GIST is an informal association of grantmakers from national, regional and local philanthropies that are active in improving the economic well-being of low-income families in the United States. It operates as an umbrella group for participating foundations, providing a forum for strategic discussion. In 2017 GIST sponsored or cosponsored 25 events and supported five working groups. Participation in GIST remained strong with 249 funders participating in the GIST network. GIST gained 47 new members in 2017, including representation from 18 new foundations or affinity group partners. GIST staff worked closely with the Steering Committee to plan and carry out several successful events that advanced GIST goals. Through its work, GIST has helped grantmakers to:

- **Deepen their understanding of the cross-cutting issues of poverty and economic opportunity, support for low-wage workers, and adequate public resources.** Events are well attended and engage GIST members as well as other grantmaker affinity groups -- including the Early Childhood Funders’ Collaborative, EITC Funders Network, Funders’ Committee for Civic Participation, Funders for Just Economy, Grantmakers Concerned with Immigrants and Refugees, Grantmakers In Health, Peace and Security Funders Group, United Philanthropy Forum, Workforce Matters and others -- in poverty alleviation, economic opportunity and tax and budget issues. Notably, GIST engaged with one or more affinity groups for almost all events.

- **Keep abreast of policy developments, advocacy strategies, cutting-edge ideas and communications innovations that support effective grantmaking.** High-profile grantmaker briefings and virtual webinars provide members with a wealth of information, resources, and ideas related to GIST’s priority issues. The meetings are designed to include a mix of presentations and discussions with leading national thinkers, practitioners, and advocates as well as grantmaker updates and strategy sessions. Webinars are scheduled as needed to respond to emerging opportunities or needs and enhance information sharing and participation in GIST between meetings. Evaluations indicate participants are satisfied with event agendas and content, and intend to incorporate the information they learned in their grantmaking.

- **Work collaboratively to support policies and program initiatives.** GIST provided staff support for five working groups, including the Communications Collaborative, EITC Fund, GIST Mapping Project, Budget Working Group, and Funders Strategy Room. Working groups offer funders opportunities for information sharing and learning as well as the coordination and alignment of investments among identified areas of interest.
- **Strengthen philanthropic investments aimed at alleviating poverty and providing opportunity for all families to achieve economic stability.** GIST briefings help educate foundation representatives and philanthropic advisors about the importance of income security issues and the role that foundations can play in supporting and expanding research, advocacy, and grassroots organizing in the field. Special strategy sessions held at these briefing provided grantmakers with the opportunity to reflect on presentations and discussions and consider strategies and opportunities for investments both individually and collectively. GIST also administers the EITC Fund (The Fund), to build public support for state EITCs. The Fund is guided by an advisory group and administered by GIST in partnership with the EITC Funders Network, Center on Budget and Policy Priorities and the Hatcher Group. The Fund provides rapid response, campaign, and policy development support to state networks working to create, protect and expand state EITCs.

Major activities and accomplishments are outlined below.

1. **Planning and coordinating in–person and virtual GIST meetings and events.** GIST held four meetings and eight webinars (where GIST staff had primary role in planning and implementation), reaching 550 grantmakers.

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 2017</td>
<td>GIST Teleconference: Funder Strategy Room Working Group</td>
<td>17</td>
</tr>
<tr>
<td>Mar 2017</td>
<td>GIST Meeting - Philanthropy's Response to Our Nation's High Stakes Budget and Tax Debates: 14th Annual Briefing and Strategy Discussion for Grantmakers</td>
<td>50</td>
</tr>
<tr>
<td>Mar 2017</td>
<td>GIST Meeting: Funder Strategy Room Working Group</td>
<td>29</td>
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<tr>
<td>June 2017</td>
<td>GIST Teleconference: Funder Strategy Room Working Group (2)</td>
<td>17</td>
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<tr>
<td>October 2017</td>
<td>GIST Meeting: Philanthropy, Racial Equity and Fiscal Policy</td>
<td>60</td>
</tr>
<tr>
<td>October 2017</td>
<td>GIST Meeting: Funder Strategy Room Working Group</td>
<td>22</td>
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<tr>
<td><strong>TOTAL</strong></td>
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<td><strong>550</strong></td>
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See a detailed description of each event below.

