Future Caucus

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Future Caucus

aka Millennial Action Project DBA Future Caucus, fka Millennial Action Project
WASHINGTON, DC
www.futurecaucus.org
(202)480-2051

MISSION
The Future Caucus has an audacious mission: activate young leaders to bridge the partisan divide and transform American politics.

EIN
47-2802851

RULING YEAR
2015

IRS SUBSECTION
501(c)(3) Public Charity

FOUNDING YEAR
2013

MAIN ADDRESS
1701 Rhode Island Avenue NW
WASHINGTON, DC
20036

AFFILIATION TYPE
Independent Organization

CONTACT
Rochelle Colburn, COO
(202) 480-2051
Rochelle@millennialaction.org

PRESIDENT & CEO
Layla Zaidane

BOARD CHAIR
Nick Maschari

SUBJECT AREA
Public affairs

NTEE Code
Alliance/Advocacy Organizations (W01)
PROGRAMS

1. State Future Caucus Network
   Population(s) served: Adults

2. Congressional Future Caucus
   Population(s) served: Adults

3. Future Summit
   Population(s) served: Adults

4. Leadership Development
   Population(s) served: Adults

5. Innovation Fellowship
   Population(s) served: Adults

6. Future Rising Tour
   Population(s) served: Adults

7. Rising Star Awards
   Population(s) served: Adults

POPULATIONS SERVED

1. Adults

COMPLIANCE

- IRS Pub 78 Verified as of April 2024
- IRS BMF 509(a) (1) as of April 08, 2024
- A-133 Audit Required/Performed?
- Conflict of Interest Policy
- Written whistleblower policy

Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- Board Practices Reported?
- Diversity Data Reported?
- Number of Independent Board Members: 10
Programs & Results

PROGRAMS

Source: Self-Reported by Organization, February 2024

State Future Caucus Network

Population(s) Served: General/Unspecified

The mission of each State Future Caucus is to convene young and innovative legislators committed to working on the issues facing Gen Z, Millennials, and future generations. Future Caucus members are committed to pragmatically working towards a culture of political cooperation.

Congressional Future Caucus

Population(s) Served: General/Unspecified

The Congressional Future Caucus is our nation’s first and only bipartisan caucus for young members of Congress. These members come together across partisan lines to creatively and pragmatically forge common ground on issues facing America’s next generation, such as higher education, entrepreneurship, and veteran’s employment.

Future Caucus members are committed to engaging in nonpartisan outreach to other Gen Z and millennials and building key generational relationships across the aisle.

Future Summit

Population(s) Served: Adults

Each summer, the Future Caucus hosts the largest bipartisan convening of young state legislators during the Future Summit. Over the past seven years, hundreds of legislators from across the country have set aside party differences and joined together to collaborate, share policy ideas, and gain insight from national policy experts. The Future Summit serves as a central location for policymakers to highlight their efforts and propose solutions to advance legislation in areas disproportionately affecting Gen Z, millennial and future generations.

Leadership Development

Population(s) Served: n/a

Future Caucus’ leadership development programs equip young leaders to overcome toxic polarization so they can transform American politics through collaborative governance. Future Caucus provides a suite of trainings, workshops, fellowships, and leadership development experiences to Gen Z and Millennial legislators. We tailor each session to the unique challenges and opportunities faced by young people in elected office:

- Lunch & Learns hosted “by legislators for legislators” to exemplifies a skill that could be modeled as a best practice for others.
- Leadership development sessions with co-chairs of our State Future Caucus Network to support their ability to organize and lead their caucuses.
- A community of practice to support caucuses who want to learn how to move past differences to effectively collaborate with their peers.
- Opportunities for the greater Future Caucus network to develop their leadership skills.

Innovation Fellowship

Population(s) Served: n/a

Our Innovation Fellows are members of the State Future Caucus Network and focus on issue areas important to future generations, including:

- Strengthening Democracy – Our young legislators are working together to modernize legislatures, safeguard our elections, ensure that all eligible voters can cast ballots, and bring lawmaking into the 21st century.
- Energy & Environment – Our legislators are leading the fight to introduce cutting-edge technologies that modernize energy production and grid infrastructure, and environmental protections that improve Americans’ quality of life.
- Pursuing Justice – Our legislators are leading the nation with bipartisan coalitions to address sentencing reform, recidivism reduction, and justice reinvestment.
- Future of Work – Our young legislators work across the political aisle to develop policies that will drive innovation while securing workers’ and students’ rights.

