



17th Annual Budget and Tax Briefing

March 5-6, 2020

FHI 360, 1825 Connecticut Ave NW, 8th Floor, Washington, DC 20009

AGENDA

THURSDAY, MARCH 5, 2020

11:30-12:30pm

Welcome and Opening Luncheon

- **Kit Judge**, Associate Director, Policy Reform and Advocacy, The Annie E. Casey Foundation

12:30-1:45pm

Federal and State Budget and Tax Policy Outlook

Learn about key battles and opportunities and what's at stake and in play in 2020.

- **Jean Ross**, Senior Program Officer, The Bernard and Anne Spitzer Charitable Trust (moderator)
- **Sharon Parrott**, Senior Vice President for Federal Policy and Program Development, Center on Budget and Policy Priorities
- **Erica Williams**, Senior Director of State Policy Initiatives, Center on Budget and Policy Priorities

This session will be livestreamed and recorded for local funder watch parties across the country as well as individual funder viewers.

1:45-2:00pm

Break

2:00-3:00pm

Public Benefits Innovations and Evolution

Stronger policies and social supports are needed in this rapidly changing economy to boost wages, modernize benefits, and ensure all Americans have access to food, housing, education, healthcare, and other basic needs. Public benefits must be inclusive and provide coverage for all workers in all forms of employment, including unpaid caregivers and contract workers. Hear from field experts about community- and worker-led solutions for building a new social contract that is equitable and advances a just democracy and economy.

- **Anna Wadia**, Senior Program Officer, Future of Work(ers), Ford Foundation (moderator)
- **Catherine Albisa**, Executive Director, Partners for Dignity & Rights
- **Rebecca Dixon**, Executive Director, National Employment Law Project

3:00-3:30pm

Break

3:30-5:30pm

Building Equity into the Tax Code

Learn about the historic and current connection between tax systems and racial and gender equity, how the fields of policy and community engagement have been working to address equity through changing the tax code and how we talk about taxes, and how funders can best support these initiatives.

Part I: Field Panel Discussion (3:30-4:45pm)

- **Jeremie Greer**, Co-Founder and Co-Executive Director, Liberation in a Generation (moderator)
- **Melissa Boteach**, Vice President for Income Security and Child Care/Early Learning, National Women's Law Center
- **Michael Linden**, Executive Director, Groundwork Collaborative

Part II: Funder-Led Table Discussions (4:45-5:30pm)

Participants will break into three groups. Funder discussion leaders will kick off the conversation by sharing how they are thinking about and approaching this work and facilitate small group discussions.

1. **Community Engagement:** **Pierre Joseph**, Program Officer, Solidago Foundation
2. **Narrative:** **Jace Woodrum**, Senior Officer of Public Opinion Insights, The Colorado Health Foundation
3. **Policy:** **Danielle Goonan**, Director, Economic Policy Investments and Grantmaking, Equity & Economic Opportunity (USA), The Rockefeller Foundation

5:30pm

Closing and Adjourn

- **Jason Cone**, Chief Public Policy Officer, Robin Hood

5:30-7:00pm

Reception at FHI 360

Participants are invited to stay for an informal reception to network and socialize. Drinks and light hors d'oeuvres will be served.

FRIDAY, MARCH 6, 2020

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| 8:30-9:00am | Breakfast |
| 9:00-9:30am | Welcome and Reflections <ul style="list-style-type: none">• Pierre Joseph, Program Officer, Solidago Foundation |
| 9:30-10:15am | Building an Inclusive Economy and Democracy: Policy and Practice <p>How do we ensure everyone has a voice in our democracy and economy and move toward full and meaningful participation and representation?</p> <ul style="list-style-type: none">• LaTosha Brown, Co-Founder, Black Voters Matter and Black Voters Matter Capacity Building Institute |
| 10:15-10:45am | Break |
| 10:45-12:00pm | Key Policy Debates as We Head into the 2020 Elections <p>What are the presidential candidates' key policy platforms on the economy, taxes, healthcare, and immigration? What issues are mobilizing voters and building public and political will to advance effective government, equitable policies, and shared prosperity?</p> <ul style="list-style-type: none">• Marcia Egbert, Senior Program Officer, Human Services, The George Gund Foundation (moderator)• Ramesh Ponnuru, Senior Editor for the National Review, Columnist for Bloomberg Opinion, Visiting Fellow at the American Enterprise Institute, and a Senior Fellow at the National Review Institute• Mark Schmitt, Director, Political Reform Program, New America |
| 12:00-2:00pm | Working Lunch: Responding to Attacks on Healthcare and Immigration <p>Hear from organizers and advocates on how they are addressing some of our nation's leading challenges on healthcare and immigration.</p> <ul style="list-style-type: none">• Cassandra McKee, Interim Program Director, Children's Economic Security Program, Wellspring Philanthropic Fund (moderator)• Marielena Hincapié, Executive Director, National Immigration Law Center• Emily Stewart, Executive Director, Community Catalyst |
| 2:00pm | Adjourn |

2020 Virtual Watch Party Hosts

We are thrilled to expand our reach of the Budget and Tax Briefing to virtual watch parties in seven cities, including:

Buffalo, NY | Chicago, IL | Cleveland, OH

Providence, RI | Raleigh, NC | Rochester, NY | St. Louis, MO

The George Gund Foundation



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Jason Cone, Robin Hood
Marcia Egbert, The George Gund Foundation
Pierre Joseph, Solidago Foundation
Kit Judge, The Annie E. Casey Foundation
Jean Ross, The Bernard and Anne Spitzer Charitable Trust

Many thanks to FHI 360 for providing the space!