

# EITC Funders Network

## 2016 Membership Survey Findings

The EITC Funders Network Survey was launched on April 5, 2016 and sent out to all 296 EITC Funders Network members. The survey was developed to gather information on the types of organizations that make up the Network, the general level of member satisfaction, feedback on Network services, and suggestions for future work. A similar membership survey was conducted in 2012 and trends over time are noted below where applicable.

### Overarching Themes:

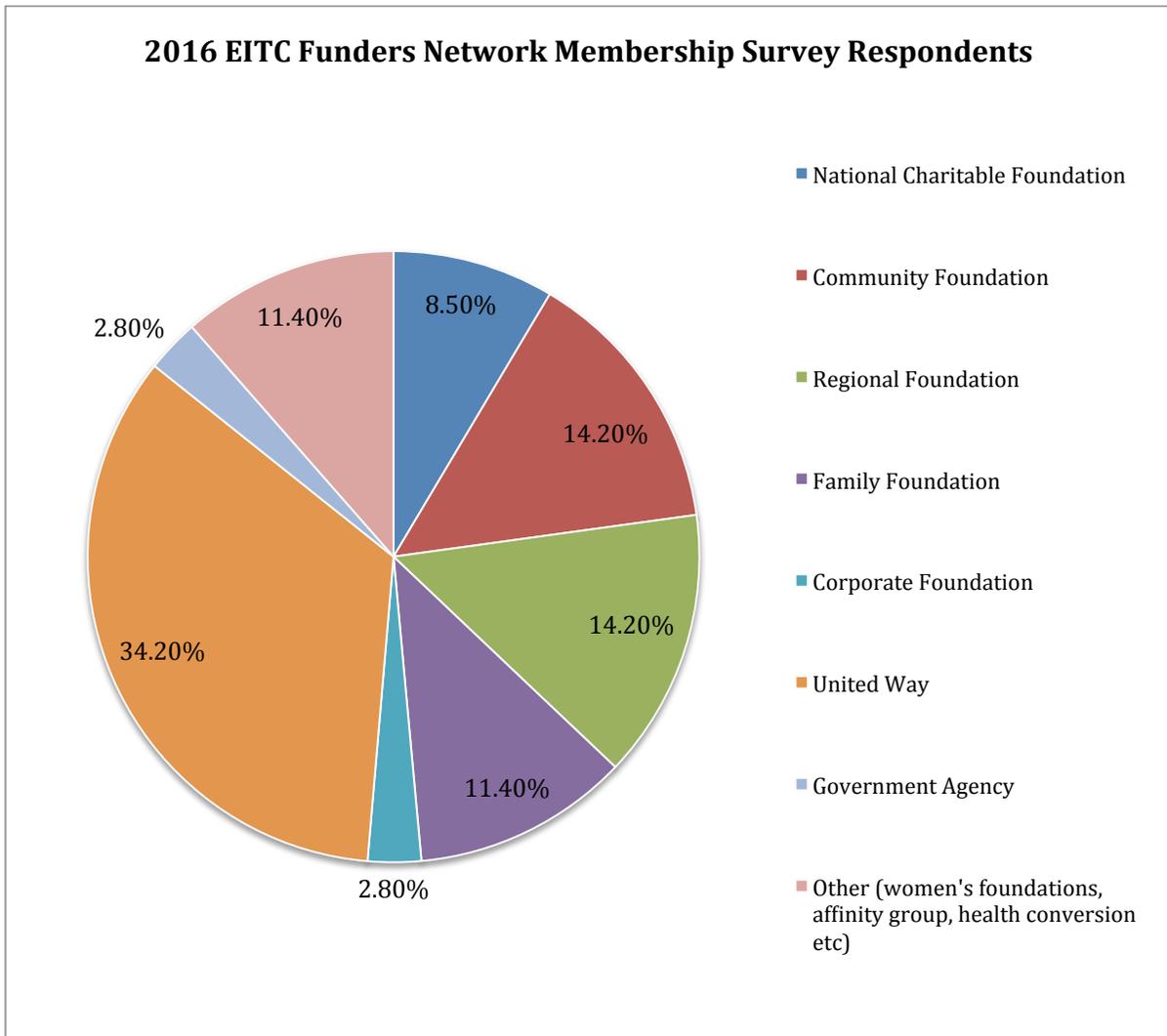
- The Network's membership is diverse; however, the majority of respondents noted that they provide local or state-specific support for EITC outreach efforts, free tax preparation, and programs that link the EITC to asset building. Most respondents represented organizations with EITC-related grantmaking under \$100,000 per year.
- 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.

