



2016 Annual Report

Executive Summary

Participation in GIST remained strong, with a total of 227 funders currently in the GIST network. During this reporting period, GIST held two in-person meetings and nine webinars.

Date	Event	Registrants
Jan 2016	Webinar - The 2016 Elections and Nonpartisan Grantmaking	79
Feb 2016	Webinar - Creating a Representative Electorate Through Nonpartisan Voter Registration	64
Feb 2016	Webinar - The New SCOTUS: A Seismic Change in the Judicial Landscape	61
Feb/Mar 2016	Meeting - The Future of the Social Safety Net-Secure or Shredded?	45
Apr 2016	Webinar - Ballot Initiatives Making a Mark on Your Grantee's Cause	47
Jun 2016	Webinar - Combating Polarizing Narratives: Proactive Strategies from Anti-Islamophobia Advocates	36
July 2016	Webinar - Government Spending Priorities: Shaping the Conversation	22
August 2016	Webinar: Determining Destiny: Long-term Opportunities to Empower the Latino Electorate	60
September 2016	Webinar: Roll up Your Sleeves: Rapid Response Needs for the 2016 Elections	46
September 2016	Webinar: Power, Money, and the Pentagon	13
November 2016	Meeting: 2016 Post-Election Briefing: Politics, Policy and Philanthropy	70
TOTAL		543

GIST also provided staff support to five working groups:

1. **Communications Collaborative:** Established in 2009, the Communications Collaborative is a network of nearly 50 grantmakers representing national and regional foundations interested in coordinating investments to build communications capacity in the field. GIST staff maintained a private listserv and supported member interest and activities in the use of national narratives that seek to promote a healthy public sector and economic opportunity for all.
2. **EITC Rapid Response and Policy Development Fund (The Fund):** The Rapid Response Fund was developed to facilitate the quick dissemination of targeted funds to state groups with emergent EITC work needs or states that are building capacity for EITC work in the near future. GIST staff administered the RRF and awarded \$180,000 to four state networks (in HI, KS, MD and MO). GIST staff also administered the 2015-2017 Policy Development Fund (PDF), which awarded \$450,000 to three state networks (in GA, MS, and WV) to support longer-term policy development and build public support for state EITCs. The Fund also supported an EITC communications research project on developing strategies to connect the Rapid Response Fund efforts to a larger economic narrative and hired two consultants to begin efforts to document the process, impact and lessons of The Fund.
3. **GIST Mapping Project:** GIST staff maintained an online, interactive mapping tool for funders to help illustrate where investments are being made in policy, advocacy and communications work in the states, and to help foster connections across these efforts. There are 37 national networks and nearly 1,260 state policy and advocacy groups currently represented on the map. The map and a companion analysis are updated annually in the first quarter of the year. To access this tool, visit <http://gistfunders.org/geographicmapping.php>.
4. **Budget Working Group:** The Budget Working Group is a joint affinity group effort formed in March 2016 that brings together funders from the Grantmakers Income Security Taskforce, Peace and Security Funders Group, and Funders' Committee for Civic Participation's Money in Politics Working Group who are interested in exploring the unequal dynamics of wealth, power and influence in America through the lens of the federal budget. The goal is to enrich grantmaking strategies and connect learning across grant-making silos by thinking more deeply together about how the projects our members fund intersect with discussions around spending priorities and the federal budget. The Budget Working Group maintained a listserv and hosted two webinars to facilitate information-sharing and learning.
5. **Funders Transition Strategy Room.** This working group was created in late 2016 with the goal of convening a small group of strategic, policy-focused funders to check in and compare notes about existing and new investments as well as policy and political intelligence across the various poverty and opportunity issues and sectors as we head into this important period of federal policy action with a new President, Administration and Congress. It is an invitation only working group with approximately 30 funders participating. GIST staff facilitated three calls and a private listserv.

