



2018 Annual Report

Economic Opportunity Funders (formerly known as Grantmakers Income Security Taskforce) is an informal network of funders at the national, regional and local level working to advance economic equity and opportunity in the United States. We believe in building an economy that works for all, regardless of race, ethnicity, immigration status, education, income, religion, gender identity, disability or age. We support a strong public sector and policies that create a healthy, fair and just economy where opportunity and prosperity are broadly shared. Economic Opportunity Funders (EOF) focuses its work in three key and intersecting areas: poverty and opportunity, protecting and supporting workers, and tax and budget policies. We provide a platform for funders to share information, exchange ideas and best practice, and collaborate around identified areas of interest.

Through its work, EOF aims to:

- **CONVENE:** EOF brings funders together through in-person meetings and webinars to deepen their understanding of the cross-cutting issues of poverty and economic opportunity, support for low-wage workers, and adequate public resources.
- **CONNECT:** EOF makes connections among funders pursuing similar objectives or working in similar regions through outreach and mapping efforts.
- **CATALYZE:** EOF supports the coordination and alignment of investments through funder networks and pooled funds.
- **COLLABORATE:** EOF regularly partners with other funder affinity groups on programming to highlight the intersectionality of our work, improve our reach, impact, and effectiveness and to reduce duplication of efforts.

With guidance from our Steering Committee, we launched a new name and website on November 28, 2018 to better articulate who we are, what we stand for, and what we do.

- New name: Economic Opportunity Funders (EOF)
- New tagline: Advancing effective government and equitable policies for shared prosperity.
- New website: www.eofnetwork.org

In 2018, EOF sponsored or cosponsored 38 events and supported two funder networks. Participation in EOF remained strong with 264 funders participating in the EOF network. EOF gained 36 new members in 2018, including representation from 13 new foundations or affinity group partners. EOF staff worked

closely with the Steering Committee to plan and carry out several successful events that advanced EOF goals. Major activities and accomplishments are outlined below.

- 1. Planning and coordinating in-person and virtual EOF meetings and events.** EOF held five meetings and four webinars (where EOF staff had primary role in planning and implementation), reaching 500 funders. Planning committees were formed for every event and engaged EOF members, funder colleagues and other affinity group leaders in the development of meeting agendas.

Date	Event	Participants
Mar 2018	EOF Meeting: 15th Annual Budget and Tax Briefing	47
Mar 2018	EOF Meeting: Funder Strategy Room Working Group	25
Jul 2018	Cosponsored Webinar: Immigration Funder Strategy Discussion	64
Sept 2018	Cosponsored Meeting: Prosperity Summit Session: Advancing Race, Ethnic and Gender Equity Through the Tax Code - Tax Credits and Beyond	71
Oct 2018	Cosponsored Webinar: Make the Census Count for Young Children: A Funder Strategy Conversation	45
Oct 2018	Cosponsored Webinar: Understanding the EITC's Impact on a Community Level: A Sneak Peek at the New and Improved EITC Interactive Data Tool	51
Nov 2018	Cosponsored Meeting: 2018 Post-Election Briefing: Philanthropy at the Crossroads	130
Nov 2018	EOF Meeting: The Future of Economic Security: A Funder Discussion on Proactive Opportunities	27
Dec 2018	Cosponsored Webinar: Creating Impact in the South: The EITC Policy Development Fund	40
TOTAL		500

See a detailed description of each event below.

- March 22, 2018 - 15th Annual Budget and Tax Briefing:** EOF hosts an annual Budget and Tax Briefing to provide funders and philanthropic advisors with a unique opportunity to learn about and discuss 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. Forty-six funders registered for this event. An additional 47 funders viewed the keynote presentation via web stream and local funder viewing parties were held in eight cities – Baltimore, Buffalo, Chicago, Cleveland, Philadelphia, Pittsburgh, Providence, and St. Louis.
- March 23, 2018 – Funder Strategy Room Meeting.** This invitation only meeting was hosted by Economic Opportunity Funders and provided participants with an opportunity to learn about funder investments responding to this year’s threats to the safety net at the federal level and opportunities for building power in the states. Twenty-five funders registered for this event.

