bring in large donations. However, no one seemed to consider this as a primary purpose for getting involved with DM in the first place. My recommendation to Yankee Institute was to do just that - to use direct mail as an ongoing, long-term tool for identifying potential large donors to the institute, and to raise the visibility of the institute with this group so as to increase their propensity to contribute.

Specific Recommendations

These were my specific recommendations to Yankee Institute that grew out of my general findings, above. Because it is, and will for the foreseeable future, always be large donors (institutional and personal) that provide major support for the work of Yankee Institute, the fundraising efforts of the institute should be singularly focused on these large donors. Direct mail is only one piece of these efforts, which must be dominated by personal interaction and follow-up.

To be consistent with the quality of donor being solicited, it is important to always put fourth a first class image. I suggested Yankee first make some improvements to their web site and logo. The actual DM effort should be viewed as a multi-year effort, so as to not overly strain the institute's budget. Lists can be procured by purchase of large donors (\$500 plus) to state political campaigns of conservatives and libertarians and by exchanging lists with like-minded organizations. As

a side note, use of a political celebrity to sign the DM letter seems to be particularly effective and important when using lists of political contributors. Sometimes, lists can be procured by the promise of a list exchange at a later date when Yankee Institute has a list that is more substantial to offer (this has been successfully done by the Capital Research Center).

My suggestion for the actual DM campaign strategy was somewhat unusual. I recommend always sending high quality, issue oriented (tax issues seem to work best) DM packages with a budgeted cost of at least \$1.50 each, asking only for large contributions of \$500 and up, but with an option to receive more free information and be added to the institute's mailing list. I expect that the number of actual contributions from these initial mailings will be small. However, the list created from these "more information" responses should be very high quality, as these individuals will understand that they are going to be solicited for large contributions going forward.

My recommendation to Yankee Institute was to use direct mail as an ongoing, long-term tool for identifying potential large donors to the institute, and to raise the visibility of the institute with this group so as to increase their propensity to contribute.

This "high roller" prospect list should be further qualified by researching the individuals on it. Although expensive software packages are available to do this, it probably can be more affordably accomplished through networking with friends of the institute, talking with the owner organizations that first provided the names, and using other publicly available information. However, it is vitally important to obtain a fairly clear picture of each person's potential to contribute.

Once prospects are identified, then coherent strategies need to be implemented to convert them to financial supporters. Generally, this necessitates frequent communication with the prospects for the purpose of educating them about the work of the institute and building their empathy and sense of involvement with the institute. This should include phone calls, mailings (always done first class and usually personalized), and events (again, always first class). Yankee Institute's existing lecture series could be an excellent opportunity

for a special pre-event for just the large donors and large donor prospects featuring the celebrity speaker in a more intimate setting. A comprehensive strategy for development of these large donor prospects went beyond the scope of this study.

Individuals & Organizations Contacted for this Study

My thanks to the individuals and organizations, listed below, that took the time to share their direct mail experiences with me, which I used in my study. Anyone wishing a copy of the study itself may write or email the Yankee Institute at P.O. Box 260660, Hartford, CT 06126 or info@yankeeinstitute.org.

John Coonradt (VP Advancement)

Mackinac Center for Public Policy

John Hood (President) *John Locke Foundation*

Sam Staley (President)

Buckeye Institute for Public Policy Solutions

Sally Pipes (President/CEO)

Pacific Research Institute for Public Policy

Richard Tostenson (Dir. Dev.)

Center of the American Experiment

Jennifer Gustpason (Dir. Dev.) *Capital Research Center*

Lindsey Moore (former Dir. Dev.) *Goldwater Institute*

Gary Palmer (President) *Alabama Policy Institute*

Jake Haulk (President)

Allegheny Institute for Public Policy

Stephen Adams (President/CEO)

Pioneer Institute for Public Policy Research

Rita Thompson (Dir. Dev.)


Texas Public Policy Foundation

Tom Carroll (President)

Empire Foundation for Policy Research

Charles Arlinghaus (President)

Josiah Bartlett Ctr. For Public Policy

Joseph Bast (President/CEO) *Heartland Institute* 

Whitney Garlinghouse is the retired owner/CEO of L.F. Garlinghouse Co., a publishing and mail order firm in Connecticut, and holds a BS in engineering from Cornell University and an MA in economics from University of Kansas. He is an active supporter of Connecticut's free market think tank, Yankee Institute.

