



## **2017 Annual Report Executive Summary**

GIST is an informal association of grantmakers from national, regional and local philanthropies that are active in improving the economic well-being of low-income families in the United States. It operates as an umbrella group for participating foundations, providing a forum for strategic discussion. Through meetings and other events, GIST helps grantmakers to:

- Deepen their understanding of the cross cutting issues of poverty and economic opportunity, support for low-wage workers, and adequate public resources;
- Keep abreast of policy developments, advocacy strategies, cutting-edge ideas and communications innovations that support effective grantmaking;
- Work collaboratively to support policies and program initiatives; and
- Strengthen philanthropic investments aimed at alleviating poverty and providing opportunity for all families to achieve economic stability.

Participation in GIST remained strong, with a total of 249 funders currently in the GIST network. GIST gained 47 new members in 2017, including representation from 18 new foundations or affinity group partners. GIST staff worked closely with the Steering Committee to plan and carry out several successful events that advanced GIST goals.

### ***Meetings and Events***

GIST held four meetings and eight webinars (where GIST staff had primary role in planning and implementation), reaching 550 grantmakers.

<b>Date</b>	<b>Event</b>	<b>Participants</b>
Jan 2017	GIST Teleconference: Funder Strategy Room Working Group	17
Mar 2017	GIST Meeting - Philanthropy's Response to Our Nation's High Stakes Budget and Tax Debates: 14th Annual Briefing and Strategy Discussion for Grantmakers	50
Mar 2017	GIST Meeting: Funder Strategy Room Working Group	29
June 2017	GIST Teleconference: Funder Strategy Room Working Group (2)	17
June 2017	Cosponsored Webinar: Digital Security in an Age of Hacking & Cyberthreats: What Grantmakers Should Know	175

August 2017	Cosponsored Webinar: What's Next in the Movement for Working Families: Opportunities for Offense and Building Power in the States	50
September 2017	Cosponsored Webinar: Families in the Balance: What does the Policy Debate Mean for Immigrant Families' Economic Security?	80
September 2017	Cosponsored Webinar: Winning the Budget and Tax Fights: New Messaging and Civic Engagement Strategies to Protect Working Families	25
October 2017	GIST Meeting: Philanthropy, Racial Equity and Fiscal Policy	60
October 2017	GIST Meeting: Funder Strategy Room Working Group	22
November 2017	GIST Webinar: When Worst Case Scenarios Become Reality: A Funders' Conversation on Opposition Attacks	25
<b>TOTAL</b>		<b>550</b>

GIST also cosponsored one meeting and twelve webinars led partner affinity groups (where GIST staff had primary promotion role). *Participation data not available for these events.*

<b>Date</b>	<b>Cosponsored Event</b>
Feb 2017	GCIR Monthly Immigration Policy Calls: Perspectives on Sanctuary Policies
Mar 2017	GCIR Monthly Immigration Policy Calls: What Does the Future Hold for Immigrant Workers and their Families?
Mar 2017	Funders' Briefing and Discussion: Organizing for Wall Street Accountability and Financial Reform
Apr 2017	GCIR Monthly Immigration Policy Calls: What is at Stake in the Global Refugee Crisis?
May 2017	GCIR Monthly Immigration Policy Calls: Recent Policy Developments and Their Impact
Jun 2017	GCIR Monthly Immigration Policy Calls: Trauma and Resilience: Supporting Immigrant Children, their Families, and Our Communities through Collaboration
July 2017	GCIR Monthly Immigration Policy Calls: July Immigration Policy Call
July 2017	FCCP Webinar: Countering State Preemption and Protecting the Power of Local Government
July 2017	FCCP Webinar: Census 2020: New Tools to Support a Fair + Accurate Count

October 2017	FCCP 2018 Election Series Webinar: The 2018 Elections and Nonpartisan Grantmaking
October 2017	GCIR Monthly Immigration Policy Calls: Fall Immigration Policy Changes: A Review for Funders
November 2017	FCCP 2018 Election Series Webinar: Voting Trends + Building Power in the AAPI Community
November 2017	FCCP Webinar: KEY 2020 CENSUS MILESTONES: Preparing to Invest in a Fair and Accurate Count

### *Working Groups*

GIST provides a neutral platform for funders to convene and has the capacity to staff and incubate working groups to provide opportunities for continued connections and discussions. In 2017, GIST provided staff support to five working groups.