Detailed Report

GIST is an informal association of grantmakers from national, regional and local philanthropies that are active in alleviating poverty, expanding economic opportunity, and building assets among low-income families in the United States. It operates as an umbrella group for participating foundations, providing a forum for strategic discussion. Through its work, GIST has helped grantmakers to:

- **Deepen their understanding of the cross cutting issues of poverty and economic opportunity, support for low-wage workers, and adequate public resources.** Events are well attended and engage additional GIST members as well as other grantmaker affinity groups -- including the Early Childhood Funders' Collaborative, EITC Funders Network, Funders' Committee for Civic Participation (FCCP), Funders for Just Economy (FJE), Peace and Security Funders Group (PSFG), Workforce Matters and others -- in poverty alleviation, economic opportunity and tax and budget issues. Notably, GIST engaged partnered with one or more affinity groups for almost all of its events.
- **Keep abreast of policy developments, advocacy strategies, cutting-edge ideas and communications innovations that support effective grantmaking.** High-profile grantmaker briefings and virtual webinars provide members with a wealth of information, resources, and ideas related to GIST's priority issues. The meetings are designed to include a mix of presentations and discussions with leading national thinkers, practitioners, and advocates as well as grantmaker updates and strategy sessions. Webinars are scheduled as needed to respond to emerging opportunities or needs and enhance information sharing and participation in GIST between meetings. Evaluations indicate participants are very satisfied with event agendas and content, and intend to incorporate the information they learned in their grantmaking.
- **Work collaboratively to support policies and program initiatives.** GIST provides staff support for five working groups, including the Communications Collaborative, EITC Fund, GIST Mapping Project, Budget Working Group, and Funders Transition War Room. Working groups offer funders opportunities for information sharing and learning as well as the coordination and alignment of investments among identified areas of interest.
- **Strengthen philanthropic investments aimed at alleviating poverty and providing opportunity for all families to achieve economic stability.** GIST briefings help educate foundation representatives and philanthropic advisors about the importance income security issues and the role that foundations can play in supporting and expanding research, advocacy, and grassroots organizing in the field. Special strategy sessions held at these briefing provide grantmakers with the opportunity to reflect on presentations and discussions and consider strategies and opportunities for investments both individually and collectively. The State EITC Rapid Response Fund (The Fund) was established in 2012 as a virtual pool of funds that could be quickly granted to address pressing political threats or opportunities. The Fund is guided by an advisory group and administered by GIST in partnership with the EITC Funders Network, Center on Budget and Policy Priorities and the Hatcher Group. Recognizing that in some states changing the public dialog on state EITCs will take a longer-period of time, Fund leaders established a new State EITC Policy Development Fund (PDF) in 2014, where multi-year support will be provided.

In 2016, GIST held two in-person meetings, nine webinars, and supported five working groups. Participation in GIST remained strong with a total of 227 funders in the GIST network. GIST gained 58 new members and lost 27 members in 2016. GIST staff worked closely with the Steering Committee to plan and carry out several successful events that advanced GIST goals. Major accomplishments included:

1. **Planning and coordinating in-person and virtual GIST meetings and events.** GIST staff worked closely with the Steering Committee to plan and carry out several successful events that advanced GIST priorities. Major activities included:
 - **GIST co-sponsored six webinars with FCCP, the Environmental Grantmakers Association (EGA), Grantmakers Concerned with Immigrants and Refugees (GCIR), Health and Environmental Funders Network (HEFN), Neighborhood Funders Group (NFG) and Women Donors Network (WDN) as part of an Election Webinar Series led by FCCP.** These included:
 - **The 2016 Elections and Nonpartisan Grantmaking** webinar was held on January 11, 2016. This webinar discussed the public discourse surrounding the 2016 elections, and explored how the 2016 elections can impact our collective work. Approximately 79 funders registered for this event.
 - **Creating a Representative Electorate Through Nonpartisan Voter Registration** webinar was held on February 1, 2016. This webinar provided an in-depth look at the analysis of the gaps, needs, and opportunities for nonpartisan voter registration in 2016. Approximately 64 funders registered for this event.
 - **Ballot Initiatives Making a Mark on Your Grantee's Cause** webinar was held on April 4, 2016. This webinar provided an in-depth conversation with the Ballot Initiative Strategy Center about the valuable role that 501(c) (3) foundations can play in contributing to the success of these campaigns. Approximately 47 funders registered for this event.
 - **Combating Polarizing Narratives: Proactive Strategies from Anti-Islamophobia Advocates** webinar was held on June 27, 2016. This webinar explored some of the latest research, messaging guidance and organizing which is helping to guide national strategies and offered lessons learned that you can be applied the funder and grantee work in supporting other communities of interest. Approximately 36 funders registered for this event.
 - **Determining Destiny: Long-term Opportunities to Empower the Latino Electorate** webinar was held on August 1, 2016. This forward-looking webinar explored long-term strategies for supporting a vibrant Latino electorate and advancing policy change on the issues they care most about. Approximately 60 funders registered for this event.
 - **Roll up Your Sleeves: Rapid Response Needs for the 2016 Elections** webinar was held on September 12, 2016. This funders-only discussion shared intelligence on timely, nonpartisan opportunities for philanthropy to help ensure full and fair participation in the democratic process. Funder colleagues discussed critical gaps as well as exciting

