



2019 Annual Report

Economic Opportunity Funders 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.

In 2019, EOF sponsored or cosponsored 38 events, supported two funder networks, managed the EITC Pooled Fund and updated our online mapping tool. Participation in EOF remained strong with 275 funders participating in the EOF network. EOF gained 46 new members in 2019, including representation from 21 new foundations. 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 two meetings and cosponsored 9 webinars where EOF staff had a primary role in planning and implementation, reaching more than 400 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	Registrants
Jan 2019	Webinar: Looking Ahead to 2019: Policy Opportunities for Children and Families	35
Feb 2019	Meeting: Budget Policy Briefing	72
	Meeting: Budget Policy Briefing Livestream Viewers	39
	Meeting: Budget Policy Briefing Watch Parties	100
May 2019	Webinar: Making a Big Difference for Children and Communities: A funder conversation about advocacy and systems change strategies	45
Jun 2019	Webinar: Employment, Paid Leave and Portable Benefits: Meeting the Needs of Non-Standard Workers in the New Economy	24
Nov 2019	Meeting: Equity and the Future of Work, Workers and Social Supports	54
	Six Working Group Video Calls in 2019	45
TOTAL		414

See a detailed description of each event below.

- January 29, 2019 - Looking Ahead to 2019: Policy Opportunities for Children and Families:** This webinar was hosted by the Children, Youth & Family Funders Roundtable and cosponsored by Economic Opportunity Funders, Women’s Funding Network, and Workforce Matters. The webinar explored how the 2018 election results will bring change, new opportunities, and different challenges to the policy landscape at both the national and state levels, the potential impacts on children and the varieties of roles funders can play to advance, defend against, or communicate better about policy. Thirty-five funders registered for this event.
- February 21-22 – Budget and Policy 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. In 2019, EOF partnered with Funders for a Just Economy to hold a joint Budget Policy Briefing to streamline programming, highlight intersections, eliminate duplication, reduce travel burdens on membership, and economize on meeting expenditures. This two day meeting updated philanthropy about our current understanding of the major forces that will impact worker

- justice, social protections, and equitable economic policy in the coming years, shed light on offensive and defensive needs on federal, state and local levels, and identified how funders can best support these initiatives. Sixty-three funders registered for the briefing (including representatives from seven partner affinity groups). An additional 39 funders viewed the keynote presentation on the federal budget and tax outlook via web stream and local viewing parties were held in ten cities – Baltimore, Buffalo, Chicago, Cleveland, Orlando, Pittsburgh, Providence, Raleigh, Seattle, and St. Louis – reaching an additional 100 funders.
- **May 23, 2019 - Making a Big Difference for Children and Communities:** This webinar was hosted by the Children, Youth & Family Funders Roundtable and cosponsored by Early Childhood Funders Collaborative, Economic Opportunity Funders, Funders’ Committee for Civic Participation, Funders Together to End Homelessness, Grantmakers Concerned with Immigrants and Refugees, Women’s Funding Network, Workforce Matters. This webinar explored a range of advocacy and systems change strategies used to ensure more children, families and communities can thrive. Forty-five funders registered for this webinar.
 - **June 25, 2019 - Employment, Paid Leave and Portable Benefits: Meeting the Needs of Non-Standard Workers in the New Economy Webinar:** This webinar was sponsored by Economic Opportunity Funders and Funders for a Just Economy to provide funders with the opportunity to learn about portable benefits and paid leave policies that meet the needs of non-standard workers well as a campaign to build better supports for workers in Massachusetts and other states. Twenty-four funders registered for this event.
 - **November 5-6, 2019 - Equity and the Future of Work, Workers and Social Supports:** This two-day EOF meeting explored the role of equity in the transformation of work, workers and social supports and how we ensure that inequities are disrupted and not reinforced and create a more vibrant and just economy. Fifty funders registered for this event.
 - **Working Group Video Calls.** Three video calls were held for the transformation of work, workers and social supports working group to raise awareness of the substantive areas and funder strategies connected to policy, narrative, and power. Twenty-three funders participated in this working group. Three video calls were held for the discussion group on equity, tax policy and community engagement to help members explore strategies, questions and learnings related to equity and tax policy, the ways in which tax policy and equity-focused community engagement efforts are intersecting, and gaps and opportunities. Twenty-two funders participated in this working group.

EOF also cosponsored 27 webinars led by partner affinity groups (where EOF staff had a primary promotion role).

- **Cosponsored nine 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 three Funders’ Committee for Civic Participation (FCCP) First Monday + Election Series webinars** to discuss key issues facing the 2018 and 2020 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 ten webinars with FCCP** on various topics including the census, civic engagement, democracy reform, money in politics and racial equity and power sharing.
- **Cosponsored one webinar with Workforce Matters** on racial differences on the future of work

2. Planning and coordinating special projects and funder networks. EOF staff supported two special projects (EITC Pooled Fund, EOF Mapping Project) and two funder networks (Equity, Tax Policy and Community Engagement and the Transformation of Work, Workers and Social Supports).

- **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. The three funds are guided by an advisory group, supported by three 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 2019, The Fund awarded \$244,500 in Rapid Response Funds to ten states (CA, HI, ME, MO, NM, NY, RI, UT, WA WI), \$230,000 in Campaign Funds to five states (GA, NJ, OK, OR, WV), \$150,000 in Policy Development Funds to two states (AR, VA) and \$75,000 in Policy Development Planning Funds to three states (ID, FL, PA). National partners (CBPP and the Hatcher Group) provided TA to awardees and ensured tools and learnings from The Fund were widely shared and leveraged across states. An interactive, online map illustrates the reach and outcomes of the RRF and PDF and can be found at <http://EOFfunders.org/EITCRapidResponseFund.php>. 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.
- **Discussion Group on Equity, Tax Policy and Community Engagement.** In 2017 and 2018, EOF and the EITC Funders Network engaged their members in conversations about the role of tax policy in advancing racial and gender equity. As part of these discussions, we found that too often the foundations working on equity and the foundations working on tax policy were not in the same rooms sharing analyses and strategies. In 2019, EOF and the EITC Funders Network launched a discussion group to provide a platform for funders to share strategies, questions and learnings around the following set of questions.
 - How are tax policy groups applying a racial and gender equity lens in the analysis of tax policy?