SPN Annual Meeting Sets Record — Again

Over 250 think tank executives, corporate and foundation leaders, and public policy experts gathered in Seattle for **State Policy Network's Annual Meeting**. The event, held September 11-13, drew representatives from 130 organizations and 36 states. It was the largest such event ever for SPN, passing last year's record crowd of 175.



Left to right: Jim Miller (Wisconsin Policy Research Institute), Dan Schmidt (Bradley Foundation) and Nina Rees (Dept. of Education) discuss education reform.

One of the most important networking and training events of the year for the state-based, free market public policy community, this year's annual meeting was a powerful mixture of leadership development and policy mobilization workshops. According to **Darcy Olsen**, president of the Goldwater Institute, "It was a great conference, all the right people, and a lot of great information exchanged. I'm so glad we were able to attend."

On Friday, SPN hosted a **Technology Policy Conference** for state think tank executives at the Microsoft corporate campus. After a campus tour, Microsoft executives and experts led a workshop on how public policy affects high tech industries, and possible policy developments in the future. A discussion of various technological advances underway sparked much debate on related policy issues.



Left to right: Scott Hodge (Tax Foundation), Darcy Olsen (Goldwater Institute) and Thor Halvorssen (FIRE) at the Chateau Ste. Michelle Winery dinner.

Dinner that evening was held nearby at the exclusive Chateau Ste. Michelle Winery. **State Rep. Cathy McMorris**, Washington State's House Republican Leader, gave a legislative prospective on public issues. She was followed by **Dr. Sally Satel**, who explained how public health policy has been hijacked by political correctness. Satel serves as a resident scholar for the American Enterprise Institute and is psychiatrist and lecturer at the Yale University School of Medicine.

Saturday's events featured a mix of presentations and discussion on public policy issues, think tank



John Blundell (Institute of Economic Affairs-London) shares strategies with Betsy Chapman (Maine Public Policy Institute).



Carl Gipson and Dann Mead Smith of the Washington Policy Center, local co-hosts of the SPN Annual Meeting.

management and marketing, and a tribute to warriors in the freedom movement.

Since almost every state has faced budget deficits in the last year, the crisis in state budgets was discussed in two different workshops. A crisis in state finance can be a great opportunity for free-market ideas, said **Matthew Brouillette**. In Pennsylvania, the Commonwealth Foundation’s reaction to the governor’s tax increase proposal—including appearing in the media and buying advertising on a billboard close to the state capitol—impressed the public. “The Commonwealth Foundation is everywhere,” Brouillette often heard. **Bob Williams** explained how the budget shortfall in Washington state forced policymaker’s attention on determining core government functions.

It was a great conference, all the right people, and a lot of great information exchanged. I’m so glad we were able to attend.

-Darcy Olsen, Goldwater Institute

Other policy-focused discussions of the day addressed education, labor, and tort reform, giving conferees the opportunity to exchange ideas and learn about what works across the states. According to **J.C. Bowman**, executive director of the Center for Education Innovation, “The workshops and general sessions fulfilled my personal intellectual appetite and gave me needed insight into other pertinent issues.”

Consistent with SPN’s mission of improving the practical effectiveness of market-oriented state-based think tanks, several workshops gave executives ideas to improve their financial status and position with both the public and policy makers. **Dr. Gisèle Huff** (Jaquelin Hume Foundation) moderated a workshop on how to build successful development programs. **Dann Mead Smith** (Washington Policy Center) led a forum on building productive relationships between think tanks and corporations. Another workshop explored steps that think tanks can take to become more cost-effective.

The workshops and general sessions fulfilled my personal intellectual appetite and gave me needed insight into other pertinent issues.