**Meetings**

- **GIST Meeting - Philanthropy’s Response to Our Nation’s High Stakes Budget and Tax Debates: 14th Annual Briefing and Strategy Discussion for Grantmakers** was held on March 1, 2017. The meeting explored pressing political developments, federal and state budget and tax issues, and emerging advocacy and communications strategies for protecting programs and policies that support low-income families, workers and communities. Fifty funders registered for this event, including representatives from eight partner affinity groups. An additional 24 funders participated via web stream and local viewing parties were held in six cities - Cleveland, Philadelphia, Phoenix, Pittsburgh, and Providence.

- **GIST Meeting – Funder Strategy Room** was held on March 2, 2017. This meeting provided participants an opportunity to learn about funder investments responding to the new policy environment and explore areas of alignment and coordination in the short- and longer-term. Twenty-nine funders registered for this event.

- **GIST Meeting - Philanthropy, Racial Equity and Fiscal Policy** was held on October 10, 2017. This one-day funder discussion explored the system of racial inequity, key policy changes that can move us towards a more racially equitable economy and society, and how funders are applying a racial equity lens both internally in their institutions and externally in their grantmaking. Sixty funders registered for this event.

- **GIST Meeting – Funder Strategy Room** was held on October 11, 2017. This meeting provided participants an opportunity to learn about funder investments responding to the new policy environment and explore areas of alignment and coordination in the short- and longer-term. Twenty-two funders registered for this event.

**Teleconferences and Webinars**

- **GIST Call - Funder Strategy Room** was held on January 6, 2017 to hear from funder colleagues about how they are retooling/refining investments to address some of the issues we have raised on previous calls. A total of 17 funders participated in this call.

- **Cosponsored Webinar: Digital Security in an Age of Hacking & Cyberthreats: What Grantmakers Should Know** was held on June 8, 2017. Non-profit organizations are increasingly grappling with the threat of cyberattacks-- and turning to their funders for support. Nine donor affinity groups offered this webinar focused on how funders can support grantees in addressing and responding to digital security concerns. Cosponsored by the Consultative Group on Biological Diversity, Funders’ Committee for Civic Participation, Funders Concerned About AIDS, Funders for Reproductive Equity, Global Philanthropy Project, Grantmakers Income Security Taskforce, Health and Environmental Funders Network, and International Human Rights Funders Group. A total of 175 funders registered for this event.
• **GIST Call – Funder Strategy Room, North Carolina Deep Dive** was held on June 13, 2017 to provide a platform for sharing about current strategies to build the capacity of policy, advocacy and engagement efforts in a specific state to address the federal policy debate in the areas of safety net, ACA/Medicaid, immigrant families and workers’ rights, identify areas of potential alignment across funders, and highlight needs and ways to strengthen the efforts of nonprofit policy, advocacy and engagement activities. Fifteen funders participated in this event.

• **GIST Call – Funder Strategy Room** was held on June 26, 2017 to share what we have learned about the emerging policy environment and strategies in the areas of ACA/Medicaid, safety net, immigrant families and communities, and workers’ rights, assess the field’s response, and identify capacity needed to meet the challenges of the months ahead. Twelve funders participated in this event.

• **Cosponsored Webinar – What's Next in the Movement for Working Families: Opportunities for Offense and Building Power in the States** was held on August 2, 2017 and cosponsored by the Ford Foundation, Funders for a Just Economy, Funders’ Committee for Civic Participation, Grantmakers Income Security Taskforce, Open Society Foundations, and Wyss Foundation. This call explored the momentum built by policy wins in Oregon and six cities and examples of powerful worker-led campaigns and innovative strategies to build the voice of service sector workers in their workplaces, with policymakers, and at the ballot box in important cities and states across the country. Fifty funders registered for this event.

• **Cosponsored Webinar - Families in the Balance: What does the Policy Debate Mean for Immigrant Families’ Economic Security?** was held on September 12, 2017 and cosponsored by the EITC Funders Network, Grantmakers Income Security Taskforce and Grantmakers Concerned with Immigrants and Refugees. This call explored the profound and wide-ranging challenges to immigrant families’ economic security. Eighty funders registered for this event.