Future Rising Tour

Population(s) Served: n/a

Future Caucus leaders are preparing for the 2024 legislative session in their respective states. And scores of newly elected, young legislators will be joining their coalition of problem solvers.

Following our successful “On the Rise” tour in 2023, the Future Rising Tour will add more states, increase training opportunities for newly elected officials, create networking and collaboration opportunities and celebrate the big ideas young people are bringing into their statehouses and connect this new generation of leadership. Each tour stop focuses on preparing our state-based Future Caucuses to transcend toxic polarization and achieve future-oriented policy goals in 2024.

Rising Star Awards

Population(s) Served: n/a
Each December, Future Caucus recognizes legislators from the State Future Caucus Network (SFCN) during our annual Rising Star Awards.

The Rising Star Award highlights young leaders—one Republican and one Democrat—and their contributions to the SFCN over the last year. It aims to recognize SFCN members who embody our vision of transcending political tribalism. The Rising Star Award honors leaders who take initiative in shepherding bipartisan legislation that addresses priority issues in today’s political climate.

The Cherisse Eatmon Collective Impact Award recognizes an outstanding state caucus for their future-focused leadership and political bridge-building.

Nominees are selected based on their active engagement with Future Caucus events and their efforts in promoting political collaboration within their state.
RESULTS

Number of states in State Future Caucus Network

Population(s) Served: No target populations selected
Related program: State Future Caucus Network
Notes: In 2018, MAP made the critical decision to slow the growth of the SFCN in order to focus on a deeper engagement strategy with each state in order to maintain and enhance the quality of the program.

Number of state legislators engaged

Population(s) Served: No target populations selected
Related program: State Future Caucus Network
Notes: Includes legislators in states outside of the Future Caucus Network.

Number of Congressional Future Caucus members

Population(s) Served: No target populations selected
Related program: Congressional Future Caucus

More results from this organization's programs

Number of donations made by board members

Population(s) Served: No target populations selected
Related program:
Notes: Represented as a percentage

Number of cross-state campaigns

Population(s) Served: No target populations selected
Related program: State Future Caucus Network
CHARTING IMPACT

What is the organization aiming to accomplish?

In 2013, Future Caucus organized Americas first-ever bipartisan caucus for young members of Congress, the Congressional Future Caucus. Shaping the next generation of leadership, our Future Caucus model has expanded into nearly 33 state legislatures, and the organization has grown into the largest nonpartisan network of millennial elected officials in the U.S. Future Caucus and its state network are working to restore trust in government by bridging the divide between young elected officials on both sides of the aisle.

In ten years of work, Future Caucus has built a network of more than 1,800 young elected leaders across the country. In our next chapter of organizational growth and impact, achieving the following objectives will enable us to scale the infrastructure weve built, harness the energy of the next generation, and protect our democracy:

CONNECT – Future Caucus establishes, builds, and maintains the body of elected officials in Congress and in states in the Future Caucus Network.

TRAIN – Future Caucus provides legislators with the skills and leadership development they need have an impactful career.

CATALYZE – Future Caucus activates our network to advance key and emerging policy issues and promotes post-partisan policymaking.

AMPLIFY – Future Caucus continues to boost the visibility of legislators and caucuses in their communities through effective storytelling and media campaigns.

What are the organization's key strategies for making this happen?

CONNECT
-- Support legislators to find like minded leaders, build relationships, and enact effective legislation.
-- Strengthen the Future Caucus network by growing pipeline of young elected leaders joining Future Caucuses.
-- Build the identity of Future Caucuses.

TRAIN
-- Build capacity of Future Caucus legislators
-- Create professional development content, interactive trainings, and tools that respond to identified needs: leadership skills, digital communications capacity, legislative negotiations, and others.
-- Establish partnerships to build, deliver, and practice the suite of tools.

CATALYZE
-- Equip Future Caucus leaders to solve select critical national problems.
-- Make Future Caucus the pre-eminent thought leader in new approaches to leadership and policymaking.

AMPLIFY
-- Continue to boost the visibility of legislators and caucuses in their communities through effective storytelling and media campaigns.
-- Create media (earned, paid, shared, print) opportunities to showcase bipartisan policy achievements of Future Caucus members, and frame the collective work of young lawmakers.

What are the organization's capabilities for doing this?