-J.C. Bowman, Center for Education Innovation

Meeting participants also explored how to expand their reach to political and policy leaders and opinion leaders. In a workshop on web-based idea marketing, **Michael Rae** (Lexicom) offered several steps that organizations can use to make their websites more usable, a key to increasing web traffic. **Christopher Smith** (iEdx) explained the work of the Internet Education Exchange,



The contingent from Grassroot Institute of Hawaii: Hawaii State Senator Sam Slom, Jack Schneider, Malia Zimmerman, Dick Rowland.

an Internet-based grass-roots organization aimed at identifying, recruiting, arming, mobilizing and then deploying advocates for education reform. **Joshua Hall** (Buckeye Institute, Ohio) discussed how blogging is the next step of website marketing. (A web log, or “blog,” is an event-driven website, often featuring commentary

Annual Meeting, Continued on next page



Forbes magazine columnist and venture capitalist Dr. John Rutledge stirs the audience with his presentation on the U.S. economy.

on the news of the day.) A companion workshop featured ways to build a successful outreach to government officials.

The closing dinner on Saturday was a time for celebration and remembrance, with the presentation of the Roe and

Overton Awards to **Gisèle Huff** and **Lynn Harsh** (see cover story). **Dr. John Rutledge**, prominent venture capitalist and a columnist for *Forbes*, closed out the event with a stirring address deciphering recent economic trends and their application to public policy.

Prior to the Technology Conference and Annual Meeting, Thursday featured workshops on health care (see adjacent article) and fiscal policy, hosted by the **Atlas Economic Research Foundation** and the **Reason Public Policy Institute**, respectively.

Also on Thursday, **The Progress & Freedom Foundation** hosted a market-oriented analysis of policies affected by the digital revolution. **Ray Gifford** and **Kent Lassman** of PFF led the three-hour workshop briefing state think tanks on strategies to tackle telecommunications, intellectual property, privacy and electronic commerce issues in their states. State think tanks can look for more training and networking on these issues in the future as they rise in prominence within their states.

Thinking back on our time together, **Lawrence W. Reed**, president of the Mackinac Center for Public Policy, said “There’s no better place to get your motivational and philosophical batteries recharged than at an SPN annual meeting, and this one with a record crowd in Seattle was no exception. For our movement to grow, we need to know and converse with each other face-to-face as often as possible. SPN brings us together and the result is a synergy that makes all of our constituent members stronger and better.” **SPN**

Many Annual Meeting speakers have made their PowerPoint presentations and handouts available electronically. Contact Tracie Sharp (Sharp@spn.org) for e-mail copies of specific presentations.

Lehman, Continued from page 2

Now you might wonder what that meeting was like, if you can force yourself to imagine how Joe Overton and I acted 17 years ago. Joe was to pick me up at the airport and recruit me for an engineering job at the Dow Chemical Company. But we spent most of the evening talking about the morality of seat belt laws.

We both opposed seat belt laws, by the way.

So he asked me why I was wearing one as he drove me around. It was not the last time I felt the need to comment on Joe’s driving skills. Our lives were melded together from that moment.

Tonight we make the inaugural presentation of the Overton Award. The Overton Award will be given from time to time by the State Policy Network to a comrade in the freedom movement who exhibits qualities of leadership, loyalty, management innovation,

support for the cause of liberty, and who is also an indispensable right-hand man or woman who may not be in the limelight but whose contribution to his or her organization is nonetheless vital.

The boss of the first Overton Award honoree describes the recipient as “the glue that holds this place together.”

Of course, he is describing Lynn Harsh, executive director of the Evergreen Freedom Foundation.

Lynn has worked with Evergreen President **Bob Williams** since he hired her for his gubernatorial campaign in 1987. He knew a great leader when he saw one; that’s why he asked her five times to join him. Together, they founded Evergreen in 1991 and agreed to give it everything they had, including Lynn’s basement, for at least two years, and the

Lehman, Continued on page 12

The Third Annual State Health Care Policy Reform Summit

Seattle event focuses on consumer-driven models to confront state-based health care policy challenges

On September 11, 2003, the **Atlas Economic Research Foundation** once again teamed up with **State Policy Network** to address critical issues in health care policy at their **Third Annual State Health Care Policy Reform Summit**. Following discussions and presentations delivered earlier this year at the Atlas/SPN Regional Health Care Workshop in Boston, this program tapped into the expertise of market-oriented health care experts to provide a broader understanding of how free-market public policy institutes can affect key health care debates.

