

IMPACT REPORT

JANUARY 1, 2021 – JUNE 30, 2022





Advocacy
Coalition Building



Outreach
Training
CalEITC4Me



Community Building
Grantmaking
Upward Project

Golden State Opportunity mobilizes people to change the systems that perpetuate poverty by creating a community based movement while connecting low-income people with resources to build financial well-being.

LETTER FROM AMY

Friend,

The last 18 months have been like no other. Our country has faced so much: from an ongoing pandemic and a new administration to a volatile economy and reprehensible Supreme Court decisions. Amid so much uncertainty, families are still struggling to pay rent, put food on the table, and keep the lights on.

These challenges have revealed the stark disparities in our country, and how wholly unequipped—and unwilling—our current system is to create opportunity and end poverty.

This is why GSO is urgently laying the groundwork for political transformation. The system does not work and will not change without a catalyst for decisive and effective action. The change our communities seek and need is only possible with community power that holds leaders accountable.

To accomplish our ambitious goal, we're investing in PeopleFile, a new collaborative database that can share, analyze, and connect the people we serve. And we expanded our \$1M Community Connect program to create a stronger network of organizations supporting low-income workers.

We're also working at the state and federal levels to create and shape policies that lift up everyone.

It all comes down to this: *We will become so strong and so loud they can't ignore us.*

We hope you are inspired, encouraged, and mobilized by our progress. Join us in the fight to connect low-income families and individuals with local, trusted organizations while demanding an equitable nation for all.

In Solidarity,



Amy Everitt
President, GSO

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POLICY



Child Tax Credit

In 2021, the expanded Child Tax Credit provided monthly per child payments to families as part of a series of landmark policies. The payments reduced income volatility, allowed families to make the best decisions for their children, and cut the number of children living in poverty by 30%.¹

Leveraging Golden State Opportunity's expertise in multi-channel, multicultural outreach campaigns that build awareness and deliver results for anti-poverty tax credits like the California Earned Income Tax Credit, leaders in Washington D.C. looked to GSO to improve federal agency and national partner outreach efforts to ensure families claim their expanded Child Tax Credit.

Our team shaped the White House's messaging, enrollment tools and outreach strategy to ensure it was culturally and linguistically appropriate and resonated with low-income communities. We also partnered with

both Speaker Nancy Pelosi and Senator Alex Padilla to raise awareness about this historic financial support available for parents.

Unfortunately, the payments ended in December 2021 when our political system failed to put people first and our elected officials failed to pass President Biden's Build Back Better plan. The negative consequences were immediate: 3.7 million more children lived in poverty in January 2022. Nearly half of families who received the credit say they can't afford enough food. The Child Tax Credit proved that we can fight and end child poverty with direct cash.

We continue to work with legislators, policy partners and supporters to demand the continuation of the expanded Child Tax Credit and that Congress put the focus of the child tax credit where it belongs: on the children.

¹ "Child Tax Credit." Columbia University Center on Poverty and Social Policy. <https://www.povertycenter.columbia.edu/child-tax-credit> (2022).



Golden State Stimulus: GSO Takes the Reins

If there's one thing that GSO knows, it's how to connect millions of the hardest-to-reach Californians with tax credits. That's why, when the pandemic was starting its second year, Governor Gavin Newsom trusted us as one of the main organizations to lead a multi-channel, culturally-relevant education and outreach campaign for the largest state cashback program—the Golden State Stimulus.

We urgently began sharing information online and through our partners, but there was one problem: we needed to raise and spend \$2 million within four months. With so much at stake, we moved quickly and secured a \$1 million bridge loan from Open Road Alliance, a funder that helps social organizations respond quickly to unexpected policy

changes and funding gaps. Open Road Alliance saw that we had an opportunity to help Californians get money at a critical time and issued the loan allowing GSO to move forward with no delays.

We also secured another \$1 million in creative financing by partnering with the California Community Foundation and Nonprofit Financing Fund. With funding in place, GSO led a comprehensive statewide campaign that resulted in 8.4M households claiming \$9B.

**8.4M households
\$9B claimed**



EDUCATION



ELEVATING VOICES TO END POVERTY



As part of GSO's efforts to lift up our Community Connect partners, GSO hosted online and in person storytelling trainings across the state, teaching our partners the basics of how to collect and use stories from their communities and from within their own organizations.



Gathering and telling personal stories has helped us as an organization to build trust for our Community Connect program and builds momentum for the work taking place in communities throughout California. Sharing stories helps give community members vibrant examples of self-sufficiency and self-worth.

STATEWIDE SUCCESS STORIES



JOSEFINA, LOS ANGELES

Josefina is a single mother of a two-year old daughter with special needs. When the pandemic started, she had no one to help take care of her daughter. She had to quit her job in order to take care of her. She didn't think she qualified for tax credits without earned income.