Future Caucus is in a period of growth, both internally and externally. While Future Caucus' staff has grown to support the scaling of
its programs and services, so too has its Board of Directors, Board of Advisors, and circle of supporters and funders. Our organizational culture is rooted in empowerment, embracing shared leadership and the collective wisdom of our diverse team. We also understand the importance of self-renewal and creating space for rest and rejuvenation to prevent burnout and maintain long-term sustainability. Finally, we remain deeply connected through personal relationships, institutional links, and community networks, which provide the support and resources necessary to adapt and thrive in an ever-changing landscape. In essence, our adaptability and resilience are built on purpose, agility, openness, empowerment, and a strong network of connections, ensuring our continued effectiveness in advancing pluralist policy outcomes and strengthening democracy in the face of evolving challenges.

What have and haven’t they accomplished so far?

In the years before Future Caucus' founding, the U.S. was rapidly descending into one of the most dysfunctional periods of our history. In 2011, this dysfunction snowballed, nearly forcing a national default and causing the first-ever downgrade of the U.S. credit rating. In 2013, a group of Truman Scholars, who were deeply concerned about the direction of the country but inspired by the potential for a new generation of leadership, came together to launch the Congressional Future Caucus and renew American democracy under the name Millennial Action Project. Soon after, state policymakers began reaching out to MAP to ask for Future Caucuses in their states, and MAP quickly began helping young lawmakers start chapters in state legislatures across the country. In 2021 Layla Zaidane, MAP's then COO, replaced MAP's founder, Steven Olikara, as President and CEO and worked with legislators, partners, and staff to create a five-year strategic plan for growing MAPs membership and programming. Under her leadership, our Future Caucus Network has grown to include more than 1,800 young elected officials in 33 states and in Congress, and our programming now offers legislators year-round access to relationship-building opportunities, skills-based training, and policy resources.

To fully realize our vision, we know we must make space in our organization for the rising Gen Zers who are winning elected office. Last year saw a 170% increase in Gen Z representation at the state level, and this year MAP welcomed 75 Gen Z legislators into our network. To align our branding with our increasingly younger membership, we renamed our organization from Millennial Action Project to Future Caucus in 2023. Our new name will allow our organization to grow in ways unimaginable to us today, as the name focuses on the aspirational idea of people united for a better future.

Future Caucus' programming helps these leaders build generational relationships across the aisle; cross-pollinate best practices and future-looking policy ideas; and promote inclusive political discourse to state and national constituencies. This model has not only enhanced the governing capacity of Gen Z and millennials but also produced significant bipartisan successes on: voting and gerrymandering reforms, clean energy, gun violence prevention, technical education, and more.
Financials

FISCAL YEAR START: 01/01
FISCAL YEAR END: 12/31

Financial Trends Analysis

Business Model Indicators

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<tr>
<th>Profitability</th>
<th>2017</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<tr>
<td>Unrestricted surplus (deficit)</td>
<td>-$75,504</td>
<td>$266,188</td>
<td>$2,306,728</td>
<td>$67,620</td>
<td>-$198,993</td>
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<td>before depreciation</td>
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<td>22.6%</td>
<td>167.9%</td>
<td>3.9%</td>
<td>-11.8%</td>
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<tr>
<td>As a % of expenses</td>
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<td></td>
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<tr>
<td>Unrestricted surplus (deficit)</td>
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<td>$265,968</td>
<td>$2,305,640</td>
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<td>-$201,457</td>
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<tr>
<td>after depreciation</td>
<td>-12.0%</td>
<td>22.6%</td>
<td>167.7%</td>
<td>3.8%</td>
<td>-12.0%</td>
</tr>
<tr>
<td>as a % of expenses</td>
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<td></td>
<td></td>
<td></td>
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</tr>
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</table>

Revenue Composition

| Total revenue (unrestricted & restricted) | $708,982 | $1,383,167 | $3,870,567 | $1,616,542 | $1,848,389 |
| Total revenue, % change over prior year | -26.7%  | 0.0%       | 179.8%    | -58.2%    | 14.3%     |
| Program services revenue             | 0.0%    | 0.0%       | 0.0%      | 0.0%      | 0.0%      |
| Membership dues                      | 0.0%    | 0.0%       | 0.0%      | 0.0%      | 0.0%      |
| Investment income                    | 0.0%    | 0.2%       | 0.1%      | 0.0%      | 2.2%      |
| Government grants                    | 0.0%    | 0.0%       | 0.0%      | 0.0%      | 0.0%      |
| All other grants and contributions   | 100.0%  | 99.8%      | 99.9%     | 90.8%     | 97.8%     |
| Other revenue                        | 0.0%    | 0.0%       | 0.0%      | 9.2%      | 0.0%      |