The speakers on the opening panel delivered an overview of the federal health care situation – what are the challenges imposed upon the states as a



Gerianne Hap of Eli Lilly speaks on the Competing Interests vs. Sound Public Policy panel at the Summit.

result of federal directives, rulings and laws? Seasoned health care analyst, **Greg Scandlen** (Galen Institute) delivered a hard-hitting talk about the ins and outs of federal healthcare, summing it up as largely a problem of third party payer

systems. He described the benefits of the market delivery of health care – a system which provides decision making power directly to the consumer. The Cato Institute's **Tom Miller**, likewise recommended restructuring health care policy to focus on outcomes rather than inputs – summed up as the “Four D’s” – decentralized, diverse, dynamic and depoliticized. Both speakers agreed that our health care problem isn’t a problem of money, but instead, that we have to find ways to build consumer markets.

The second panel tapped into the pharmaceutical, insurance, and medical industries to examine how competing interests frequently work at cross purposes in the industry. **Gerianne Hap** (Eli Lilly and

Company) summed up the situation: “There are multiple players, many of which can be at

odds. Each one needs to protect their piece of the pie.” Although the pharmaceuticals are viewed as one of the “deep pockets” in the industry, Ms. Hap described how only 10-15% of the health care dollar is going to pharmaceuticals. She provided an overview of the costs for pharmaceutical research and development and how price controls were hurting their development of new products.



Restructure health care policy to focus on outcomes rather than inputs
– summed up as the “Four D’s” – decentralized, diverse, dynamic and depoliticized.”

-Tom Miller, Cato Institute

Callen Locket, a representative of WellPoint, the second largest insurance company in the US, described how consumers pay, on average, 14% of their total health care out of pocket, indicating the extent to which health care has strayed from insurance in any traditional sense of the word. The major drivers of increased spending goes to drugs, hospital inpatient and outpatient services, and physician services – all areas that can be brought down through consumer directed markets

Dr. Vern Cherewatenko offered an illuminating look at how the market ideas discussed by policy analysts can – and do – work in reality. He shared his story of how, as a family practice physician, administrative duties took up far more of his time than caring for patients. Out of frustration, he formed a nonprofit association of health care practitioners who adopted a simple operating method – PIFATOS – Payment in full at time of service. He works completely outside of the

Continued on next page

third-party system, shunning all insurance, Medicaid and Medicare involvement. "Just like everything else we consume, you pay for your medical care when you get it." By avoiding third party systems, he is able to charge a "fair price" that covers his expenses and saves consumers money.



Greg Scandlen of the Galen Institute is a nationally-known champion for consumer-driven health care.

Additionally, Chereatenko's "Cares for America" program is an excellent example of civil society and voluntarism in action. For patients who are unable to pay, the doctors provide medical services and patients are expected

to volunteer in the community for "medical credits." Check out www.simplecare.org for details about how Dr. Chereatenko's programs can work for individuals, businesses, and free market think tanks!

In the luncheon presentation, **Linda Gorman** (Independence Institute, Colorado) talked about some of the lesser known programs and players that are

contributing to the expansion of government health care largess. She discussed state-specific examples such as the 'experiments' being conducted by the Robert Wood Johnson & Annie E. Casey Foundation in Colorado. She further offered market solutions to the failing socialist programs, the least of which was for other state-based institutes to clone Jon Caldara – president of the Independence Institute!

The Health Care Policy Reform Summit served as the opening sessions to the State Policy Network's annual meeting. The broader SPN meeting was an overwhelming success, attracting a record breaking 250 registrants from 130 different think tanks and other nonprofits across the US, including Hawaii and Alaska. State Policy Network and Atlas will continue their successful event collaborations in 2004, hosting regional training workshops on health care reform, tax and budget strategies and other pressing issues in the states. [SPN](#)

(Reprinted with permission from the Atlas Economic Research Foundation's Fall 2003 Highlights).

PowerPoint presentations and handouts from the Third Annual Health Care Policy Summit are available upon request. Please contact Tracie Sharp at Sharp@spn.org or 510-965-9700 to receive electronic copies.