opportunities for rapid response funding to be effectively deployed in these final two months. Approximately 46 funders registered for this event.

- **The EGA/FCCP/GIST/NFG/Piper Fund/WDN Webinar: *The New SCOTUS: A Seismic Change in the Judicial Landscape*** was held on February 25, 2016. This webinar included a cross-issue discussion on the sudden death of Supreme Court Justice Antonin Scalia and a preview of the new judicial landscape in 2016. Approximately 61 funders registered for this event.
 - **The GIST/GCYF Meeting: *13th Annual Budget and Tax Briefing: The Future of the Social Safety Net-Secure or Shredded*** was held on February 29-March 1, 2016. This meeting offered funders the opportunity to network with colleagues and learn about and discuss pressing federal and state budget and tax issues and their impacts on low-income families, workers and communities. Approximately 39 funders registered for this event.
 - **The Budget Working Group Webinar: *Government Spending Priorities: Shaping the Conversation*** was held on July 6, 2016. This webinar shared results from several new research studies focused on connecting federal budget issues to the American public. Communications experts shared key findings and explored connections on new communications approaches that build support for increasing revenue and tax reform, reducing Pentagon spending, and mitigating the influence of money in politics. Approximately 22 funders registered for this event.
 - **The Budget Working Group Webinar: *Power, Money, and the Pentagon*** was held on September 29, 2016. This webinar explored how the Pentagon budget connects to both money in politics and the economic security of low-income families. Approximately 13 funders registered for this event.
 - **GIST Meeting: *2016 Post-Election Briefing: Politics, Policy and Philanthropy*** was held on November 16-17, 2016 in Washington, DC. This meeting was co-sponsored with the Early Childhood Funders' Collaborative, Funders for a Just Economy and Workforce Matters and provided funders with the opportunity to assess the new environment in the aftermath of the election and identify opportunities to work strategically and collaboratively to advance the work of philanthropy and improve the lives of low-income families, workers and communities. Approximately 70 funders registered for this event.
- 2. Planning and coordinating working groups.** GIST provides a neutral platform for funders to convene and has the capacity to staff and incubate working groups. GIST currently staffs five working groups.
- **Budget Working Group.** The Budget Working Group is a joint affinity group effort formed in March 2016 that brings together funders from the Grantmakers Income Security Taskforce, Peace and Security Funders Group, and Funders' Committee for Civic Participation's Money in Politics Working Group who are interested in exploring the unequal dynamics of wealth, power and influence in America through the lens of the federal budget. The goal is to enrich grantmaking strategies and connect learning across grant-making silos by thinking more deeply together about how the projects our members fund intersect with discussions around spending

priorities and the federal budget. The Budget Working Group maintained a listserv and hosted two webinars in 2016 to facilitate information-sharing and learning.