Expense Composition

| Total expenses before depreciation  | $630,486 | $1,178,149 | $1,373,725 | $1,739,036 | $1,683,250 |
| Total expenses, % change over prior year | 59.3% | 0.0%       | 16.6%      | 26.6%      | -3.2%      |
| Personnel                           | 66.6%    | 60.2%      | 75.0%      | 73.2%      | 68.6%      |
| Professional Fees                   | 3.4%     | 5.8%       | 8.9%       | 14.0%      | 15.8%      |
| Occupancy                           | 8.3%     | 9.9%       | 8.3%       | 5.3%       | 2.9%       |
| Interest                            | 0.0%     | 0.0%       | 0.1%       | 0.0%       | 0.0%       |
| Pass-Through                        | 0.0%     | 0.0%       | 0.0%       | 0.0%       | 0.0%       |
| All other expenses                  | 21.8%    | 24.1%      | 7.6%       | 7.5%       | 12.8%      |
Financial Trends Analysis, continued

Moving Toward Full Cost Coverage

<table>
<thead>
<tr>
<th>Full Cost Components (estimated)</th>
<th>2017</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<tbody>
<tr>
<td>Total Expenses (after depreciation)</td>
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<td>One Month of Savings</td>
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<td>Fixed Asset Additions</td>
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<tr>
<td>Total Full Costs (estimated)</td>
<td>$683,027</td>
<td>$1,278,748</td>
<td>$1,495,772</td>
<td>$2,037,271</td>
<td>$1,825,985</td>
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Capital Structure Indicators

Liquidity

|Months of cash| 14.1 | 6.0 | 4.9 | 5.5 | 6.7 |
|Months of cash and investments| 14.1 | 10.7 | 32.2 | 23.7 | 25.7 |
|Months of estimated liquid unrestricted net assets| 13.7 | 10.8 | 29.3 | 23.6 | 23.0 |

Balance Sheet Composition

| Cash| $742,449 | $593,331 | $561,324 | $798,924 | $942,449 |
|Investments| $0 | $455,049 | $3,129,007 | $2,629,314 | $2,655,633 |
|Receivables| $154,000 | $29,411 | $13 | $21,500 | $25,000 |
|Gross land, buildings, and equipment (LBE)| $0 | $2,200 | $8,682 | $12,318 | $12,318 |
|Accumulated depreciation (% of LBE)| 0.0% | 10.0% | 15.1% | 27.7% | 47.7% |
|Liabilities (as % of LBE)| 2.9% | 1.9% | 4.2% | 0.8% | 1.0% |
|Unrestricted net assets| $718,666 | $1,060,131 | $3,365,771 | $3,431,291 | $3,229,834 |
|Temporarily restricted net assets| $154,000 | N/A | N/A | N/A | N/A |
|Permanently restricted net assets| $0 | N/A | N/A | N/A | N/A |
|Total restricted net assets| $154,000 | $0 | $190,114 | $0 | $364,132 |
|Total net assets| $872,666 | $1,060,131 | $3,555,885 | $3,431,291 | $3,593,966 |

Key Data Checks

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<th>Material Data Errors</th>
<th>2017</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<td>No</td>
<td>No</td>
<td>No</td>
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</tbody>
</table>

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit’s financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- Formulas for key metrics
- Key Revenue & Expense Data from Form 990
- Key Balance Sheet Data from Form 990
Operations

Source: Self-Reported by Organization, February 2024

PRESIDENT & CEO
Layla Zaidane
[LinkedIn profile]

BOARD CHAIR
Nick Maschari
Mission North

BOARD MEMBERS
Laurie Heim
Consultant
Nick Maschari
Mission North
Maryfrances Metrick
M Metrick Advisory
Nancy Roman
Partnerships for Healthier America
Erica Williams
Public Company Accounting Oversight Board (PCAOB)
Layla Zaidane
Millennial Action Project
David Rokeach
Scale AI
Ellen Kim
Rotunda Capital Partners
Rachel Pearson
Pearson & Associates
David Burd
Heidrick & Struggles
Jose Diaz
Ballard Partners

NUMBER OF EMPLOYEES
Source: IRS Form 990

[Graph showing number of employees from 2016 to 2022, peaking at 21 in 2021]
# OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