Lehman, Continued from page 10

rest is history. And if anyone doubts that history has been made, just ask the Washington Education Association.

Lynn's resume alone shows that she is worthy of an award. But Lynn's essence doesn't show up on her resume. The real Lynn comes through when you ask her staff why she is being honored here tonight. Here are some of the things they told me about her:

"Lynn has worked so hard for so long; she's given her life for the movement." "Lynn's a great boss; she's very perceptive; she wants what's best for her people – they're not just employees to Lynn." "Lynn is visionary; she knows the movement is important for the future." "Lynn sees her work as making the world better for her sons, Jason and John." "Lynn is humble." "Lynn reminds us that it's all about people." "I admire Lynn's work ethic, her intelligence, and her drive." "Sometimes Lynn's encouragement is the only reason we keep working when a project gets tough."

Bob Williams really summed it up when he said Lynn Harsh is the glue that holds Evergreen together. In a Cathedral, some stones have high and grand placement atop lofty arches and peaks. Some stones are invisible and in the foundation. Some are for walking on, some are for holding up roofs, some are for admiring. But the mortar runs in all the joints, from the lowest to the highest stone. And if you could get the measure of all that mortar, and see it as a single mass, you just might find that the measure of the mortar is more than the measure of any one of the single stones.

Tonight we give our flowers to the living. And although not all of us may have told Joe Overton how much we admired him, we are telling Lynn how much we admire her. Congratulations, Lynn Harsh, the inaugural recipient of the Overton Award." [SPN](#)

State Policy Network Update

Alabama

The **Alabama Policy Institute** (API) celebrated its 14th anniversary Oct. 30 with a dinner featuring journalist Robert Novak as guest speaker. API has recently published "Cultural Indicators 2003" on our Web site at www.alabamapolicy.org and will soon release a report on "The Effects of Family Structure on Academic Outcomes in Alabama Public Schools." Also planned for release early in 2004 is our latest edition of "Guide to the Issues."

Arizona

On September 29, the **Goldwater Institute** released its first Legislative Report Card, a review of the 46th



Arizona Legislature's spring session. The analysis covered 191 votes in the areas of

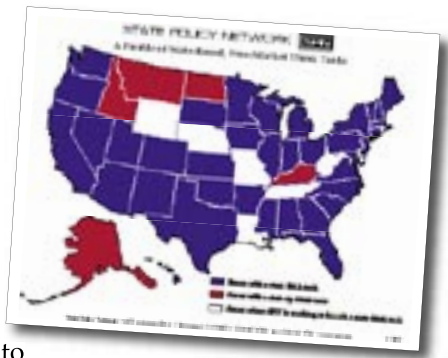
education, constitutional government, regulation, and fiscal policy. Votes were graded according to whether they promoted the principles of limited government, individual liberty, and individual responsibility. The *Tucson Citizen* gave the report card this review: "Regardless of one's political leanings, the Goldwater Institute does a thorough and useful job of political analyses. Too many government debates focus on whether to spend more money. The Goldwater Institute busies itself with pondering whether tax dollars are well spent." The Goldwater Institute also held two events during September: a luncheon address by CNN political commentator Robert Novak and a book forum for the release of *Supreme Court Gun Cases: Two Centuries of Gun Rights Revealed*, by David B. Kopel, Stephen P. Halbrook, and Alan Korwin. www.goldwaterinstitute.org

Colorado

Independence Institute's newly formed "Center for the American Dream" to preserve homeownership and mobility is now led by Randall O'Toole, who is being assisted by Kathleen Calongne. Jessica Peck Corry has taken the reigns of our 'Campus Accountability Project'. We are excited to announce that Supreme Court Justice, Antony Scalia, will be the honoree of a dinner hosted by the Independence Institute in October. Our annual Founders' Night Dinner will be on December 4th and the keynote speaker will be Ward Connerly. www.izi.org

Connecticut

The **Yankee Institute** recently completed a study showing that, if the United States were to adopt universal school choice, the annual savings would equal all the current state budget deficits combined. Put another way, what the press calls "state budget deficits" should really be called "public school monopoly overspending." The results of the Yankee study appear in an article by Lewis Andrews called "Magic Bullet" in the October/November issue of the *American Enterprise* magazine. www.yankeeinstitute.org