**I. Survey participation:** Thirty-five (35) of the 296 EITC Funders Network members completed the survey, a response rate of 12 percent. The response rate is slightly higher than the 9 percent rate of the 2012 membership survey (there were also 296 members in 2012).

Representatives from a range of philanthropic entities participated in the survey (see figure one below). Most respondents represented organizations with annual EITC related-grantmaking under \$100,000 (75 percent), with one in three respondents working for organizations granting less than \$10,000 for EITC-related work. Respondents stated that their organizations supported EITC efforts on a local (73 percent); regional (43 percent); and national level (23 percent). In terms of activities supported, the majority of Network members (80 percent) fund EITC outreach, 71 fund provide free tax preparation, and 63 percent fund programs that link the EITC to asset building.

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### ***II. Funders Network Overall Satisfaction***

We asked survey respondents to tell us about their participation with the EITC Funders Network and levels of satisfaction with Network activities.

- Overall, the vast majority of respondents stated they were “satisfied” (40 percent) or “very satisfied” (40 percent) with the EITC Funders Network. The remaining respondents stated they were “neutral” on the topic. Overall satisfaction responses stayed relatively constant from 2012 when 55 percent stated they were “satisfied” and 36 percent stated they were “very satisfied.”

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- On a four-point satisfaction scale (1 = “very useful” to 4 = “not useful”). The response pattern tracked closely with the findings from the 2012 survey, except that “email updates” were added as an option to evaluate for 2016.
  - The highest satisfaction scores (1.5) was given to email updates
  - Newsletters, webinars, and the website each received a score of 1.8/1.9
  - The lowest satisfaction scores (2.4 and 2.5) were given to in-person meetings and individual assistance. This may be due to the fact that in-person meetings happen infrequently (about once every two years) and individual assistance is requested by only a small portion of members. Several comments reflected this reality, for example: *“I have not used in person meetings or individual assistance, but all other resources have been great!”*
- Comments on overall satisfaction included:
  - *The strength of the EITC Funders Network, when I get on average 3-4 emails a week about EITC already, is that it is framed toward our context as a foundation. I've found helpful links to programs/ideas/presentations that I can actually use with little adaptation.*
  - *The EITC FN will be more beneficial the more I learn about and take advantage of the information and resources available.*
  - *I think the focus on EITC is too narrow....*

### **III. Funders Network Services Satisfaction**

#### **a. Webinars**

About half of the respondents noted that they have participated in 1-3 webinars over the last year, only two respondents participated in 4-6 and the remaining respondents participated in no webinars in the last year. Of those who participated in the webinars, almost all said they were “satisfied” or “very satisfied.” As one respondent noted, *“Keep them coming!”*

Suggestions for improvement included:

- *More opportunities to engage with other funders and discuss leveraging support for EITC programs.*
- *Making sure that there's a section that talks about what foundations can do to support the work that is covered in the webinar.*
- *For our foundation, EITC is part of a broad spectrum of asset building provided by grantees, so it's hard to single it out as a strategy for us. If webinars connected EITC to other asset building that would be more useful for us.*
- *Schedule just prior to tax season for updates and shortly after for tips, best practices.*

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### b. Email Updates

We asked respondents about their satisfaction with the content and frequency of email updates. Of those who responded to this question (83 percent), most were “very satisfied” (52 percent) or “satisfied” (20 percent), with four answering that they were “neutral.”

Comments about the email updates included:

- *I really appreciate the links to the social media tools for EITC awareness week.*
- *I like the profiles of members.*

Suggestions for improvement included:

- *More case studies from foundations on lessons learned in funding EITC and related asset-building work. What worked? What did not work? What would funders do differently next time? Make it very practical.*

### c. eNewsletters

We asked respondents about their satisfaction with the content of the quarterly eNewsletter, including the featured “Interview with a Funder Colleague.” Most respondents were “very satisfied” (46 percent) or “satisfied” (14 percent). 17 percent noted they were neutral and only one respondent indicated being “somewhat dissatisfied.” Comments about the eNewsletters were limited, but included:

- *I've shared them with the organization that we fund and they've found them helpful as well.*

No suggestions for improvement were noted, but one respondent who had indicated feeling “neutral” about the eNewsletter stated: *I think I feel this way because of the large volume of email newsletters and snail mail newsletters I receive as a funder.*

### d. Website

We asked respondents which of the [eitcfundersnetwork.org](http://eitcfundersnetwork.org) content brings them to the website. The majority (70 percent) indicated the “research, news, and updates in the impact areas” brought them to the website. Webinar recordings, event announcements, newsletter archives were brought respondents to the website by 31 percent, 17 percent, and 14 percent, respectively. Twenty-eight (28) percent of respondents noted that they do not visit the website.

