



2023 BUDGET AND TAX BRIEFING

— ECONOMIC OPPORTUNITY FUNDERS —

April 20, 2023 | 9:00-5:30 PM

Convene | Colonial Hub Room, 29th Floor | 1201 Wilson Blvd., Arlington, VA 22209

Goals:

- Support networking and relationship building.
- Gain a better understanding of narrative and communication strategies that are building public support for government and taxes, what's at stake and in play at the federal and state levels, coordinated efforts working to shape the budget and tax fights ahead, and implications for philanthropy in the short and long term.
- Recognize the EOF 2023 Law & Social Policy Legacy Award winner.

Agenda:

9:00 AM	Breakfast and Registration
9:30 AM	Welcome and Introductions <ul style="list-style-type: none">• Anna Wadia, Executive Director, CARE Fund and EOF Steering Committee Member
10:00 AM	Table Discussions <p>We'll spend some time connecting as a community of funders and getting to know one another.</p>
10:20 AM	Transition Break
10:30 AM	Making the Case for Government and Taxes <p>This session will explore narrative and communications initiatives working to build public support for a government for the people and by the people, equitable tax reform, and increases to revenue streams to ensure an economy that works for all, regardless of race, ethnicity, immigration status, education, income, religion, gender identity, disability, or age.</p> <ul style="list-style-type: none">• Tracy Williams, Director, Reimagining Capitalism, Omidyar Network (moderator)• Anika Fassia, co-founding Co-Executive Director, We Make the Future and We Make the Future Action• Elaine Mejia, Senior Impact Strategist, Vice President of Field Building, Topos Partnership

<p>11:30 AM</p>	<p>Celebrating Our 2023 Law & Social Policy Legacy Award Winner New Mexico Center on Law and Poverty (NMCLP) is the recipient of EOF’s 2023 Law & Social Policy Legacy Award. For over 25 years, NMCLP has worked directly with workers and community groups to build a powerful, collaborative movement for lasting change. In the process, it has notched historic victories that helped extend basic rights to farm workers, improve enforcement of wage theft laws, and usher in the state’s first statewide paid sick leave law.</p> <ul style="list-style-type: none"> • Sireesha Manne, Executive Director, New Mexico Center on Law and Poverty
<p>11:45 AM</p>	<p>Lunch</p>
<p>12:45 PM</p>	<p>Federal Budget and Tax Outlook Noted tax and budget policy expert Sharon Parrott will provide an overview of key provisions in the federal budget, discuss current and upcoming budget debates, and offer insights on the potential impact on struggling families, workers, and communities.</p> <ul style="list-style-type: none"> • Shana Bartley, Policy Officer, W.K. Kellogg Foundation (moderator) • Sharon Parrott, President, Center on Budget and Policy Priorities
<p>1:30 PM</p>	<p>Transition Break</p>
<p>1:45 PM</p>	<p>State Budget and Tax Outlook Learn about recent trends, key battles and opportunities, and what’s at stake and in play in 2023. Panelists will also share lessons learned from recent revenue campaign wins in Massachusetts and New Mexico.</p> <ul style="list-style-type: none"> • Michael Cassidy, Director, Policy Reform, and Advocacy, The Annie E. Casey Foundation (moderator) • Jeron Mariani, Senior Program Director, State Revenue Alliance • Miles Tokunow, Deputy Director, OLÉ
<p>2:45 PM</p>	<p>Reflections and Lingering Questions Participants will share ideas that have resonated, or questions raised.</p>
<p>3:00 PM</p>	<p>Break</p>
<p>3:30 PM</p>	<p>Working Together to Shape Upcoming Budget and Tax Debates Over the next several years, trillions of dollars in tax cuts are set to expire, more than \$25 billion remains to be spent in federal recovery dollars, and federal recovery investments in education, health, and child care will end. Learn more about two initiatives underway working to coordinate efforts at the federal and state level and prepare for the budget and tax fights ahead.</p> <ul style="list-style-type: none"> • Meg Fosque, Program Officer, Economic Policy Investments and Grantmaking, Equity & Economic Opportunity, The Rockefeller Foundation (moderator) • Erica Clemmons Dean, Director of Advocacy and Programs, Family Values @ Work • Charles Khan, Lead, Tax & Wall St. Campaigns, Center for Popular Democracy • Amy K. Matsui, Director of Income Security and Senior Counsel, National Women’s Law Center
<p>4:30 PM</p>	<p>Reception</p>
<p>5:30 PM</p>	<p>Adjourn</p>