

EITC Funders Network 2022 Year in Review

OVERVIEW

The EITC Funders Network aims to provide support and information to funders related to the EITC and other tax credits for struggling workers and families by staying abreast of and identifying field-wide concerns and providing a platform for discussion and exchange in order to help funders shape the field according to emerging best practices.

Steering Committee

Network staff works closely with EITC Funders Network Steering Committee members to identify critical issues in the field and programmatic opportunities for the Network.

The 2022 EITC Funders Network was guided by a Steering Committee comprised of:

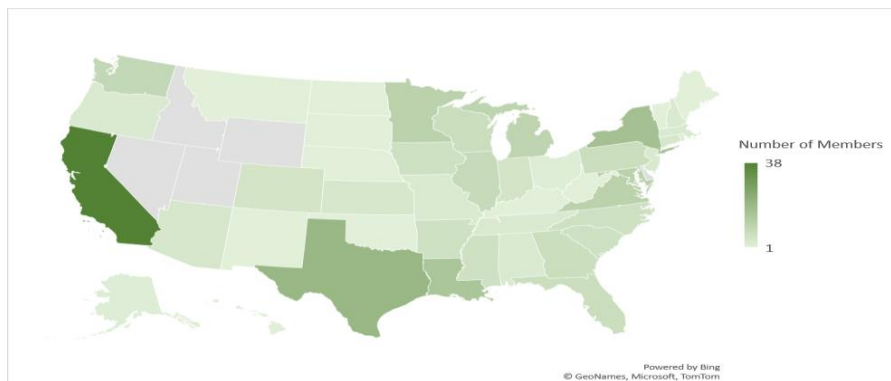
- Isabel Barrios, Greater New Orleans Foundation
- Erin Currier, W.K. Kellogg Foundation
- Danielle Goonan, The Rockefeller Foundation
- Leslie Moore, The Annie E. Casey Foundation
- Melanie Styles, The Abell Foundation
- Lisa Urias, Arizona Community Foundation

Membership

Throughout 2022, we added a total of 19 new members through a combination of membership requests and in-person outreach. At the end of the year, the EITC Funders Network membership number stood at 298.

We currently have members in 46 of the 50 states and the District of Columbia - all states except Delaware, Idaho, Utah and Wyoming. We continue to see the highest number of members in California, New York, and Texas. See the map below for membership distribution by state.

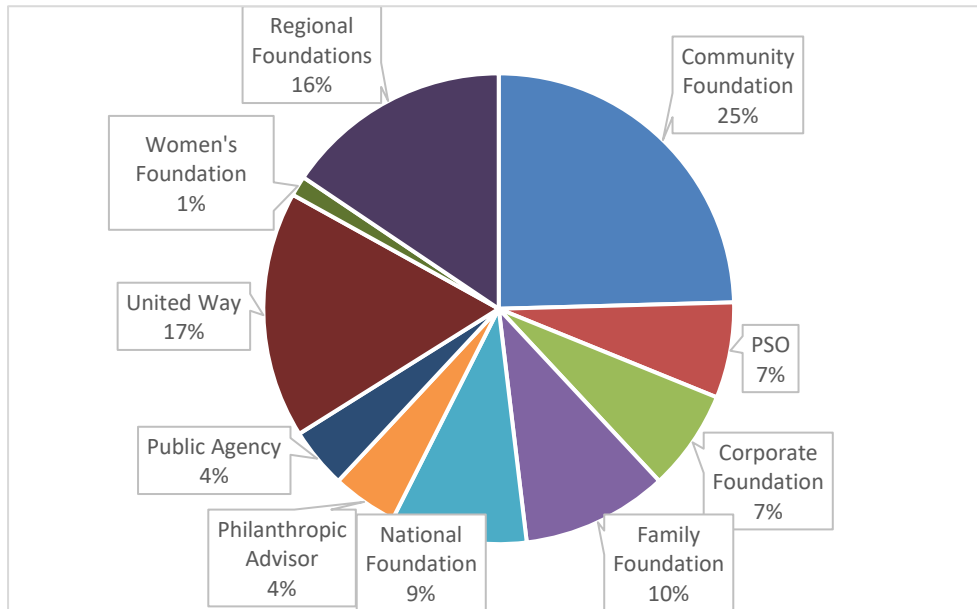
2022 EITC Funders Network Membership by State



Source: Constant Contact membership report, 1/4/2023. Note that this number refers to members, not organizations – in some cases, we have multiple members representing the same organization, though this distribution does provide a rough geographical overview.