- **Communications Collaborative.** Established in 2009, the Communications Collaborative is a network of nearly 50 grantmakers representing national and regional foundations interested in coordinating investments to build communications capacity in the field. GIST staff facilitated a private listserv to provide grantmakers with a platform to discuss and exchange information around strategic communications. In 2016, 339 announcements/articles were shared on the Collaborative listserv. One webinar was held to support member interest and activities in the use of national narratives that seek to promote a healthy public sector and economic opportunity for all.
- **EITC Fund.** Born out of the Communications Collaborative, the Earned Income Tax Credit Fund (The Fund) was developed as a mechanism to facilitate the quick dissemination of targeted funds to state groups engaged in key state EITC battles. The Fund is guided by an advisory group, supported by two national funders and administered by GIST in partnership with the EITC Funders Network, Center on Budget and Policy Priorities and the Hatcher Group. During this reporting period The Fund awarded \$180,000 in rapid response funds to four state networks (HI, KS, MD and MO) with emergent EITC work needs or that are building capacity for EITC work in the near future. To date \$759,000 has been awarded to 19 state networks in rapid response funds. In 2014, Fund leaders discussed the potential for making slightly longer-term investments in targeted states to build public support for state EITCs. As this was a shift in funding style (from rapid response to longer-term policy development), this element of the work has been renamed to the State EITC Policy Development Fund (PDF). The primary purpose of the PDF is to support the work of state-based organizations raising awareness of the importance of a state EITC to the economic success of low-income families. Recognizing that in some states changing the public dialog on state EITCs will take a longer-period of time, multi-year support will be provided. To help maximize learning and shared experiences, the PDF will focus on selecting participants from southern states. The South was chosen because of the tremendous need to develop new and shore-up existing state EITCs in this deep-poverty region, the belief that by focusing on an area we'd be able to maximize the learnings across grantees and better export them to neighboring states, and the desire to work collaboratively with the vibrant community of local and regional southern funders. In August 2015, the PDF awarded contracts to three states (GA, MS, and WV). Each state was awarded \$150,000 over two years. An interactive, online map illustrates the reach and outcomes of the RRF and PDF and can be found at <http://gistfunders.org/EITCRapidResponseFund.php>. The Fund also contracted a messaging firm (Topos Partnership) to explore the set of messages that might shift how people think about the EITC. This research, using deep "talk-back" message testing in several locations across the country, explored how people think about the EITC as a mechanism to reduce poverty and their reactions to messages regarding fraud and abuse of funds and other key message points. See findings from this research [here](#). The Fund also began to document the process, impact and lessons of its work through a retrospective evaluation of the Rapid Response Fund and an exploratory evaluation of the Policy Development Fund. Evaluation activities include document

reviews, awardee surveys and interviews, group data collection at convening(s), funder and leadership team interviews, awardee coaching on data collection, awardee capacity assessments, surveys of a subset of awardees' peers/partners, funding landscape analysis, and in-depth case studies. The evaluation will begin in Summer 2016 and will conclude in Fall 2017.

- **Funders Transition Strategy Room.** This working group was created in late 2016 with the goal of convening a small group of strategic, policy-focused funders to check in and compare notes about existing and new investments as well as policy and political intelligence across the various poverty and opportunity issues and sectors as we head into this important period of federal policy action with a new President, Administration and Congress. It is an invitation only working group with approximately 30 funders participating. GIST staff facilitated three calls and a private listserv.
- **GIST Mapping Project.** Since 2011, GIST has been engaged in geographic mapping—looking at both where national partners are working in the states as well as, to a more limited degree, in funder investments. GIST has developed an online, interactive mapping tool for funders that aims 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. There are 37 national networks and nearly 1,260 state policy and advocacy groups currently represented on the map. The data for this map and a companion analysis are updated annually in the first quarter of the year. GIST staff also developed new national network ecosystem maps to begin to explore how closely connected the national networks are in their work in the states. GIST staff are available to create custom maps for GIST donors on request. To access the mapping tool and companion analysis, visit <http://gistfunders.org/geographicmapping.php>. The national network ecosystem maps are not published on the web site but are available by request.