• **Cosponsored Webinar - Winning the Budget and Tax Fights: New Messaging and Civic Engagement Strategies to Protect Working Families** was held on September 13, 2017 and cosponsored by the Grantmakers Income Security Taskforce and Funders’ Committee for Civic Participation. This call explored the latest messaging research on budget and tax, and how groups like Center for American Progress and Indivisible are working together and with groups on the ground to educate the public on what’s at stake. Twenty-five funders registered for this event.

• **GIST Call - When Worst Case Scenarios Become Reality: A Funders’ Conversation on Opposition Attacks** was held on November 28, 2017. This call explored the threat of opposition attacks leading up to the federal tax debates, the nature and impact of opposition attacks and how funders and grantees have responded in the past and shared resources and tools on how to anticipate and respond should further attacks occur. Twenty-five funders registered for this event.
GIST also cosponsored one meeting and twelve webinars led by partner affinity groups (where GIST staff had primary promotion role). Participation data not available for these events. See a detailed description of these events below.

**Cosponsored Meetings**

- *Organizing for Wall Street Accountability and Financial Reform Funders’ Briefing and Discussion* was held on March 29, 2017 in Washington, DC. Funders and a of community of grassroots activists and policy advocates joined together for a half-day funder briefing and discussion to explore the political economy behind financial reform and inequality; learn more about local and state campaigns that are successfully challenging inequality, austerity, the corporatization of our democracy; and help develop new strategies for building a powerful, multi-racial movement that will defend critical reforms and advance new reforms that address racial and economic inequality and the concentration of power and wealth of the financial sector. Hosted by American Federation of Teachers, Arca Foundation, Communication Workers of America, Ford Foundation, Inclusive Economy Fund, Open Society Foundations, Solidago Foundation and See Forward Fund and Cohosted by Funders’ Committee for Civic Participation Money and Politics Working Group, Funders for a Just Economy, Grantmakers’ Income Security Task Force, Neighborhood Funders’ Group, and Solidaire Network.

**Cosponsored Teleconferences and Webinars**

  - *Perspectives on Sanctuary Policies* (February 16, 2017)
  - *What is at Stake in the Global Refugee Crisis?* (April 20, 2017)
  - *Recent Policy Developments and Their Impact* (May 17, 2017)
  - *Trauma and Resilience: Supporting Immigrant Children, their Families, and Our Communities through Collaboration* (June 15, 2017)
  - *July Immigration Policy Call* (July 20, 2017)
• **FCCP Webinar: Countering State Preemption and Protecting the Power of Local Government** was held on July 10, 2017. This webinar explored the landscape of state preemption and shared newly developed legal theories and strategies to push back preemption as well as organizing and communications tactics that have been used in specific states to protect the power of local democracy. Cosponsored by the Environmental Grantmakers Association, Grantmakers Concerned with Immigrants and Refugees, Grantmakers Income Security Taskforce, Neighborhood Funders Group, Philanthropy New York, and Women Donors Network.


• **FCCP Election Webinar Series.** Starting in October 2017 and running through 2018, GIST joined together with the Funders’ Committee for Civic Participation and other affinity group partners to cosponsor a series of webinars to help funders unpack the key issues at play in the midterm elections. Cosponsored by the Environmental Grantmakers Association, Grantmakers Concerned with Immigrants and Refugees, Grantmakers In Health, Grantmakers Income Security Taskforce, Health and Environmental Funders Network, Neighborhood Funders Group, Philanthropy New York, United Philanthropy Forum, and Women Donors Network.
  - The 2018 Elections and Nonpartisan Grantmaking (October 2, 2017)
  - Voting Trends + Building Power in the AAPI Community (November 6, 2017)

• **FCCP Webinar: KEY 2020 CENSUS MILESTONES: Preparing to Invest in a Fair and Accurate Count** was held on November 16, 2017 to learn more about important milestones before and during the 2020 Census, and ways foundations can support “Get Out the Count” activities, including participation in state and local Complete Count Committees. Cosponsored by include the Environmental Grantmakers Association, Funders Concerned About AIDS, Funders for LGBTQ Issues, Funders for Reproductive Equity, Funders Together to End Homelessness, Grantmakers Concerned with Immigrants and Refugees, Grantmakers In Health, Grantmakers Income Security Taskforce, PEAK Grantmaking, Philanthropy California, Philanthropy Northwest, and United Philanthropy Forum.
2. **Planning and coordinating working groups.** GIST provides a neutral platform for funders to convene and has the capacity to staff and incubate working groups. GIST staffed five working groups in 2017.