The email updates were once again cited as being the link to resources, even those on the website. As one respondent stated: *I mainly rely on email updates and don't visit the website very often.* Another respondent had positive interactions with the website, but notably, accessed the content via email links: *The website is well organized and easy to navigate. I've*

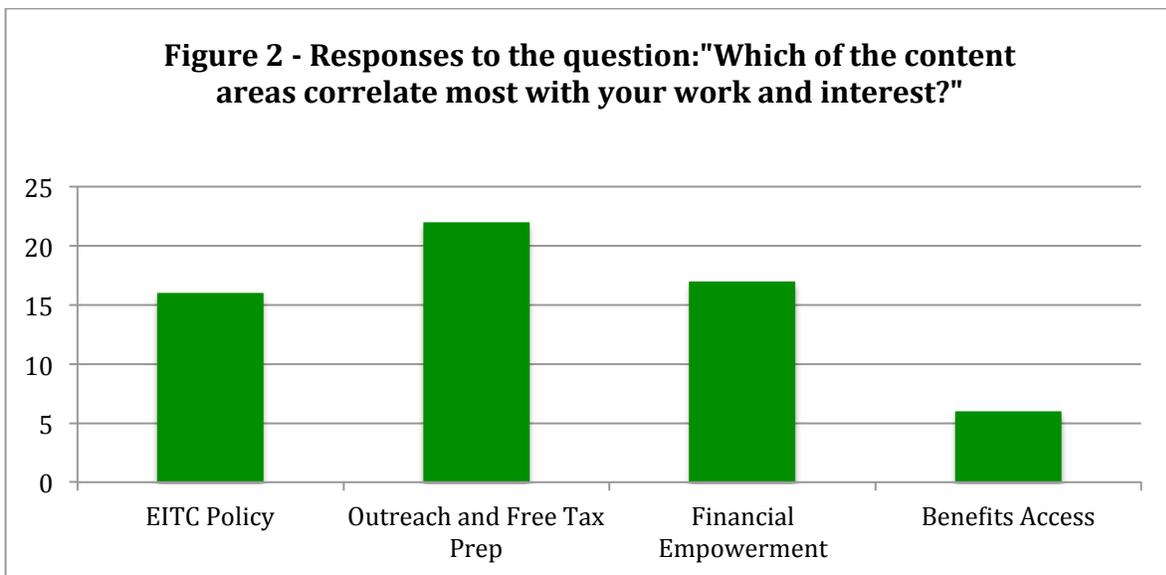
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*always been able to find what I was looking for. I access the website most often by clicking a link in an email.*

### IV. Substantive Content

The EITC Funders Network's work is organized around four substantive pillars: EITC Policy, Outreach and Free Tax Preparation, Financial Empowerment, and Benefits Access. When asked which of these substantive areas correlates most with respondents' work and interest, most respondents indicated Outreach and Free Tax Preparation as their primary intersection, followed by Financial Empowerment and EITC Policy (see figure 2).



Note that respondents were asked to select as many issue areas as apply.

Specific challenges or innovations in EITC Funding that respondents would like to see addressed included:

- *Successful strategies and tactics used in right-leaning states.*
- *Technology advances; behavioral economics learnings and EITC*
- *Volunteer recruitment and community outreach and education*
- *Some back to the basics about how to build an EITC collective impact strategy would be helpful. How can a foundation build an effective relationship with the United Way, Community Action Agency and other service providers?*

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### V. The Network

We asked respondents what they liked best about the EITC Funders Network and we also asked how the Network could better support respondents' EITC-related giving.

The responses to the former question tended to cluster around substantive knowledge and resources related to the EITC. For example, respondents noted that the Network is a “*place to find the information I need*” and provides “*research/policy expertise*” and “*resources we use for training and education.*” One respondent stated: *It's a new area of funding for us, so I'm learning a lot. The network, especially the website, has been a great resource.*

Suggestions for future services also focused primarily on resources. As one respondent stated: *Keep the practical resources coming!* Some respondents provided suggestions for specific types of resources, for example:

- *It would be good to know what is happening with the local EITC networks around the country. Are they functioning well? Are they funded?*
- *New products aimed at EITC grantees, that funders can share with our grantees -- products that help grantees improve their work in this space in practical, low-cost ways.*
- *I don't know if you offer evaluation tools to our grantees, but having access to those would be helpful.*