3. Supporting strong leadership of GIST. GIST staff facilitated monthly calls for Steering Committee members to plan GIST activities and held two in-person Steering Committee meetings to review GIST's activities and accomplishments, finances, and membership, as well as discuss goals and activities for the coming year. During this reporting period, Helen Neuborne, Ford Foundation retired. Amy Brown, Ford Foundation joined the steering committee in her place. Current Steering Committee members include:

- Sandra Ambrozy, The Kresge Foundation
- Amy Brown, The Ford Foundation
- Michael Laracy, The Annie E. Casey Foundation
- Cassandra McKee, Wellspring Advisors
- Lynda Parmely, Hagedorn Foundation
- Paula Sammons, W.K. Kellogg Foundation
- Robert Shull, The Public Welfare Foundation

4. Maintaining and enhancing the GIST Web site and providing ongoing support to GIST members. GIST staff regularly updated the announcements section on the GIST web site home page, and kept

a running archive of meeting agendas, speaker presentations and meeting summaries from recent GIST events. In 2016 the GIST web site received 4,315 visitors (69% new and 31% returning) and approximately 13,800 page views. The top 5 most frequented pages of the web site were: GIST home page (5956 page views), Post-election Briefing pages (1,619 views), Budget and Tax Briefing page (930), Geographic Mapping page (305 views); and EITC Rapid Response Fund (321). GIST staff also responded to requests for information and maintained a private listserv to facilitate information sharing.

- 5. Collaborating with other grantmaker affinity groups.** Planning committees were formed for every event during this reporting period and engaged GIST members, funder colleagues and other affinity group leaders in the development of meeting agendas. Notably, nearly all events during this reporting period were co-sponsored with one or more affinity groups. By jointly sponsoring events with partner affinity groups, GIST was able to leverage additional financial support and attract a larger and more diverse group of participants. GIST staff also regularly reached out to other affinity groups to publicize GIST meetings on their websites and newsletters. GIST staff worked closely with and built stronger relationships with several affinity groups, including the Early Childhood Funders' Collaborative, Funders' Committee for Civic Participation, EITC Funders Network, Funders for a Just Economy, Forum of Regional Associations of Grantmakers, Grantmakers for Children, Youth and Families, Peace and Security Funders Group, and Workforce Matters.

GIST developed a logic model in 2013 to help guide its work. Our overall desired outcome is to improve grantmaking and amplify impact. We assess this by evaluating the following set of outcomes.

- **Network staff is attuned to and shapes GIST activities tied to field-wide concerns and member needs:** GIST staff worked to align programming with member interests and concerns through the creation of planning committees for events and individual outreach to members and partners.
- **Grow GIST membership:** GIST continues to maintain an average of 200 members, with specific members fluctuating in and out depending on the alignment of GIST work with member portfolios. Although membership has not grown much directly in numbers, new foundations participate in GIST every year and the loss of foundation representation has steadily declined.
- **Increase knowledge of issues and field trends:** High-profile grantmaker briefings and virtual webinars provide members with a wealth of information, resources, and ideas related to GIST's priority issues. Evaluations indicate participants are satisfied with event agendas and content, and intend to incorporate the information they learned in their grantmaking.
- **Increased knowledge of GIST member grantmaking:** GIST developed an online, interactive 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. There are 37 national networks and nearly 1,260 state policy and advocacy groups currently represented on the map. This tool is updated annually. To access this tool, visit <http://gistfunders.org/geographicmapping.php>.

- **Provide opportunities to network and build relationships:** GIST provided in person and virtual opportunities for networking and relationship building and has steadily increased its programming over the past three years.
- **Provide opportunities to collaborate:** Working groups are formed where appropriate to support continued connections and discussions. GIST staff supported five working groups in 2016: the Communications Collaborative, EITC Rapid Response Fund, GIST Mapping Project, Budget Working Group, and Funders Transition Strategy Room.
- **Provide opportunities to discuss grantmaking opportunities, strategies and lessons learned:** Meetings are designed to include a mix of presentations and discussions with leading national thinkers, practitioners, and advocates as well as grantmaker updates and strategy sessions. Working groups are formed as needed to provide opportunities for continued connections and discussions.
- **Provide opportunities to see linkages across individual issues:** As part of the GIST staff “glue” function, staff keeps abreast of areas of interest and giving among members and make connections among grantmakers pursuing similar objectives or working in similar regions.
- **Share information and learnings with grantees:** The GIST mapping tool is updated annually, posted on the GIST web site and shared with funders as well as grantees represented on the maps. Where appropriate, webinars are also opened to select grantees at the discretion of GIST members.