- **EITC Fund (The Fund):** To help improve the efforts to protect current and create new state EITCs, the Grantmakers Income Security Taskforce and the EITC Funders Network administer and oversee three funds:
  - The EITC Rapid Response Fund (EITC RRF) was established in 2012 and focuses on quick infusions of support to help an existing effort overcome a communications challenge or opportunity. Awards are made on a rolling basis and range from $15,000-$30,000.
  - The EITC Campaign Fund (EITC CF) was established in 2017 and focuses on supporting a year-long effort where a window of opportunity to promote or defend a state EITC seems urgent. Awards are made in the early Fall and range from $30,000-$50,000.
  - The EITC Policy Development Fund (EITC PDF) was established in 2015 and provides multi-year support to state-based policy groups laying the groundwork to develop or improve state EITCs in the South. Awards are made in the early Fall at $75,000 a year for two years.

The three funds are guided by an advisory group, supported by two national funders and administered by GIST and the EITC Funders Network in partnership with the Center on Budget and Policy Priorities (CBPP) and The Hatcher Group. In 2017, The Fund awarded $105,000 in Rapid Response Funds to three states (HI, MI, and MT), $150,000 in Campaign Funds to three states (MO, OK, WA), and $450,000 in Policy Development Funds to four states (AR, GA, VA, WV). New state EITCs were enacted in MT and HI. In PDF states important groundwork was laid — research to outline the issue and opportunity, and partnerships built to help garner support for a state EITC. National partners (CBPP and the Hatcher Group) provided TA to awardees and ensured tools and learning from The Fund were widely shared and leveraged across states. A retrospective evaluation of the Rapid Response Fund was completed, and an evaluation of the Policy Development Fund is underway. As a result of reflections from fund partners and evaluation findings to date, The Fund developed a separate Campaign Fund to support year-long efforts, is working with awardees sooner in the planning cycle to support tactics that require more in-depth planning and execution time and is working to provide greater transparency as to when funds are available. An interactive, online map illustrates the reach and outcomes The Fund and can be found at [http://gistfunders.org/EITCRapidResponseFund.php](http://gistfunders.org/EITCRapidResponseFund.php).

- **Funders Transition Strategy Room.** This working group was created in late 2016 with the goal of convening a small group of strategic, policy-focused funders to check in and compare notes about existing and new investments as well as policy and political intelligence across the various poverty and opportunity issues and sectors in response to the new policy environment. It is an invitation only working group with approximately 30 funders participating. In 2017, GIST staff facilitated two in-person meetings, three calls and a private
listserv. One new area of programming for GIST, implemented as part of the strategy room, were state deep dive discussions facilitated for the states of Maine, Ohio, North Carolina and Arizona. The purpose of the deep dive calls was to provide a platform for sharing about current strategies to build the capacity of policy, advocacy and engagement efforts in a specific state to address the federal policy debate in the areas of safety net, ACA/Medicaid, immigrant families and workers’ rights, identify areas of potential alignment across funders, and highlight needs and ways to strengthen the efforts of nonprofit policy, advocacy and engagement activities.

- **GIST Mapping Project.** Since 2011, GIST has been engaged in geographic mapping—looking at both where national partners are working in the states as well as, to a more limited degree, in funder investments. GIST developed an online, interactive mapping tool for funders that aims to help illustrate to funders where investments are being made in policy, advocacy and communications work in the states, and to help foster connections across these efforts. There are 39 national networks and 1,382 state policy and advocacy groups currently represented on the map. The data for this map and a companion analysis are updated annually in the first quarter of the year. GIST staff also developed new national network ecosystem maps to begin to explore how closely connected the national networks are in their work in the states. GIST staff are available to create custom maps for GIST donors on request. Three custom maps were developed for GIST donors in 2017. To access the mapping tool and companion analysis, visit [http://gistfunders.org/geographicmapping.php](http://gistfunders.org/geographicmapping.php). The national network ecosystem maps are not published on the web site but are available by request.