- **July 13, 2018 - Immigration Funder Strategy Discussion:** This webinar was sponsored by Children, Youth & Family Funders Roundtable, Early Childhood Funders Collaborative, Economic Opportunity Funders and Grantmakers Concerned with Immigrants and Refugees. The webinar explored the ways in which our foundation portfolios are evolving to explore the intersect of specific topics and the changing landscape for immigrant families. Sixty-four funders registered for this webinar.
- **September 6, 2018 - Prosperity Summit Session: Advancing Race, Ethnic and Gender Equity Through the Tax Code - Tax Credits and Beyond.** This meeting was hosted by Economic Opportunity Funders, EITC Funders Network, Asset Funders Network, Closing the Women's Wealth Gap Initiative, Grantmakers Concerned with Immigrants and Refugees, and the Philanthropic Initiative for Racial Equity. Seventy-one funders registered for this event.
- **October 8, 2018 - Make the Census Count for Young Children: A Funder Strategy Conversation.** This webinar was sponsored by the Children, Youth & Family Funders Roundtable, Economic Opportunity Funders, Early Childhood Funders Collaborative, and Funders' Committee for Civic Participation. This funder-only strategy conversation explored how the Census affects children, families, and communities and what you can do to make sure every child is accurately counted. Forty-five funders registered for this event.
- **October 23, 2018 - Understanding the EITC's Impact on a Community Level: A Sneak Peek at the New and Improved EITC Interactive Data Tool.** This webinar was sponsored by Economic Opportunity Funders and the EITC Funders Network. The webinar provided a demonstration of the newly updated Earned Income Tax Credit Interactive tool, housed at the Urban-Brookings Tax Policy Center (TPC). Fifty-one funders registered for this event.
- **November 27, 2018 – 2018 Post-Election Briefing: Philanthropy at the Crossroads.** This meeting explored the 2018 American electorate, how election outcomes will impact opportunities and challenges facing families, workers and communities across the nation, and what the results mean for our work as funders. The meeting was hosted by Economic Opportunity Funders in partnership with Asset Funders Network, Early Childhood Funders Collaborative, Funders' Committee for Civic Participation, Funders for a Just Economy and Grantmakers Concerned with Immigrants and Refugees. One hundred thirty funders registered for this event.
- **November 27, 2018 - The Future of Economic Security: A Funder Discussion on Proactive Opportunities.** This invitation-only dinner program was hosted by Economic Opportunity Funders and provided an opportunity for funders with a focus on improving the economic well-being of low-income workers and families to learn about each other's aspirations, agendas, approaches, and shared questions and challenges, as well as explore potential areas of alignment and partnership. Twenty-seven funders registered for this event.
- **December 6, 2018 - Creating Impact in the South: The EITC Policy Development Fund.** This webinar provided an opportunity to learn about the EITC Policy Development Fund, hear lessons learned from funders and awardees about how their efforts to expand access to state EITCs has transformed their ability to engage new allies in the effort to reduce poverty, and talk together about ways to apply these learnings to other topical areas or efforts in additional Southern states. The webinar was sponsored by Economic Opportunity Funders, the EITC Funders Network and Southeastern Council on Foundations. Approximately forty funders registered for this event.

EOF also cosponsored 29 webinars led by partner affinity groups (where EOF staff had a primary promotion role).

- **Cosponsored ten GCIR Monthly Immigration Policy Calls** to provide updates on timely policy issues affecting immigrants and refugees-and explore issues that are particularly relevant or pressing for philanthropy.
- **Cosponsored nine FCCP 2018 First Monday + Election Series webinars** to discuss key issues facing the 2018 Elections together.
- **Cosponsored four webinars as part of the FCI Briefing Series: Census 2020 Messaging Testing Results** to share key findings from get-out-the-count messaging research to identify messages that resonate with hard-to-count communities.
- **Cosponsored six webinars with FCCP** on various topics including the Census, Redistricting and Money in Politics.

2. Planning and coordinating special projects and funder networks. EOF staff supported two special projects (EITC Pooled Fund, EOF Mapping Project) and three funder networks (Communications Collaborative and Budget Working Group listserv and Funder Strategy Room Working Group).

- **EITC Pooled Fund.** To help improve the efforts to protect current and create new state EITCs, EOF and the EITC Funders Network administer and oversee The EITC Rapid Response, Campaign and Policy Development Fund. The three funds are guided by an advisory group, supported by two national funders and administered by EOF and the EITC Funders Network in partnership with the Center on Budget and Policy Priorities and the Hatcher Group. In 2018, The Fund awarded \$120,000 in Rapid Response Funds to four states (MA, ME, MT, UT) and \$50,000 in Campaign Funds to one state (OR). The Fund also continued to oversee 2017/2018 Campaign Fund awards in MO, OK, WA and Policy Development Fund awards in AR, GA, VA, WV. A retrospective evaluation of the Policy Development Fund was completed; key findings from the evaluation can be found here: <https://eofnetwork.org/state-eitc-policy-development-fund-evaluation-outcomes-and-lessons-learned/>. National partners (Center on Budget and Policy Priorities and the Hatcher Group) provided TA to awardees and ensured tools and learnings from The Fund were widely shared and leveraged across states. The Fund also supported an update of an EITC Interactive tool which provides users with access to IRS data on federal individual income tax filers. Information on filers who claim the EITC is available for all ZIP codes, cities, counties, metropolitan areas, states, state legislative districts, and Congressional districts in the United States. A webinar was held in October 2018 to provide a demonstration of the tool.
- **EOF Mapping Project.** Since 2011, EOF 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. EOF has 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 44 national networks and 1,361 state policy and advocacy groups currently represented on the map. The data for this map and a companion analysis is updated annually in the first quarter of the year. To access this tool, visit <https://eofnetwork.org/project/mapping/>. EOF staff also created three custom state ecosystem maps for EOF donors on request (LA, NC, TX).