- What are best practices of community engagement groups working at the intersect of economic justice, equity and tax policy?
- What is the current relationship between tax policy groups and community-based organizations? What lessons can be learned about these partnerships? What can be done to create greater linkages among these efforts?
- What are the gaps in our knowledge or practice that would help the field become stronger and more effective?

A google drive and listserv were created to support the working group as well as spreadsheet of related field examples and resources. Three video calls were held. We will explore next steps for this working group in early 2020.

- **Transformation of Work, Workers and Social Supports Working Group.** Continuing to build out our exploration of the interconnecting spheres of the transformation of work, workers and social supports, EOF launched a working group in 2019 to raise awareness of the substantive areas and funder strategies connected to policy, narrative, and power. EOF hosted three working group video calls to raise awareness of the substantive areas and funder strategies connected to policy, narrative, and power. The goals of the working group include:

- Increased understanding of how funders are defining and engaging in work related to the transformation of work, workers and social supports, especially as these transformations impact low-income and communities of color.
- Increased understanding of key funder strategies of policy development and dissemination, power, and narrative change.
- Exploration of opportunities funders have to work in aligned ways across substantive divides and within key strategies. and dedicated its Fall meeting to exploring the role of equity in the transformation of work, workers and social supports.

A google drive and listserv were created to support the working group as well as spreadsheet of related field examples and resources. Three video calls have been held and EOF dedicated its Fall meeting on bringing an equity lens to this topic. Next steps for this working group will be assessed in early 2020.

- **EOF Mapping Project.** Since 2012, EOF has maintained an online 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. While mapping continues to be of interest to EOF participants and collaborators, we have yet to really see broad use of our online tool and maps. After careful consideration and review of available data on the use of the mapping tool (including a member survey in 2019), the EOF Steering Committee agreed to discontinue the tool and explore other opportunities to support the mapping interests of our membership. This could include in-person mapping exercises or state deep dive discussions at meetings and a potential partnership with the Foundation Center to map funders investments in economic opportunity. It was noted that after the 2020 elections, there may be renewed interest from

our membership in the mapping tool and we remain open to relaunching the tool in late 2020/early 2021 if needed.

3. Supporting strong leadership of EOF. EOF staff facilitated monthly calls for Steering Committee members to plan EOF activities and two in-person Steering Committee meetings to review EOF activities and accomplishments, finances, and membership, as well as discuss programmatic goals and activities. EOF Steering Committee member, Bob Shull, left the Public Welfare Foundation and EOF Steering Committee in September 2019 due to strategic changes at the Foundation that resulted in the elimination of their portfolio on low-wage workers and workers' rights. Current Steering Committee members include:

- Erin Currier, W.K. Kellogg Foundation
- Stephanie Davison, The Kresge Foundation
- Kit Judge, The Annie E. Casey Foundation
- Cassandra McKee, Wellspring Philanthropic Fund
- Ria Pugeda, Consumer Health 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, and kept a running archive of meeting agendas, speaker presentations and meeting summaries from recent EOF events. EOF launched a new name and website in November 2018 to better articulate who we are, what we stand for, and what we do. In 2019, the EOF website received 3592 visitors (87% new and 14% returning) and 10,963 page views. The top five most frequented pages of the website were: EOF home page (2428 views), Annual Budget and Tax Briefing (860 views) EOF Fall meeting (666 views), EITC Pooled Fund (397 views) and EOF member registration page (345 views). 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. EOF staff responded to requests for information and published three Q&A interviews to facilitate information sharing and collaboration among EOF members. EOF also engaged in targeted outreach to members and funder colleagues to keep abreast of investment priorities and interests and to engage new funders in the EOF network. Outreach efforts are informed by an annual membership analysis that identifies new members, a list of "frequent flyers" (members who have participated in multiple meetings and events); and a review of member and foundation representation attrition over the past year. In addition, 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 2019, including Children Youth & Family Funders Roundtable, Early Childhood Funders Collaborative, EITC Funders Network, Funders' Committee for Civic Participation, Funders for a Just Economy, Grantmakers Concerned with Immigrants and Refugees, United Philanthropy Forum, and Workforce Matters. EOF also conducted a member-wide, anonymous survey in 2019 to gather data on network value and participation as well as specific feedback on our mapping tool and programming. The survey was shared with 213 members (philanthropy serving organization members were not included); 37 members completed the survey. Key findings include:

- As expected, respondents are most familiar with EOF meetings and least familiar with EOF special projects, including the EITC Pooled Fund and Mapping Tool. We should explore opportunities to continue to raise awareness of our special projects among members.
- Survey findings reinforced our recent practice of offering 1-1.5-day meetings and incorporating action-oriented strategy sessions into meetings.
- While programming to date has been offered free of charge, members seem amenable to a nominal registration fee to help cover meeting expenses.
- While mapping continues to be of interest to EOF participants and collaborators, we have yet to really see broad use of our online tool and maps. We should consider other opportunities to support the mapping interests of our membership.
- We should explore opportunities to continue to raise awareness of our special projects among members.