Members represent a wide range of philanthropic entities, with the largest numbers of members representing Community Foundations (25 percent); United Ways (17 percent); Regional Foundations (16 percent); Family Foundations (10 percent); and, National Foundations (9 percent); These percentages refer to individual members, not organizations, though they do provide a rough estimate of organizational representation.

2022 EITC Funders Network Membership by Type of Organization



Source: Constant Contact membership report, 1/04/2023.

Membership engagement is intentionally structured to provide a range of engagement opportunities. Being on the membership list means, at a minimum, members are receiving email updates, event announcements, and quarterly eNewsletters. We encourage additional engagement in many of these communications (for example, often ending the newsletter with an invitation to respond and provide feedback or take an action step). We also provide opportunities for feedback and ideas on programming within each webinar and meeting. Our programming often features network members who share learning, strategies and resources with event participants. Finally, we have created forms on our website to solicit input.

PROGRAMMING

2022 Program Overview

In **January**, we presented a workplan for 2022 to the Steering Committee with an intention of building on the previous year's pandemic-response work related to the expansions made possible by the American Rescue Plan Act (ARPA) as well as issues of racial and gender equity and the tax code. That month, in preparation for EITC Awareness Day, we hosted a webinar that featured several of our COOP Fund awardees. We also planned to deepen our work to strengthen the funder ecosystem and in **February**, hosted conversations with national funders around the country, members in California and our partners at the Florida Philanthropic Network. We also selected a firm, [1235 Strategies](#), to assist us with a social media campaign focused on young adults. In **March**, we hosted our Annual Policy Webinar and worked closely with 1235 Strategies, some of our members and other partners to implement the social media campaign. In **April through May**, we concluded the social media campaign and began the process of gathering data and lesson from both the campaign and COOP Fund. In **June**, we co-hosted an in-person session for Florida funders in Tampa. We also hosted a webinar to share findings from the social media campaign and our very first New Members Orientation. In **July and August**, we worked with our partners at Prosperity Now's Tax Opportunity Network to host conversations with funders

and field partners on innovations within the ecosystem that supports tax credits. **In September**, we hosted our biannual in-person session for network members in Atlanta, GA at the 2022 Prosperity Summit. We spent the last quarter of 2021 (**October through December**), documenting the findings from our special projects, hosting conversations related to innovations and the tax credit landscape in California, as well as hosting our final virtual meeting of the year.

Programming: Meetings, Peer-to-Peer Conversations, a Funder Convening and Webinars

Webinars and meeting provide a platform to disseminate information about emerging issues in the field and to build partnerships. Typically, the EITC Funders Network hosts 3-4 webinars per year. In 2022, we also hosted peer-to-peer conversations, an in-person meeting Florida-focused funders, our biannual in-person network meeting at the Prosperity Summit and two New Member Orientations. For a few offerings, we also changed our regular webinar format to a virtual meeting format to allow for more interaction among participants.

The Network hosted its annual policy webinar in March which was focused on the opportunities and challenges at both the federal and state levels for the CTC and EITC. In June, we co-hosted an in-person meeting with Florida funders in Tampa, a new member’s orientation, and a webinar to share findings from our youth-focused social media campaign. In September, we hosted our in-person network meeting at the 2022 Prosperity Summit in Atlanta, GA. And in December, we hosted a meeting to share findings from the network’s special projects. Links to descriptions of these events as well as registration numbers are represented in the chart below. Recordings of each virtual event were available and disseminated after the events either through the website (<https://eitcfunders.org/network-events/>) or upon request.