- **Funders 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, EOF Staff facilitated three in-person meetings, six teleconferences, a private listserv and state deep dive discussions focused on four key topics: ACA/Medicaid, workers' rights, safety net, and immigrant families. In 2018, EOF staff facilitated one in-person meeting. This invitation-only working group is no longer active, but EOF hopes to convene a funder strategy working group, open to all interested EOF members, after the mid-term elections in 2018.
- **Communications Collaborative Listserv.** Established in 2009, the Communications Collaborative was formed to bring together funders interested in coordinating investments to build communications capacity in the field, with a focus on the essential role of government and advancing the alignment of national narratives. Activities included in-person meetings, webinars, a private listserv, and making connections among members pursuing similar objectives or working in similar regions. Two special projects emerged from this work, the EITC Pooled Fund and Mapping Project. This working group is no longer active, with key activities ending in 2015, but EOF staff continue to maintain an active listserv. In 2018 a total of 499 announcements/articles were shared. In 2019, we plan to rebrand this to an "In the News" listserv to better reflect its content and purpose (no longer solely focused on communications).
- **Budget Working Group Listserv.** The Budget Working Group was a joint affinity group effort formed in early 2016 to bring together funders from Economic Opportunity Funders, 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. 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 to support continued connections and information sharing. We anticipate closing this listserv at the end of 2018 due to limited activity.

3. Supporting strong leadership of EOF. EOF staff facilitated monthly calls for Steering Committee members to plan EOF activities and one in-person Steering Committee meeting to review EOF activities and accomplishments, finances, and membership, as well as discuss goals and activities for the coming year. Several membership changes occurred in 2018. Kit Judge, The Annie E. Casey Foundation, joined the steering committee to facilitate the transition after Mike Laracy's retirement. Mike Laracy continues to sit on the steering committee as he transitioned from Director of Policy Reform and Advocacy to the role of part-time senior fellow in August 2018. Ria Pugeda, Consumer Health Foundation joined the steering committee. Marissa Guananja, W.K. Kellogg Foundation replaced Paula Sammons, W.K. Kellogg Foundation, who has been temporarily assigned to do some

focused employment equity work in MS/NOLA. Anna Wadia, Ford Foundation, replaced Amy Brown, Ford Foundation whose tenure at Ford finished at the end of 2018. Current Steering Committee members include:

- Sandra Ambrozy, The Kresge Foundation
- Marissa Guananja, W.K. Kellogg Foundation
- Kit Judge, The Annie E. Casey Foundation
- Michael Laracy, The Annie E. Casey Foundation
- Cassandra McKee, Wellspring Philanthropic Fund
- Ria Pugeda, Consumer Health Foundation
- Robert Shull, The Public Welfare Foundation
- Anna Wadia, The Ford Foundation

EOF staff will continue to explore ways to support and diversify its leadership.

- 4. Maintaining and enhancing the EOF website and providing ongoing support to EOF members.** EOF staff regularly updated the announcements section on the EOF website home page, and kept a running archive of meeting agendas, speaker presentations and meeting summaries from recent EOF events. In 2018, the EOF website received 3,158 visitors (15% new and 85% returning) and approximately 14,600 page views. The top most frequented pages of the website were: EOF home page (3,115 page views), Post-Election Briefing pages (1,714 page views), Budget and Tax Briefing pages (1,631 page views), Events pages (634 page views), Geographic Mapping page (577 page views) and EITC Fund page (462 page views). EOF staff also conducted a major overhaul of the website, updating the platform technology as well as revamping the entire structure, layout and content of the website to better articulate our work and value as a network. EOF staff also responded to requests for information and maintained a private listserv to facilitate information sharing among members.
- 5. Continue to strengthen EOF membership through strategic outreach.** An analysis of our membership is conducted on an annual basis for review and discussion among the Steering Committee. The analysis is used to inform targeted outreach to colleagues who might be interested in participating in EOF. Planning committees were formed for every event and engaged EOF 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, EOF was able to leverage additional financial support and attract a larger and more diverse group of participants. EOF staff also regularly reached out to other affinity groups to publicize EOF meetings on their websites and newsletters. EOF staff worked closely with and built stronger relationships with several affinity groups in 2018, including Asset Funders Network, Children Youth & Family Funders Roundtable, Funders' Committee for Civic Participation, EITC Funders Network, Funders for a Just Economy, United Philanthropy Forum, and Workforce Matters.