- **Budget Working Group.** The Budget Working Group is a joint affinity group effort formed in March 2016 that brings together funders from the Grantmakers Income Security Taskforce, Peace and Security Funders Group, and Funders’ Committee for Civic Participation’s Money in Politics Working Group who are interested in exploring the unequal dynamics of wealth, power and influence in America through the lens of the federal budget. The goal is to enrich grantmaking strategies and connect learning across grant-making silos by thinking more deeply together about how the projects our members fund intersects with discussions around spending priorities and the federal budget. After hosting several events in 2016, the working group was able to meet its primary goals, but had run its course as an active working group. A private listserv is maintained, and leadership remain ready to pick things up should there be interest or demand from members.

- **Communications Collaborative.** Established in 2009, the Communications Collaborative is a network of nearly 50 grantmakers representing national and regional foundations interested in coordinating investments to build communications capacity in the field. This working group now operates primarily as a listserv, as communications programming has been integrated into the GIST workplan, and for the GIST membership more broadly. This listserv remains active and is maintained by GIST staff. More than 600 messages were shared in 2017.
3. **Supporting strong leadership of GIST.** GIST staff facilitated monthly calls for Steering Committee members to plan GIST activities and an in-person meeting to review GIST programming, accomplishments, finances, and membership, as well as discuss goals and activities for the coming year. In 2017 Kit Judge, The Annie E. Casey Foundation joined the Steering Committee and Lynda Parmely, Hagedorn Foundation left the committee (Hagedorn closed its doors in late 2017). Current Steering Committee members include:

- Sandra Ambrozy, The Kresge Foundation
- Amy Brown, The Ford Foundation
- Kit Judge, The Annie E. Casey Foundation
- Michael Laracy, The Annie E. Casey Foundation
- Cassandra McKee, Wellspring Advisors
- Paula Sammons, W.K. Kellogg Foundation
- Robert Shull, The Public Welfare Foundation

4. **Maintaining and enhancing the GIST Web site and providing ongoing support to GIST members.** GIST staff regularly updated the announcements section on the GIST web site home page, and kept a running archive of meeting agendas, speaker presentations and meeting summaries from recent GIST events. In 2017 the GIST web site received 2,775 visitors (60% new and 40% returning) and approximately 11,760 page views. The top 5 most frequented pages of the web site were: GIST home page (2,933 page views), Budget and Tax Briefing page (1,329), Racial Equity Meeting pages (1,186 views), Events pages (764), and Geographic Mapping page (524). GIST staff also responded to requests for information and maintained a private listserv to facilitate information sharing.

5. **Collaborating with other grantmaker affinity groups.** Planning committees were formed for every event and engaged GIST members, funder colleagues and other affinity group leaders in the development of meeting agendas. Notably, nearly all events engaged one or more affinity groups. By jointly sponsoring events with partner affinity groups, GIST was able to leverage additional financial support and attract a larger and more diverse group of participants. GIST staff also regularly reached out to other affinity groups to publicize GIST meetings on their websites and newsletters. GIST staff worked closely with and built stronger relationships with several affinity groups in 2017, including the Early Childhood Funders’ Collaborative, Funders’ Committee for Civic Participation, EITC Funders Network, Funders for a Just Economy, Grantmakers Concerned with Immigrants and Refugees, and United Philanthropy Forum.

GIST uses the following logic model in to help guide its work. Our overall desired objective is to improve grantmaking and amplify impact. We assess this by evaluating the following set of outcomes.

- **Network staff is attuned to and shapes GIST activities tied to field-wide concerns and member needs:** GIST staff worked to align programming with member interests and concerns through the creation of planning committees for events and individual outreach to members and partners.