2022 EITC Funders Network Webinars and Funder Conversations

| DATE | 2022 EVENTS | REGISTRANTS |
|----------------|--|-------------|
| January 2022 | Improving Economic Security Through Tax Credits Awareness | 65 |
| March 2022 | The EITC Funders Network Annual Policy Webinar | 34 |
| June 2022 | An In-person Meeting for Florida Funders, Tampa FL | 17 |
| June 2022 | New Member Orientation | 9 |
| June 2022 | Reach Them Where They Are: Lessons from a Social Media Campaign to Inform Young Adults About the Expanded EITC | 80 |
| September 2022 | In-person Session at the 2022 Prosperity Summit | 26 |
| December 2022 | Moving from Learning to Action- A Meeting About the EITC FNs 2022 Special Projects | 50 |
| December 2022 | New Member Orientation | 3 |
| Total | | 284 |

Co-sponsored Events & Meetings

In an effort to maintain a strong connection between our work across ecosystems, we also co-sponsored 5 events with other funders and funder networks in 2022. Events were co-sponsored with Community Foundation Opportunity Network and Community Foundations Leading Change, the Economic Opportunity Funders, the Florida Philanthropic Network, Northern California Grantmakers and Prosperity Now’s Tax Opportunity Network.

In 2022, we also hosted several calls with a roundtable of national funders who support tax credit work across the country. These periodic funder calls provided space for national funders to discuss funding strategies and other opportunities to work together across the ecosystem.

In-person Meetings

Biannual Network Meeting

The pandemic and racial reckoning of the past few years underscored vast inequities, calling each of us to rise to the challenge to invest in solutions. This time has opened the door to innovations, even in long-standing fields like tax credits outreach and tax preparation, which are critical to racial, ethnic and gender equity. During the 2022 Prosperity Summit on **September 20th in Atlanta, GA**, the network gathered in-person for the first time since 2019.

At the meeting, **Darrick Hamilton of the New School**, shared more about the important connection between equity and tax policy and a panel discussed their work related to tax credits and innovations of the past year. **Lauren Thomas Priest from the Community Foundation of Greater Atlanta** joined the panel with her grantee **Economy F. Jackson of the United Way of Greater Atlanta**. And **Sari Raskin from the Community Foundation of Northern Virginia** joined the panel with her grantee **Ivana Escobar from United Community**.

Funders also had an opportunity to network and discuss emerging strategies with their funder colleagues.

In-person Meeting for Florida Funders

In September 2021, Economic Opportunity Funders, EITC Funders Network and Florida Philanthropic Network co-hosted a webinar providing information on how funders were working to develop capacities among policy and grassroots engagement groups in Florida to create ecosystems of policy change. At the end of this conversation, funders expressed interest in coming together in-person in 2022 to continue the conversation.

In June 2022, we convened a smaller group of deeply invested funder partners in Tampa, Florida to engage in a strategic conversation to connect the dots across our work to improve economic security and discuss strategies for building more impactful partnerships and outcomes in Florida. The goal of this meeting was to engage in a strategic conversation about the ways funders are working to develop capacities among policy and grassroots engagement groups in Florida to create ecosystems of economic security policy change, inform and align investments, and improve outcomes. Seventeen attendees participated in the conversation and worked to develop next steps that will be coordinated by the Florida Philanthropic Network.

New Members Welcome

As a way to foster greater connection among network members, we began hosting biannual New Member Welcome meetings in 2022. The meetings provided new members with an opportunity learn more about the network, connect with network colleagues and hear about upcoming events, programming and other network activities. New Member Orientation meetings were scheduled in June and December of 2022.

Tax Credits Roadshow and Speaking Engagements

The EITC Funders Network Roadshow was originally developed to introduce health funders to the EITC and its connection to positive health outcomes. The Roadshow was well received by funders across the country. We decided to expand the audience of the roadshow, so it is available for all funders who are interested in learning more about the intersections between tax credits and health and how to plug into the ecosystem that is moving this work forward. As a part of the roadshow, we put together state-specific information for any organization or funder network who would like more information about how tax credits intersect with their grant-making priorities. In 2022, the EITC Funders Network hosted a roadshow with the **Northern California Grantmakers**.