Georgia

Gov. Sonny Perdue has asked the **Georgia Public Policy Foundation** to be a resource for his Commission for a New Georgia, tasked with finding ways to make Georgia one of the nation's best-managed states by 2007. In line with that goal, the Foundation has launched its Health Care Initiative to seek out cost-effective health care choices for Georgians, and is partnering with Newt Gingrich's Health Transformation Center at an Oct. 23 conference, "Transforming Health and Health Care." On the environmental/free enterprise front, the Foundation has been asked to be a legislative resource as Georgia re-examines its eminent domain process for transmission-line siting. www.gppf.org

Hawaii

Grassroot Institute of Hawaii publishes frequent mini-studies on local issues. This year, #3 (February 2003) on Honolulu Airport Taxi Operations and #5 on running government education like a business have both been used by the new state administration in formulating policies. The visit of Bob McTeer, President of the Federal Reserve Bank of Dallas was a resounding success in building credibility for GRIH. He was quoted around the world, bylined Honolulu with GRIH mentioned at every speech and press interview. www.grassrootinstitute.org

Indiana

The **Indiana Policy Review Foundation** welcomes Andrea Neal, former editorial page editor of the *Indianapolis Star*, who has joined the foundation staff and is writing a weekly column on state politics. So far, 25

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newspapers have subscribed with a combined circulation of over one million readers. In fact, the IPR column has the largest single statewide readership other than the Associated Press. www.inpolicy.org

Iowa

Public Interest Institute in Mt. Pleasant, IA is providing copies of the *Iowa Civics Project* free-of-charge to high schools across the state. The *Iowa Civics Project* is a twelve-part supplemental American Government course design to focus on the various aspects of government in Iowa. Upon completion of the course, students retain the materials as a life-long resource. www.limitedgovernment.org

Kansas

The **Flint Hills Center for Public Policy** has recently established a website www.flinthills.org. This fall the Center's Consumer Driven Health Care Project is featuring programs with health care experts including Merrill Matthews (IPI, CAHI), Tom Miller (Cato) and Brian Crowley (AIMS). These experts will speak to legislators, business, medical, pharmaceutical and public audiences.

The **Freestate Center** is hosting a public debate in Lawrence, Kansas, on Friday, October 31, beginning at 2:30 p.m. (CST). The topic is "Competing Visions for an Evolving Telecom Market" and will feature U.S. Sen. Sam Brownback, NARUC vice president Marilyn Showalter, and Dr. Tom Hazlett of the **Manhattan Institute**. A live audio-visual webcast of the forum will be transmitted via internet and any interested party may log on to www.ksfreestate.org the day of the event to find simple viewing directions. Late breaking national developments in telecom policy make this an especially educational and timely event.

Maine

The **Maine Heritage Policy Center** recently received its 501(c)3 determination from the IRS, and is actively engaged in soliciting support for its work in the areas of tax/fiscal policy, health care and education reform within the state of Maine. **MHPC** recently launched its *DirigoWatch* program, providing analysis and monitoring of the recently-passed "universal" health care insurance plan for Maine. **MHPC** has formed a strategic alliance with

Interface Business News, and is providing policy analysis and commentary on public policies that impact the business climate in the state – most recently with a 4-page special insert in the October issue. Finally, a large crowd is expected on October 28 when **William F. Buckley, Jr.** will deliver the keynote remarks at the Inaugural Dinner of **The Maine Heritage Policy Center**. www.maineconomy.org

The **Maine Public Policy Institute** continues to address tax reform, healthcare, education funding, and environmental regulation. Their latest publication, "Tax Changes in Maine: The Economic Consequences," is posted on their website at www.MaineInstitute.com. The report examines the impact of two tax reform referendum; one proposed by the Maine Municipal Association and the other by the governor and legislature. Maine-STAMP was used to analyze the data and will be a useful tool in the ongoing debate about implementing tax reform for Maine.

