

Change Makers Activate! Supporting Innovative State Policies: A Case Study of State EITCs

Thursday, October 21
1:00 - 2:00 pm EDT

Presented in Partnership with:



WEBINAR CONTROL PANEL

PARTICIPATE

During the presentation –
Type your question in the
Q&A BOX
to be addressed during
discussion breaks or
during Q/A



CLOSED CAPTIONS

Captions can be turned on via
the
LIVE TRANSCRIPT
to be viewed in real-time
and will also be available in
the recording afterwards



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Working Together to Achieve Economic Security for All

As the leading national grantmaker membership organization focused on advancing economic security, the Asset Funders Network engages philanthropy to confront inequities and advance equitable wealth building and economic mobility.

INFORM | CONNECT | INFLUENCE | BUILD

SPEAKERS



Rachel Isacoff

Moderator

The Rockefeller
Foundation



James Jiminez

New Mexico Voices for
Children



Abby Levine

Bolder Advocacy



Ami Nagle

EITC Funders Network
and
EOF Funders



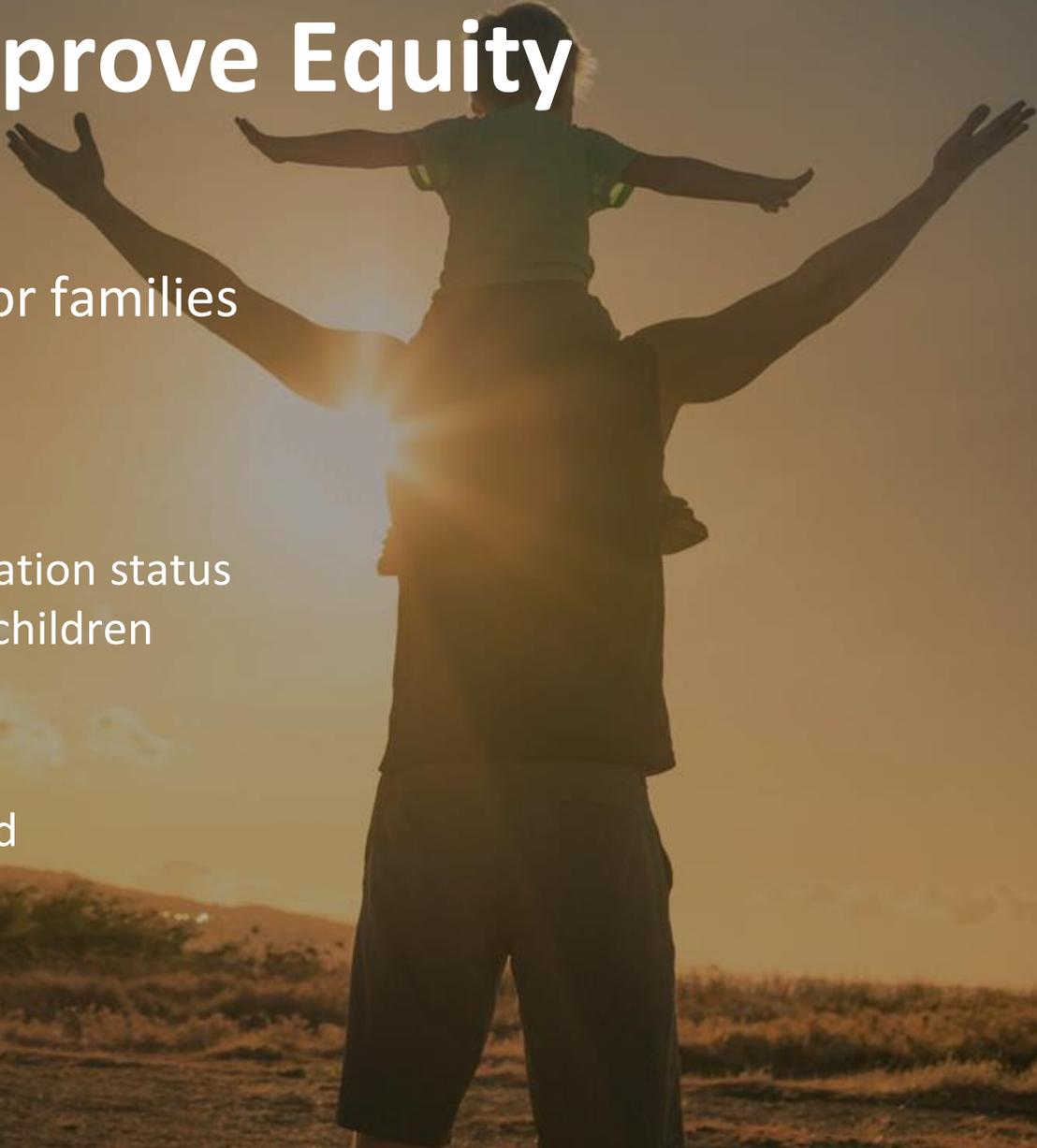
Emily Vyhnaneck

Washington Budget and
Policy Center

Actions to promote progress

- 30+ fiscal policy presentations
- 40 fiscal policy publications
- 25 community roundtables
- Training 100+ community members
- 45,000 mailers
- 800+ phone calls generated