NETWORK COMMUNICATIONS

Email Engagement

In addition to alerting members to Network events, we periodically send substantive updates to our members via email as well as Network and philanthropy supporting organizations' updates. Across our various missives, engagement (as measured by open rates) increased a bit as compared to 2021.

EITC Funders Network 2022 Email Engagement (in comparison to 2020, 2021)

| | 2020 | 2020 Average Open Rate | 2021 | 2021 Average Open Rate | 2022 | 2022 Average Open rate |
|--------------------------|-----------|------------------------|-----------|------------------------|-----------|------------------------|
| Total emails sent | 27 | 19% | 49 | 22% | 16 | 29% |
| Event emails* | 15 | 12% | 35 | 20% | 7 | 29% |
| Newsletter emails | 4 | 21% | 4 | 21% | 4 | 30% |
| Updates/Alerts | 8 | 25% | 10 | 24% | 5 | 28% |

Source: Constant Contact email report, 1/4/2023. The open rate of the event emails varied depending on the recipients - e.g., the first invitation is sent to the entire list and the subsequent emails are sent to non-responders and then to registrants. The open rate for the event emails noted here is an estimate and is based on the initial email sent to the entire list for the basis of comparison.

eNewsletters

Each year, we publish four eNewsletters that highlight emerging issues in the field and feature interviews with funders or researchers. Newsletters are emailed to all members and posted on our website (<https://eitcfunders.org/newsletters/>).

1. The [March 2022 eNewsletter](#) featured an [interview](#) with **Brian Myer, the Former Senior Vice President of Impact at Dogwood Health Trust**. Brian shared information about Dogwood's decision to support work related to tax credits (due to their connection to improve health outcomes) and tips for funders who are considering investment in tax credit and tax policy work.
2. The [June 2022 eNewsletter](#) featured an [interview](#) with **Sari Raskin, Vice President of Grants and Community Leadership at the Community Foundation for Northern Virginia** and a grantee partners from **United Community, Ivana Escobar, Director of Collective Impact and Elizabeth Villatoro, a Neighborhood Ambassador**. This trio discussed their work as COOP Fund Awardees working to maximize the number of newly eligible individuals and families claiming the expanded EITC.
3. The [September 2022 eNewsletter](#) featured an unpublished interview with **Cecille Blondet Passalacqua, Executive Director at Espacios Abiertos**. Puerto Rico was hit with a devastating hurricane which delayed publication of this interview. In the interview, Cecille discussed equity challenges and the impact of tax credits on families in Puerto Rico.
4. The [December 2022 eNewsletter](#) featured an [interview](#) with **the staff of the EITC Funders Network**. In the interview, Ami and Deneisha shared information and key takeaways from our 2022 special projects.

EITC Funders Newsletter Open Rates, 2019-2022

| eNewsletters | 2019 Opens | 2020 Opens | 2021 Opens | 2022 Opens |
|------------------|------------|------------|------------|------------|
| Average | 25% | 21% | 21% | 30% |
| December | 23% | 16% | 30% | 29% |
| September | 26% | 23% | 19% | 30% |
| June | 22% | 28% | 18% | 30% |
| March | 27% | 18% | 17% | 31% |

Source: Constant Contact email report, 1/14/2023.

We saw fairly constant open rates for our eNewsletter across 2022. Generally open rates were up as compared to 2021. It's important to note that not all eNewsletter readers access the newsletter through the eblast. Newsletters can also be accessed directly from the website, which according to the analytics, is one of the most visited pages on the website.

EITC Funders Network Branded Materials

In 2022, the EITC Funders Network published an update to our Funding Social Change Worksheet to make it more inclusive of the whole funder ecosystem (not just policy and grassroots funders). The final report for our Community Foundation Outreach & Opportunity (COOP) Fund was also published in 2022.