**FISCAL YEAR 2021**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
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<tbody>
<tr>
<td>Layla Zaidane</td>
<td>President &amp; CEO</td>
<td>$152,437</td>
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<tr>
<td>Nicholas Maschari</td>
<td>Board Member and Chair</td>
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<td>$0</td>
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<tr>
<td>Erica Williams</td>
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<tr>
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## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

### FISCAL YEAR 2020

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<td>$161,446</td>
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<tr>
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### OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

**FISCAL YEAR 2019**

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<td>Board Member</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

**FISCAL YEAR 2017**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Compensation</th>
<th>Other</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steven Olikara</td>
<td>President</td>
<td>$86,091</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Layla Zaidane</td>
<td>Ex-Officio; Secretary; Chief Operating Officer</td>
<td>$84,997</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Shane Bateman</td>
<td>Treasurer; Chair of Finance &amp; Audit Committees</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>David Burd</td>
<td>Board Chair</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Ling Ling Chang</td>
<td>Director</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nick Maschari</td>
<td>Chair of Governance &amp; Nominations Committees</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Aiison Overseth</td>
<td>Director</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Nancy Roman</td>
<td>Director</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Stephanie Valle</td>
<td>Director</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Erica Williams</td>
<td>Director</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</table>
### Paid Preparers
#### FISCAL YEAR 2022

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting &amp; Automation Solutions</td>
<td>47-4559062</td>
<td>2450 Ortega St, San Francisco CA 94122 USA</td>
<td>415-633-6908</td>
</tr>
</tbody>
</table>

### Paid Preparers
#### FISCAL YEAR 2021

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting &amp; Automation Solutions</td>
<td>474559062</td>
<td>2450 Ortega St, San Francisco CA 94122</td>
<td>4156336908</td>
</tr>
</tbody>
</table>

### Paid Preparers
#### FISCAL YEAR 2020

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm EIN</th>
<th>Firm Address</th>
<th>Firm Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting &amp; Automation Solutions</td>
<td>474559062</td>
<td>2450 Ortega St, San Francisco CA 94122</td>
<td>4156336908</td>
</tr>
</tbody>
</table>
Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

The organization's leader identifies as:

Race & Ethnicity  Arab American
Gender Identity  Female, Not transgender
Sexual Orientation  Heterosexual or Straight
Disability Status  Person without a disability

Race & Ethnicity

No data

Gender Identity

Transgender Identity

No data

Sexual Orientation

No data

Disability

No data.
# Appendix

## Key Documents

### IRS Forms 990
- 2022 990
- 2021 990
- 2020 990
- 2019 990
- 2017 990

### IRS Forms 990T
- Not Available

### Audited Financial Statements
- 2022 Audited Financial Statement
- 2021 Audited Financial Statement
- 2020 Audited Financial Statement

### Key Organization Documents
- Letter of Determination
- Key Revenue & Expense Data from Form 990
- Key Balance Sheet Data from Form 990
## Future Caucus

Aka Millennial Action Project DBA Future Caucus

1701 Rhode Island Avenue Nw
Washington, DC 20036

- **Foundation Status Code:** PC*
- Public charity described in section 509(a)(1) or (2)

### IRS Publication 78 Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization name</td>
<td>Millennial Action Project</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>Washington, DC</td>
</tr>
<tr>
<td>Most recent IRS Publication 78</td>
<td>April 2024</td>
</tr>
<tr>
<td>EIN</td>
<td>47-2802851</td>
</tr>
<tr>
<td>Deductibility status description</td>
<td>A public charity (50% deductibility limitation).</td>
</tr>
<tr>
<td><strong>Verified with most recent Internal Revenue Bulletin</strong></td>
<td>April 08, 2024</td>
</tr>
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</table>

### IRS Business Master File Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization name</td>
<td>MILLENNIAL ACTION PROJECT</td>
</tr>
<tr>
<td><strong>Most recent IRS BMF</strong></td>
<td>April 08 2024</td>
</tr>
<tr>
<td>IRS subsection</td>
<td>This organization is a 501(c)(3) Public Charity</td>
</tr>
<tr>
<td><strong>Ruling date</strong></td>
<td>10/2015</td>
</tr>
</tbody>
</table>

This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which ‘type’ can’t be determined).

On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization. Learn more

*IRS Revenue Procedure 2011-33* allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee’s public charity classification under section 509 (a) (1), (2) or (3).

## GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.
- IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.
- IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.
- IRS Automatic Revocation of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.
- The Foundation Status Code is a value derived by mapping the codes found on the 990PF filing instructions to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.
- The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list contains organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.