Maryland

Three members of the Criminal Justice panel organized by the **Calvert Institute** testified by invitation at a hearing on jury trial issues organized by a Joint Judicial-Executive-Legislative Task Force on Criminal Justice in Annapolis on September 23. The Institute is continuing to organize a Health Care Program in cooperation with Maryland Business for Responsive Government and its foundation in an effort to provide a free-market alternative to proposals before the Maryland General Assembly. www.calvertinstitute.org

Michigan

The **Mackinac Center's** programs and publications in education policy and science, environment and technology policy received a huge boost over the summer with new grants in excess of \$1.5 million. The Center's comprehensive analysis of the state budget identified hundreds of opportunities for spending reductions and gave legislators the intellectual defense they needed to enact many of them and avoid a general tax hike to close a deficit. MichiganVotes.org began its third year of operation in September and the Center's "Power to Choose" seminar program is gaining significant ground in building a grassroots network of school choice supporters. The next leadership conference at the Center is scheduled for April 22-24, 2004. www.mackinac.org

Minnesota

Center of the American Experiment is launching e-Pluribus: a project to promote intellectual diversity on Minnesota college campuses. The project will give students the conservative and free market ideas they need to confidently challenge liberal orthodoxy on their campuses. Intellectual ammunition and support will be provided through a network of conservative clubs, a speakers bureau, an e-newsletter, and a mentorship program. Also, a cutting-edge web site will give students instant access to talking points on hot topics as well as the foundational principles of conservative thought. The project, directed by Katherine Kersten, the Center's Distinguished Senior Fellow for Cultural Studies, will cultivate and inspire the next generation of conservative leaders. www.amexp.org

Mississippi

The Mississippi Center for Public Policy (MCP) launched its "Governing Principles Series" with reprints of Larry Reed's *Seven Principles of Sound Public Policy* (Mackinac Center for Public Policy) and Evergreen Freedom Foundation's *Determining Government's Core Functions*. After November's legislative elections, MCP will host an orientation session for incoming freshman legislators, where Larry Reed and Colorado Senate President John Andrews will help them form a principled foundation for their term of service. This will be followed by policy seminar for all legislators, featuring Merrill Matthews, (IPI, CAHI) ALEC staff members, and other expert panels on education policy, health care policy, and tax and fiscal policy. www.msppolicy.org

Nevada

Nevada Policy Research Institute (NPRI) held its 12th Anniversary celebration and a salute to the Nevada legislators who "hung tough" on the tax war. Grover Norquist, President of Americans for Tax Reform, and NPRI Chairman, Ranson Webster, presented special awards to the lawmakers. The dinner, hosted by the Venetian Hotel, raised over \$45,000 for NPRI. www.npri.org



Helene Denney (NPRI Executive Director) with her Vice Chairman, Ted Gibson (American Pacific Corp.)

North Carolina

The John Locke Foundation has recently released three policy reports: *The Economics of Intellectual Property*; *Choice in North Carolina Education 2003*; and *Highways and Sprawl in North Carolina*. The reports are available online at http://www.johnlocke.org/policy_reports. JLF has also begun broadcasting a weekly hour-long radio program of news and commentary called *Carolina Journal Radio*. It is heard on stations across North Carolina. Recent speakers have included Lisa Graham Keegan, James Woolsey, and Richard Epstein.

Oklahoma

The Oklahoma Council of Public Affairs (OCA) recently celebrated its tenth year in the business of free-market ideas with an event that featured best-selling author, Dinesh D'Souza. At the event, OCA unveiled plans for its Capitol Freedom Fund, a fund-raising campaign which serves to renovate and occupy a new headquarters on block from the state capitol complex. The organization used this landmark moment to honor OCA founder and chairman, Dr. David R. Brown, as well as announce that they are already halfway to their three year, \$3 million goal. www.ocpathink.org

Pennsylvania

Over the last year, the Allegheny Institute has been instrumental, through our research and publications in halting a proposed countywide car rental tax and defeating a tax-increment financing plan for an upscale mall. The Institute has also prepared several analyses on City of Pittsburgh finances, which have been used by local legislators to prevent a railroading of new taxes for the City through the legislature. For more information on these and other topics, visit our website: www.alleghenyinstitute.org.