1. [Funding Social Change Worksheet \(Update to 2021 Version\)](#)
2. COOP Fund [Final Report](#) and [Report Highlights](#)

SPECIAL PROJECTS

Blue Shield of California Foundation Scoping Project

In the Fall of 2022, the EITC Funders network partnered with the Blue Shield of California Foundation to undertake a scan of the California tax credit ecosystem. The goal of the project was to better understand the major field and funder players working to improve access to state tax credits for low- and moderate-income Californians, the various roles they play, and the questions that need to be answered to increase the number of low- and moderate-income families who have access to California tax credits. In order to reach this goal, the research team used a three-pronged approach eliciting input from three critical groups working in the California tax credit ecosystem...field partners, funders and philanthropy serving organizations.

The inquiry was under-pinned by a set of questions:

- Who are the major field and funder players working to improve access to state tax credits for low- and moderate-income Californians?
- What are the roles played by organizations working within the ecosystem?
- What are the strengths, bright spots? challenges? Gaps?
- What questions need to be answered to increase the number of low- and moderate-income families who have access to California tax credits?
- What else/who else should the Blue Shield Foundation know about as it scans the tax credit ecosystem? (Other funders? Organizations? Initiatives? etc.)

Twenty on field partners, ten funders and four PSOs participated in interviews or focus groups hosted in November and December. A final report will be available early in 2023.

Community Outreach and Opportunity Fund (CO-OP Fund)

During a virtual convening on August 2021, the White House issued a call to action for community foundations to accelerate efforts to identify and fund "last-mile" outreach efforts that can assist non-filer families in enrolling to receive the Advanced Child Tax Credit made possible by the American Rescue Plan (ARPA). EITC Funders Network, in partnership with Community Foundation Opportunity Network and CFLeads, rapidly responded to this call to action to quickly stand up the Community Outreach and Opportunity Fund (CO-OP Fund).

The purpose of the CO-OP Fund was to engage community foundations between September 2021 and April 2022 to help ensure that as many families as possible receive the full Child Tax Credit (CTC) and Earned Income Tax Credit (EITC) benefits they are eligible for, as quickly and as easily as possible.

The CO-OP Fund is generously supported by a number of charitable foundations including Charles and Lynn Schusterman Family Philanthropies, the Rockefeller Foundation, The Annie E. Casey Foundation, and the Bill & Melinda Gates Foundation. The CO-OP Fund was staffed by the EITC Funders Network and guided in partnership with Community Foundation Opportunity Network (CFON) and CFLeads.

The expansions of the federal CTC and EITC presented a critical opportunity to dramatically improve financial stability for families with low income. However, these expansions could only achieve their goals if families knew about the credits, were able to enroll, and could get their taxes done in free and non-predatory settings. CO-OP Fund Awardees worked on the big push to reach an estimated 5 million non-filers. **They assisted them with three interrelated touchpoints: outreach and navigating enrollment, helping families to file or reconcile tax returns, sharing stories of success and shaping the local narrative on families in need in early 2022.**

The CO-OP Fund supported 24 community foundation awardees across the United States:

- [ACT for Alexandria](#)
- [Albuquerque Community Foundation](#)
- [Central New York Community Foundation](#)
- [Community Foundation for Greater Atlanta](#)
- [Community Foundation for Greater Buffalo](#)
- [Community Foundation for Muskegon County](#)
- [Community Foundation for Northeast Florida](#)
- [Community Foundation Santa Cruz County](#)
- [Duluth Superior Area Community Foundation](#)
- [Fairfield County's Community Foundation](#)
- [Legacy Foundation](#)
- [Lincoln Community Foundation](#)
- [New Hampshire Charitable Foundation](#)
- [Northern Chautauqua Community Foundation](#)
- [Oregon Community Foundation](#)
- [Placer Community Foundation](#)
- [Southwest Initiative Foundation](#)
- [St. Paul & Minnesota Foundation](#)
- [The San Diego Foundation](#)
- [Whatcom Community Foundation](#)
- [Richmond Community Foundation](#)
- [The Chicago Community Trust](#)
- [The Community Foundation for Northern Virginia](#)
- [The Miami Foundation](#)