Tax Credits to Support Families and Improve Equity



House tax package (HB 291) passed

- \$100 million+ more every year for families

State EITC (WFTC)

- Increased by 47%
- Expanded to filers regardless of immigration status
- Expanded to younger workers without children

Low-Income Tax Rebate (LICTR)

- Amount of rebate to NM families tripled
- Income threshold increased
- Indexed to inflation

Tax package will benefit 500k households

**10,000
ITIN
filers**

**260,000
parents**

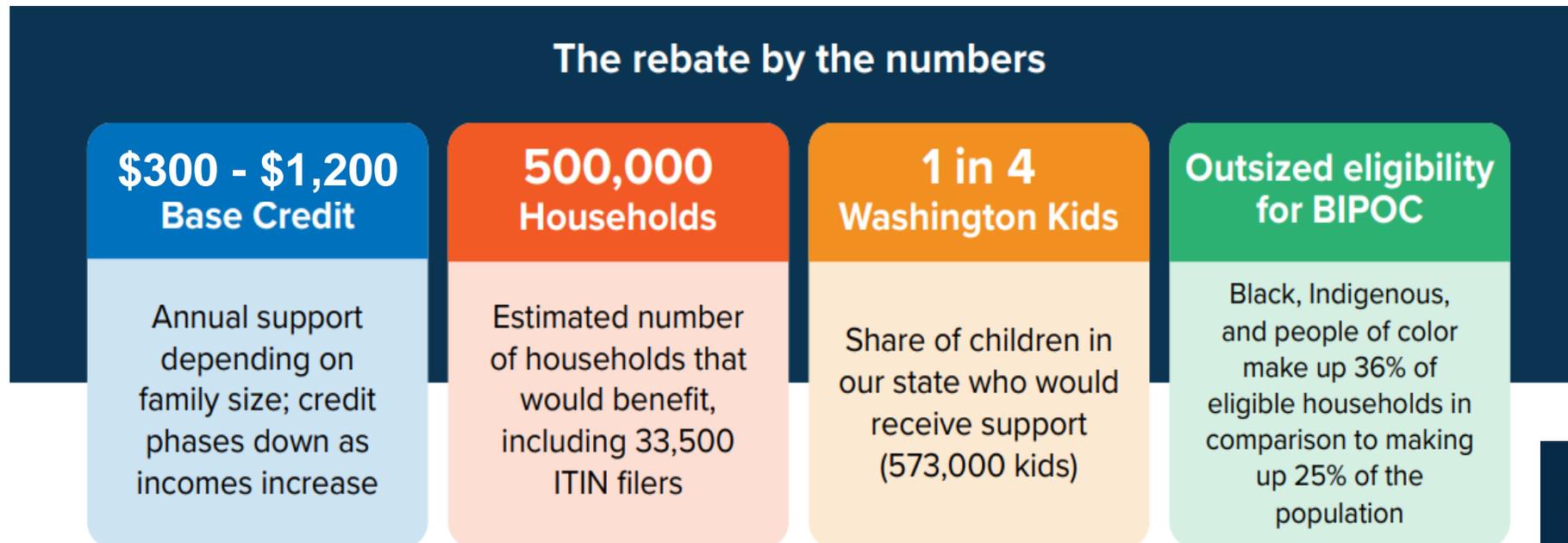
**41,000
young
worker
s**

**56,000
seniors**

**75%+
benefits
to POC**

Washington's Modern Working Families Tax Credit

In 2021, Washington state expanded & *finally* funded its Working Families Tax Credit:



Onwards: Implementation

Working Families Tax Credit Infrastructure is being set up as we speak & payments will begin for distribution in 2023!

