

EITC Funders Network

2016 Annual Report

Since its inception of the EITC Funders Network in 2004, Nagle & Associates has provided staff and operational support for the Network. The Network aims to provide support and information to funders related to the EITC 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; be more informed about EITC and its benefits; and collaborate more effectively with each other and their grantees.

Steering Committee - Network staff works closely with Steering Committee members to identify critical issues in the field and programmatic opportunities for the Network. In 2016, the EITC Funders Network was guided by a steering committee comprised of:

- Elisa De La Vara, Arizona Community Foundation
- Marissa Guananja, W.K. Kellogg Foundation
- Patrick Hain, The Annie E. Casey Foundation
- Jennifer Lockwood-Shabat, Washington Area Women’s Foundation
- Kim McMillan, Foundation for the Mid South

Membership – Membership in the EITC Funders Network remained strong in 2016 with 301 members representing a total of 222 foundations, philanthropic advisory groups and affinity groups. We have members in 43 of the 50 states. Membership numbers have stayed relatively stable over the last few years. In December 2013, the Network had 272 members, representing 201 organizations and the numbers hovered around 300 for most 2014 and 2015.

EITC Funders Network Membership, 2014-2016

	2014	2015	2016
Total Membership at year-end	303	296	301
Foundations, advisory groups, and affinity groups represented	213	210	222
States represented	45	46	44*

Source: Constant Contact (as of 12/7/16). *2016 Missing states: Hawaii, New Mexico, Oregon, Rhode Island, Utah, Wyoming

Membership Survey - In April 2016, we conducted a membership survey to gather information on the general level of member satisfaction, feedback on Network services, and suggestions for future work. Thirty-five of the 296 Network members completed the survey, a response rate of 12 percent. Overarching themes from the survey results included:

- The majority of respondents are satisfied or very satisfied with the Network, overall. In terms of specific services, the highest satisfaction scores were awarded to email updates, the eNewsletters, and the webinars.
- Respondents noted the importance of linking the EITC to other asset-building initiatives and also framing conversations and resources specifically from the point of view of funders.
- Substantive knowledge and the dissemination of resources related to the EITC were named as primary strengths of the Network. More opportunities to network with other funders and sharing lessons learned were named as suggestions for moving forward.

Events (webinars) – Webinars provide a platform to disseminate information about emerging issues in the field and build partnerships. In 2016, the Network hosted four webinars. All four webinars were co-hosted with field partners (CBPP and TON) and sister affinity groups (AFN and WFN), which both deepened existing partnerships and created new relationships.

2016 EITC Funders Network Webinars

DATE	2016 EVENTS	REGISTRANTS
January 2016	Exploring Alternative EITC Payment Models (with AFN)	131
March 2016	Annual Policy Webinar (with CBPP)	46
April 2016	Women’s Economic Opportunity and the EITC (with WFN)	24
June 2016	Leveraging the Tax Moment to Build Financial Capability (with TON, JP Morgan Chase)	553
Total	4 webinars	754

Source: Constant Contact

It is difficult to tell a story with the webinar registration numbers except that numbers varied widely depending on the topic and co-host -- from 24 registrants for the WFN webinar to 553 registrants for the TON webinar. This has also been our experience in past years. For example, webinars co-hosted with the Asset Funders Network, which has a much bigger non-member outreach list, usually yield the largest registration numbers (131 in 2016 and 112 in 2014). The annual policy webinar may be a better marker for year-to-year comparison. In 2016, 46 people registered, up from 31 registrants the previous year, down from 74 in 2014.

Our evaluation response rate for webinars was low in 2016, similar to previous years. Of the four webinars we co-hosted, we coordinated evaluation follow-ups for two (WFN and AFN coordinated evaluations for the April and June webinars). We received 12 evaluation responses for the January webinar on alternative payments and 5 evaluation responses for the March policy webinar. On the whole, the feedback was positive.

For the periodic payment webinar, almost half of respondents (45 percent) said they were “extremely satisfied” with the webinar and the remaining 55 percent said they were “quite satisfied.” A majority of respondents (56 percent) said they strongly agreed that the webinar provided a better understanding of EITC period payment models; however, only 11 percent noted that they planned to incorporate this information into grantmaking strategies.

Of the five respondents who filled out the evaluation for the annual policy webinar in March, four of the five noted that they were “extremely satisfied” with the webinar and three of the five noted that they

are “extremely likely” to use the information in future programming. In the comments, information about messaging and local community strategies were cited as positive takeaways from the webinar.