Project Impact

Twenty-four projects helped thousands of families obtain federal tax credits and complete tax returns in free, safe settings. **By the end of the initiative, the CO-OP Fund awardees helped secure more than \$75 million in federal tax refunds for low-income families (an average of \$3.8 million in federal returns per site reporting).** Generally, this is likely to be an underestimate of financial impact due to the great difficulty of tracking families and returns and that it does not include state credits and returns. It is important to note that one site accounted for about one-third of the total secured by CO-OP sites. Even when this outlier is removed from calculations, the average secured per site reporting was \$2.8 million in federal returns.

Key Findings

A comprehensive report of key findings and learning can be found in the COOP Fund [Report Highlights](#) and [Final Report](#). A summary of key findings is below:

- Funders can work in aligned ways – national-to-national funders and national-local funders. Collaboration may be tricky, but it can be done with positive impact.
- Investing in projects to enable more families to access the tax benefits for which they are eligible can incentivize additional public and private investment and can have a significant return on investment.
- Community foundations, due to their deep ties to trusted local partners, can be a conduit for national programming.
- Building on and leveraging existing relationships, program strategies, and infrastructure supports success.

- Investing in infrastructure development and maintenance year-round helps communities to remain prepared for tax season, allows local groups to better compete with paid preparers and builds social capital in communities.
- If evaluation or assessment of impact is important, the current inadequate and woefully antiquated data systems will need to be reimaged and replaced.

EITC Pooled Fund

Economic Opportunity Funders and the EITC Funders Networks administer and oversee the State EITC Rapid Response, the State EITC Campaign Fund, the State EITC Policy Development Fund, and the Federal EITC Campaign Fund to advance tax fairness and economic opportunity for low-income workers and families through the promotion, protection, and expansion of the federal and state EITC, CTC and other tax credits. The four funds – together known as the [EITC Pooled Fund](#) – are guided by an advisory group, supported by five 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. Participating foundations in the EITC Pooled Fund include: The Annie E. Casey Foundation, The Bernard and Anne Spitzer Charitable Trust, The Rockefeller Foundation, W.K. Kellogg Foundation, and an anonymous donor.

In 2022, the EITC Pooled Fund celebrated its 10-year anniversary. A [webinar](#) was hosted to celebrate the milestone. A 10-Year Summary, [EITC Pooled Fund: A Decade of Advancing Tax Fairness and Economic Opportunity](#) and [EITC Pooled Fund Timeline](#) was published to commemorate this accomplishment.

The EITC Pooled Fund has made four awards in 2022 to state organizations working to help build public support for state EITCs, CTCs and other tax credits.

- [Michigan League for Public Policy](#) was awarded \$30,000 to support efforts to increase the Michigan EITC from 6% to 20% or 30%.
- [Colorado Fiscal Institute](#) was awarded \$35,000 to support efforts to restructure TABOR rebate mechanisms to make them fairer, modernize them, simplify them, and ensure that working Coloradans receive a larger TABOR refund amount.
- [The DC Fiscal Policy Institute](#) was awarded \$35,000 to support efforts to extend eligibility for DC's EITC to workers filing taxes with an individual taxpayer identification number (ITIN); grow take-up of the DC EITC; and ensure that receipt of other public benefits is not put at risk due to monthly payment of the credit.
- [Georgia Budget and Policy Institute](#) was awarded \$35,000 to support efforts to build public support for the creation of a state EITC (locally known as the Georgia Work Credit).

The Federal EITC Campaign Fund was established in 2020 as an invitation only fund and provides support to national and state-based policy groups to support work on the federal EITC and CTC, including work on tax-based benefits in the context of federal stimulus and relief packages. The [Federal EITC Campaign Fund](#) made four awards in 2022:

- [Humanity Forward](#) was awarded \$192,500 to support efforts to educate stakeholders and build public support for the Child Tax Credit through earned media, briefings, an ad-hoc coalition, and nonpartisan polling and research.
- [1235 Strategies](#) was awarded \$75,000 to develop and implement a social media campaign to reach out to and educate young adults of the newly expanded federal EITC and encourage them to complete their taxes in a nonpredatory setting.