The Working Families Tax Credit is shifting gears towards 3 core areas:

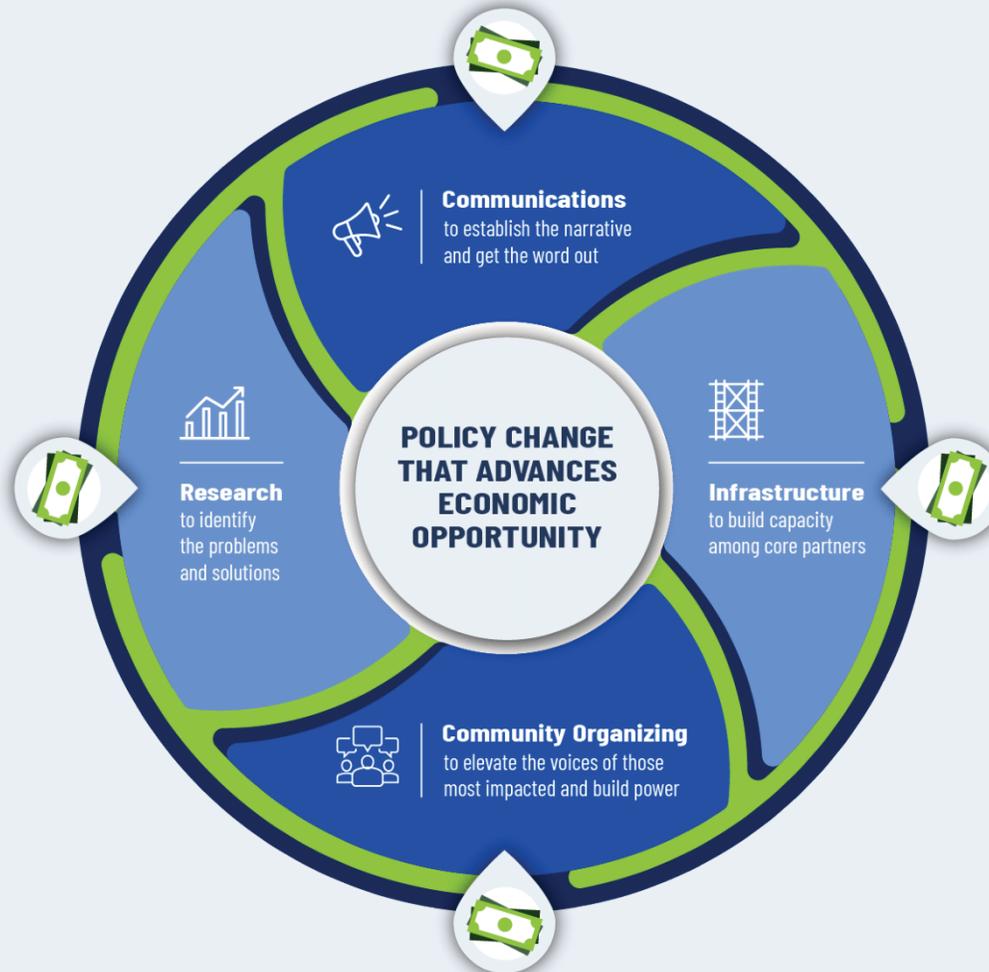
- ✓ Equitable & Successful Implementation
- ✓ Statewide Outreach Campaign
- ✓ Future Legislative Expansions

Funding Social Change:

How Grassroots and Policy Funders Can Build Ecosystems to Advance Economic Opportunity



EITC
Funders Network



Examples of funding opportunities within the ecosystem include:

Research

- ✓ Community member input
- ✓ Data modeling
- ✓ Policy analysis
- ✓ Public polling

Community organizing

- ✓ Advocacy training
- ✓ Community outreach
- ✓ Mobilization

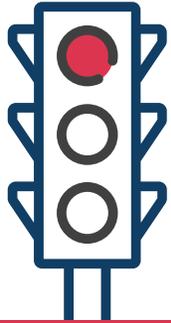
Infrastructure

- ✓ Organizational bandwidth
- ✓ Partnership building
- ✓ Staff time

Communications

- ✓ Media outreach
- ✓ Messaging
- ✓ Policymaker education
- ✓ Public education

Advocacy for 501(c)(3)s



Partisan
Political

Lobbying

Organizing

Public
Education

Nonpartisan
Voter Ed.

Influencing
Corporations

Educating
Legislators

Educational
Conferences

Lobbying
Exceptions

Regulatory
Efforts

Get to Know
Legislators

Research

Training

Litigation

Private foundations prohibitively taxed
Public charities have generous limits
Insubstantial part test
501(h) expenditure test
Contributions raised for lobbying not
tax deductible

Private foundations should not **earmark** grants for lobbying, but private foundations may fund grantees that **lobby**.

\$\$\$

General
Support
Grants

Specific
Project
Grants

If a grant is not earmarked for lobbying or any other specific project, the foundation is not responsible for grantee lobbying.

If a foundation grant is less than or equal to a project's non-lobbying component, the grant is not a lobbying expenditure.

Thank you for attending today's
Asset Funders Network presentation

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**WE VALUE YOUR TIME,
AND YOUR RESPONSES WILL INFORM
OUR FUTURE PLANNING**