Events (in-person meetings) – 2016 presented an opportunity to partner on two-in person meetings, which allowed us to bring topics to the field and moderate more in-depth discussions, deepen relationships with co-sponsoring partners, and introduce the Network to new members.

2016 EITC Funders Network In-Person Meetings

DATE	2016 IN-PERSON EVENTS	REGISTRANTS	EVALUATIONS
Sept. 2016	Savings, the EITC, and Financial Coaching (with AFN)	53	29
Nov. 2016	Advancing Opportunity for South Carolinians (with local partners)	35	20

Source: Constant Contact

[Savings, the EITC, and Financial Coaching](#): On September 28th, together with the Asset Funders Network, we hosted an opportunity for charitable foundations to explore the linkages between savings, the EITC, and financial coaching at the 2016 Assets Learning Conference in Washington, DC. Approximately one-third of registrants were EITC Funders Network members, about one-third were Asset Funders Network members, and one-third were new to both networks.

Evaluation results were positive overall: the average satisfaction rating was 4.1 on a 5 point scale (translating to “very good” to “excellent”). The topics discussed, the speakers, as well as the relevance to funders were highlighted as the most positive aspects of the meeting. More time for discussion and funder networking were both cited as potential ways to have improved the meeting.

[Advancing Opportunity for South Carolinians](#): We traveled to Columbia, SC on November 2nd to team up with the Greenville Partnership for Philanthropy, the South Carolina Grantmakers Network, the Sisters of Charity Foundation of South Carolina, and the United Way Association of South Carolina for a local funder conversation on the EITC. The full-day convening brought together funders, policy experts, and leaders in the field to talk about two-generation strategies and the role of tax credits. The majority of attendees were charitable foundation staff members followed by United Way staff members.

Evaluation results were very positive overall: the average satisfaction rating was 4.6 on a 5 point scale (translating to “very good” to “excellent”). The choice of speakers garnered a 4.8 rating. The majority of respondents stated that the meeting allowed them to acquire new information and tools for their work and all respondents stated that the meeting met the goals of providing a better understanding of the two-generation framework, of the role of tax credits, and of existing efforts to work to greater economic opportunity in South Carolina. Timeliness of the topics, the diversity of those represented in the room, and the speakers were all highlighted as being strengths of the meeting. More discussion and network time were both cited as ways the meeting could have been improved.

EITC Funders Network Website –We began analyzing data on user experience in 2015 and over the last two years have made changes to increase accessibility and made efforts to update content more frequently.

In 2016, we regularly updated website content in the issue areas, added blog posts on emerging topics and re-posted newsletter articles, and regularly posted information about upcoming events. We updated sliders to link to both events and news. In March, we switched to a new newsletter format, though continued to post a copy of the newsletter as well as the Q&A on the website. In October, we added video content to the “About” and “FAQ” pages. In December, we evaluated and refined several formatting issues.

The most visited pages in both 2015 and the first half of 2016, in addition to the homepage, were consistently the “event” and “newsletter” pages. In the second half of 2016, the most visited pages (in addition to the homepage) were the “event” and the “about” pages. This shift could be due to the fact that we highlighted the new content (videos) on the “about” page starting in October. Although few users engaged with the videos, the visits to both the “about” and “faq” pages (where the videos were hosted) increased after we posted the videos. Visits to the “newsletter” page decreased (perhaps due to the formatting shift), yet the “Q&A” articles had consistently high views throughout the year (24-35 unique views and 54 – 69 views overall).

The number of new visitors dropped over the course of 2016, but the number of returning visitors increased. In the first half of 2016 the site had 1,602 new visitors and 501 returning visitors. During the third and fourth quarters the number of new visitors dropped to 1,352, but number of returning visitors increased to 627. As is typical for us, returning visitors showed a much higher level of engagement - average session duration (over five minutes compared to half a minute) and pages per session (more than double). During the first half of the year, 152 users stayed an average of more than 3 minutes compared to the second half of the year during which 293 users stayed for this length of time. Average session duration increased by 63 percent over the last two years.