- **Grow GIST membership:** GIST continues to maintain an average of 250 members, with specific members fluctuating in and out depending on the alignment of GIST work with member
portfolios. Although membership has not grown much directly in numbers, new foundations participate in GIST every year and the loss of foundation representation has steadily declined.

- **Increase knowledge of issues and field trends:** High-profile grantmaker briefings and virtual webinars provide members with a wealth of information, resources, and ideas related to GIST’s priority issues. Evaluations indicate participants are satisfied with event agendas and content, and intend to incorporate the information they learned in their grantmaking.

- **Increased knowledge of GIST member grantmaking:** GIST developed an online, interactive mapping tool to help illustrate to funders where investments are being made in policy, advocacy and communications work in the states, and to help foster connections across these efforts. GIST staff also supported funder strategy sharing calls and meetings.

- **Provide opportunities to network and build relationships:** GIST provided in person and virtual opportunities for networking and relationship building and has steadily increased its programming over the past three years.

- **Provide opportunities to collaborate:** Working groups are formed where appropriate to support continued connections and discussions. GIST staff supported five working groups in 2017: The Communications Collaborative, EITC Rapid Response Fund, GIST Mapping Project, Budget Working Group, and Funders Transition Strategy Room.

- **Provide opportunities to discuss grantmaking opportunities, strategies and lessons learned:** Meetings are designed to include a mix of presentations and discussions with leading national thinkers, practitioners, and advocates as well as grantmaker updates and strategy sessions. Working groups are formed as needed to provide opportunities for continued connections and discussions.

- **Provide opportunities to see linkages across individual issues:** As part of the GIST staff “glue” function, staff keeps abreast of areas of interest and giving among members and make connections among grantmakers pursuing similar objectives or working in similar regions.

- **Share information and learnings with grantees:** The GIST mapping tool is updated annually, posted on the GIST web site and shared with funders as well as grantees represented on the maps. Where appropriate, webinars are also opened to select grantees at the discretion of GIST members.

Several important lessons have been learned in our administration of GIST this past year.

- **The importance of being flexible to adjust to new realities and help funders remain connected.** We have seen an increase in the demand for and value of our “glue” function as staff, to help members see linkages across individual issues and identify opportunities to collaborate. A new working group was formed in late 2016 – The Funder Strategy Room—to allow a small group of strategic, policy-focused funders to check in and compare notes about existing and new investments as well as policy and political intelligence across the various poverty and opportunity issues and sectors in response to the new political landscape. In 2017, GIST staff facilitated two in-person meetings, three calls and a private listserv, dedicating a
considerable amount of time and resources to this working group prioritized by GIST leadership. This nimbleness is critical to meeting the needs of the network and made possible because of GIST’s flexible structure (supported by general operating support grants and guided by a volunteer Steering Committee).

- **Bringing new voices to the table and growing the GIST network through the development of diverse planning committees and cosponsoring events with partner affinity groups.** This is a critical strategy that only seems to grow more important each year. Partnering with affinity groups can be time consuming, but we learn a lot from them and our work is stronger as a result. We will continue to leverage our membership with the United Philanthropy Forum to foster new and stronger collaborations with both national and regional philanthropy serving organizations.

- **The Annual Budget and Tax Briefing continues to be an anchor event for GIST,** now in its fifteenth year. Local viewing parties have been increasing in number and attendance since initiated in 2014 and offer a valuable way to expand participation and attract a larger and more diverse group of participants to the GIST network.

- **Providing opportunities for members to participate in different shapes and forms.** Listservs and webinars serve primarily as platforms for information sharing. In-person meetings remain critical for funder to funder networking and discussion and coordination as well as building trust and strong partnerships. Working groups provide opportunities for continued connections and conversations with like-minded funders. There is something for everyone, allowing members to participate at varying levels of engagement.

- **Understanding the importance of racial equity in our work.** GIST continues to seek opportunities to explore and discuss how racial equity work plays out in our institutions and our grantmaking. This year we dedicated our entire Fall meeting to this topic, experimenting with new session formats and strategies. The meeting was extremely well received, and we plan to continue to explore opportunities for embedding racial equity in our work.