- 1. EITC Fund (The Fund):** To help improve the efforts to protect current and create new state EITCs, the Grantmakers Income Security Taskforce (GIST) and the EITC Funders Network administer and oversee The EITC Rapid Response, Campaign and Policy Development Fund. The three funds are guided by an advisory group, supported by two national funders and administered by GIST and the EITC Funders Network in partnership with the Center on Budget and Policy Priorities (CBPP) and the Hatcher Group. In 2017, The Fund awarded \$105,000 in Rapid Response Funds to three states (HI, MI, and MT), \$150,000 in Campaign Funds to three states (MO, OK, WA), and \$450,000 in Policy Development Funds to four states (AR, GA, VA, WV). New state EITCs were enacted in MT and HI. National partners (CBPP and the Hatcher Group) provided TA to awardees and ensured tools and learnings from The Fund were widely shared and leveraged across states. A retrospective evaluation of the Rapid Response Fund was completed, and an evaluation of the Policy Development Fund is underway.
- 2. 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 39 national networks and nearly 1,382 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>.
- 3. 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 in response to the new policy environment. It is an invitation only working group with approximately 30 funders participating. In 2017, GIST staff facilitated two in-person meetings, three calls and a private listserv.

4. **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. This working group now operates primarily as a listserv, as communications programming has been integrated into the GIST workplan and for the GIST membership more broadly. This listserv remains active and is maintained by GIST staff. More than 600 messages were posted in 2017.
5. **Budget Working Group:** The Budget Working Group is a joint affinity group effort formed in March 2016 to bring 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. After hosting several events in 2016, the working group was able to meet its primary goals, but had run its course as an active working group. A private listserv was maintained in 2017 and leadership remain ready to pick things up should there be interest or demand from members.

### *Leadership*

GIST is led by a Steering Committee that provides oversight and guidance for the group. Steering Committee members are volunteers and represent the needs and interests of the diverse range of philanthropic organizations that participate in GIST. GIST staff facilitated monthly calls for Steering Committee members to plan GIST activities and an in-person Steering Committee meeting to review GIST's activities, accomplishments, finances, and membership, as well as discuss goals and activities for the coming year. In 2017 Kit Judge, The Annie E. Casey Foundation joined the Steering Committee and Lynda Parmely, Hagedorn Foundation left the Committee (Hagedorn closed its doors in late 2017). Current Steering Committee members include:

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

### *Lessons Learned*

Several important lessons have been learned in our administration of GIST this past year.

- **The importance of being flexible to adjust to new realities and help funders remain connected:** We have seen an increase in the demand for and value of our “glue” function as staff, to help members see linkages across individual issues and identify opportunities to collaborate. A new working group was formed in late 2016 – The Funder Strategy Room –to

allow 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 in response to the new political landscape. In 2017, GIST staff facilitated two in-person meetings, three calls and a private listserv, dedicating a considerable amount of time and resources to this working group prioritized by GIST leadership. This nimbleness is critical to meeting the needs of the network and made possible because of GIST's flexible structure (supported by general operating support grants and guided by a volunteer Steering Committee).

- **Bringing new voices to the table and growing the GIST network through the development of diverse planning committees and cosponsoring events with partner affinity groups.** This is a critical strategy that only seems to grow more important each year. Partnering with affinity groups can be time consuming, but we learn a lot from them and our work is stronger as a result. We will continue to leverage our membership with the United Philanthropy Forum to foster new and stronger collaborations with both national and regional philanthropy serving organizations.
- **The Annual Budget and Tax Briefing continues to be an anchor event for GIST,** now in its fifteenth year. Local viewing parties have been increasing in number and attendance since initiated in 2014 and offer a valuable way to expand participation and attract a larger and more diverse group of participants to the GIST network.
- **Providing opportunities for members to participate in different shapes and forms.** Listservs and webinars serve primarily as platforms for information sharing. In-person meetings remain critical for funder to funder networking and discussion and coordination as well as building trust and strong partnerships. Working groups provide opportunities for continued connections and conversations with like-minded funders. There is something for everyone, allowing members to participate at varying levels of engagement.
- **Understanding the importance of racial equity in our work.** GIST continues to seek opportunities to explore and discuss how racial equity work plays out in our institutions and our grantmaking. This year we dedicated our entire Fall meeting to this topic, experimenting with new session formats and strategies. The meeting was extremely well received, and we plan to continue to explore opportunities for embedding racial equity in our work.