Time period	Number of unique visitors	Number of sessions	Avg. session duration	Pages/ session	% of first time visits	Bounce rate
January-June 2015	3,288	3,463	0:00:28	1.7	94.6%	79.0%
July-December 2015	3,617	4,069	0:01:01	1.8	88.6%	80.7%
January-June 2016	1,622	2,103	0:01:18	2.4	76.2%	70.6%
July-December 2016	1,364	1,979	0:02:07	2.7	68.3%	53.5%
Change since beginning of 2016	15.9% ↓	5.9% ↓	62.8% ↑	Similar	10.4% ↓	24.2% ↓

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 sister affinity group updates. Email engagement, overall, increased in 2016, both through an increased volume of event emails (we both hosted more events and participated in more intense outreach) and more regular alerts and updates. Open rates averaged about one in three for all types of emails, which was relatively stable compared to last year.

EITC Funders Network 2016 Email Engagement

	2014	2014 Average Open Rate	2015	2015 Average Open Rate	2016	2016 Average Open Rate
Total emails sent	18	30 percent	25	32 percent	41	34 percent
Event emails	12	37 percent	18	38 percent	30	37 percent
Newsletter emails	4	26 percent	4	25 percent	4	32 percent
Updates/Alerts	1	28 percent	3	33 percent	5	28 percent
Survey					2	37 percent

Source: Constant Contact

EITC Funders Network 2016 Email Alerts/Updates Open Rates

Date Sent	Alerts and Updates	Opens
11/4/16	Alert: EITC Refund Delay Messaging and ITIN Renewals	35% (96)
10/17/16	Alert: EITC Refund Delay	32% (88)
11/4/16	Update: EITC Funders Network Events	22.9% (70)
10/17/16	Update: EITC Funders Network Events	23.3% (65)
2/10/16	Update: EITC Funders Network Updates	28% (79)

Source: Constant Contact

eNewsletters – Each year we publish four eNewsletters that highlight emerging issues in the field and interviews with funders. 2016 eNewsletters included the following:

1. [March 2016 eNewsletter](#) featured Lana Wood of the Community Foundation of Greater Dubuque
2. [June 2016 eNewsletter](#) featured Steven Lee of the Robin Hood Foundation
3. [September 2016 eNewsletter](#) featured Tom Keith of the Sisters of Charity Foundation of South Carolina
4. [December 2015 eNewsletter](#) featured Robert Greenstein of the Center on Budget and Policy Priorities and Elizabeth Kneebone of the Brookings Institution

Newsletter open rates increased, on average, 7 percentage points from the previous year. Note that in March 2016 we introduced a new email-only format, which could have contributed to the increase. In June, we added a “friends” list to newsletter recipients (those who had asked to receive the newsletter, but are not funders), which increased the number of recipients.

EITC Funders Newsletter Open Rates, 2015-2016

2015 ENewsletters	Sent	Opens	2016 Enewsletters	Sent	Opens
December	12/3/15	28% (81)	December	12/7/16	33% (95)
September	9/2/15	26% (61)	September	9/6/16	34% (106)
June	6/11/15	20% (47)	June**	6/1/16	32% (103)**
March	3/3/15	19% (47)	March*	3/1/16	27% (75)*

Source: Constant Contact. Note that no all Enewsletter readers access the newsletter through the eblast. Newsletters can also be accessed directly from the website. *New email-only format **Added “friends of” list

Working in Partnership to Build the Field – Throughout 2016, the Network partnered with sister affinity groups on a number of fronts. Our work with the Asset Funders Network (AFN) during the past year has been geared toward programmatic opportunities at the intersection of asset building and the EITC. We co-sponsored a webinar on EITC periodic payments and worked closely together to co-sponsor an in-

person meeting at the ALC in Washington, DC. We have also cross-posted news and events with both AFN and Grantmakers Income Security Taskforce (GIST).

In 2016, we reached out to the Women's Funding Network to introduce our work and to discuss potential collaborations. We partnered in April on a webinar focused on Women and the EITC. Last year, we established a new partnership with Grantmakers Concerned with Immigrant and Refugees (GCIR). In 2016, we maintained this relationship with periodic check-ins and cross-posting opportunities around the ITIN renewal process.

We also continue to work closely with the Center for Budget and Policy Priorities, the Corporation for Enterprise Development (CFED), and especially the Taxpayer Opportunity Network (TON) and other national field leaders to stay abreast of field-wide concerns and strategize about building the capacity of funders to address emergent needs. Network staff has engaged in both individual conversations and participated in partner organizations' webinars and events to focus in on content areas of interest to funders, such as the connection between financial capability at tax time, proposals on periodic payment schedules, and the 2017 EITC refund delay.