- [Hispanic Federal of Puerto Rico](#) was awarded \$50,000 to work with a larger coalition of organizations on the island to raise awareness of the federally supported, newly established EITC in Puerto Rico.
- [Center for Rural Strategies](#) was awarded \$100,000 to continue efforts to advance and improve policy and uptake of the federal EITC and CTC.

To date, \$7,700,500 has been awarded to 36 state networks and 7 national networks: \$1,648,000 in state EITC rapid response funds, \$3,015,000 in state EITC campaign funds, \$2,110,000 in state EITC policy development funds and \$927,500 in federal EITC campaign funds. The remaining funds were allocated to support staffing the administration of the project, technical assistance contracts, an in-person meeting for Florida funders, and an update to the [infographic](#) on how funders can come together to build ecosystems that advance economic opportunity.

Innovations Project with the Tax Opportunity Network

In the Summer and Fall of 2022, the EITC Funders Network and Prosperity Now's Tax Opportunity Network hosted a series of conversations with field partners and funders to generate a range of ideas focused on innovations that help low- and moderate-income people access all available credits, reduce hurdles to getting their taxes completed and expand capacity of free and non-predatory tax services. These ideas will be brought together in a series of short innovation briefs in the early 2023. Topics will include:

- Changes that can be made within the current VITA program
- Future Government Funded Free Tax Filing Assistance
- Assisted self-filing/FSA
- Regulating paid preparers
- Systemic improvements at the IRS (such as pre-populated forms, speed, definitional changes-simplifying or changing qualifying child, household, etc); and,
- Effective engagement strategies for funders and partners

Youth-focused Social Media Campaign

In 2022, the EITC Funders Network supported a social media campaign aimed at reaching young people who were newly eligible for the EITC during this past tax season. With the passage of the American Rescue Plan Act (ARPA), the federal EITC was expanded to low-income young adults not claiming children on their taxes. For the first time, many more young adults could get \$1500 back into their pockets, but they needed to file their taxes to do so.

Understanding this was a very hard-to-reach population, the EITC Funders Network partnered with [1235 Strategies](#) to develop and implement a social media influencer campaign to directly reach young adults through their existing networks during the final weeks of tax season. With the youth-focused social media projects there was an element of experimentation which was centered around how social media influencers could be a conduit of information to help low-income, young adults get tax benefits in low-cost settings.

We worked with a variety of partners throughout the campaign. Deneisha Thompson, Senior Associate for the EITC Funders network, was also a [guest on a radio show](#) hosted by Generation Justice in New Mexico. The graphic below shares some of the results of the campaign.

Campaign by the numbers (Mar 17 - Apr 22)

| | |
|---|---|
| Social influencer partnerships | 9 influencers (7 TikTok; 2 Insta) |
| Total social engagements [from social influencers only] | 307,164 (includes likes, comments & shares) |
| Total social views [from social influencers only] | 2.7M individuals reached |
| Paid ad campaign [6 sets of ad creative] | 1.3M individuals reached |
| Total traffic to GYR.org [from social influencers + ads] | 141,484 homepage views |
| Total est. refunds generated [from social influencers + ads] | \$624k+ est. total* |

From this campaign we learned:

- Starting by centering the needs of our audience is essential. Traditional methods work best in many communities but something different was needed to reach young people.
- Social media was a great tool for reaching young adults directly through influencers and their loved ones.
- Simple messages with a clear call to action that could be done right away was key to running a successful campaign.
- We developed several clear calls to action but had to be willing to give up some messaging “control” and trust the influencers to develop interactions that would resonate with their audience.
- Diversity among influencers was key to reaching young people nationwide.
- Challenging our assumptions about which influencers would work with each target population allowed us to be pleasantly surprised by reaching young people both directly and indirectly (through loved ones).
- Investing in digital ads allowed us to amplify our messages well past when they were posted and for the duration of the tax season.