South Carolina

The South Carolina Policy Council released a detailed analysis of state and local education spending in the spring. The report led to the General Assembly calling for a statewide audit of education spending. In August, the Associated Press took the Policy Council's data and conducted a scathing review of State Department of Education employee salaries. Numerous newspapers wrote editorials regarding the Policy Council's study –

Continued on next page

echoing the need for an audit of education spending. The Policy Council will be hosting a "Tribute to Conservative Leaders" in October honoring Governor Mark Sanford, House Speaker David Wilkins, Senate President Pro Tem Glenn McConnell and Attorney General Henry McMaster. McMaster is a former chairman of the SC Policy Council. www.scpolicycouncil.com

Texas

With a special legislative session looming to reform structure of the state's education finance system, the **Texas Public Policy Foundation** has been asked to take both a leading role in developing innovative research projects, as well as in setting the tone for debate. The Foundation is also making plans for the Second Annual Policy Orientation for the Texas Legislature, to be held in late January 2004. Last year's event drew 600 attendees over four days, including most of the state's elected officials. The Foundation has also commissioned a study focusing on Medicaid reform, as well as a research project examining the viability of desalinization. www.texaspolicy.com

Utah

The **Sutherland Institute** has begun an aggressive growth campaign seeking just the right team of qualified and enthusiastic individuals for the following six positions: Vice-President of Marketing & Development, Operations Manager, Policy Analysts (2), Community Affairs Specialist, and Receptionist/Research Assistant. Please see Sutherland's website for the entire job posting: www.sutherlandinstitute.org.

In November, Sutherland will be releasing our new policy handbook on the family, *Favoring the Family: Family as the Fundamental Unity in Public Policy*.

Vermont

The Vermont branch of the National Education Association has outed the **Ethan Allen Institute** as the controlling force in "Vermont's powerful anti-public schools network". The three page attack in the September *NEA Today* member newsletter attracted wide public attention. It also was published in the state's largest Sunday newspaper, side by side with EAI's response, "Conspiracy Exposed!!!". Wrote EAI President John McLaughry, "The education Blob has the numbers, the money, and the political power, but the school choice advocates have the Idea, and the Idea terrifies the Blob." www.ethanallen.org


Washington State

The **Evergreen Freedom Foundation** recently published a report titled "No Child Left Behind in Washington?" that analyzes the new federal education bill and discusses how it can be used to benefit students in Washington State. The Foundation is also providing information about priority-based budgeting to lawmakers and organizations in 16 different states, and is working with various SPN members to replicate success battling the National Education Association and its affiliates in other states. www.effwa.org

On October 3, **Washington Policy Center** hosted the 2003 Statewide Small Business Conference for over 300 small business owners, legislators and policy experts. Conference attendees were encouraged to come up with solutions to Washington state's ailing business climate. Results were tallied and released to lawmakers, state agencies and media. The Conference was sponsored by more than 60 businesses and statewide organizations. On November 13 WPC will host its 2003 Annual Dinner with Karen Hughes--former Counselor to the President and White House Communications Director, and current advisor to the Bush administration. For more information or to register online visit www.washingtonpolicy.org or call (888) WPC-9272.

National SPN Members

Galen Institute

Consumer choice in health care is spreading rapidly throughout the country, and the **Galen Institute** released a new on-line directory in August containing product descriptions and contact information for 126 companies that facilitate the delivery of consumer-centered care (view the directory at www.galen.org/news/vendor_chart.html). Galen is focused on the impact of policy decisions on the future of medical research. In September, Galen hosted a Capitol Hill briefing to examine the impact of importing pharmaceutical price controls from Canada on patients and future cures. A five-minute video of highlights from their policy briefing is available on the Galen web site, www.galen.org. 

Submit your update! Do you have state think tank news to report? Please submit your brief updates to Sharp@spn.org before the next SPN News deadline, December 10, 2003.

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James Piereson is executive director and trustee of the John M. Olin Foundation in New York City. Before joining the foundation in 1981, Mr. Piereson was a member of the political science faculty at the University of Pennsylvania. He also serves as a member of the board of The Philanthropy Roundtable and is a member of the board of overseers of the Hoover Institution.

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