Eastmont Community Center VITA helped her use her income from 2020 to obtain a \$5,000 tax refund – money she used to pay for rent and home expenses.

PROOF
8/11/22

STATEWIDE SUCCESS STORIES



ALEX, RIVERSIDE

Alex* is a former foster youth who was experiencing homelessness and couch surfing in Riverside. They came to our Community Connect grantee John Burton Advocates for Youth (JBAY) for support with housing and got connected to free tax preparation. JBAY helped them file their taxes to claim a missing stimulus check and tax credits. Alex used their tax return as proof of income for a housing application that was due that same week. Our work with Alex helped them receive a large tax refund but also connected them with the housing assistance they needed.

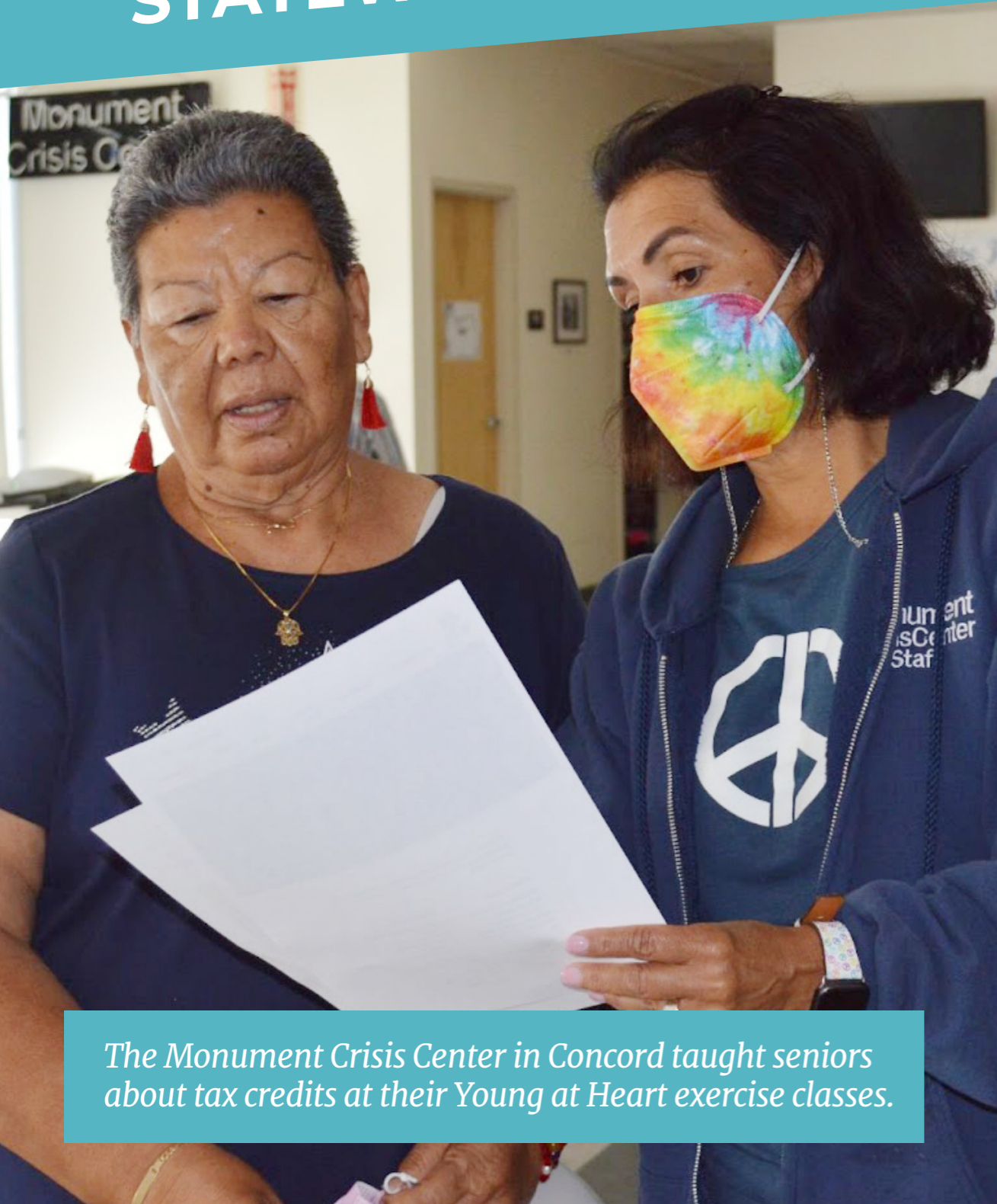


DANIELLE, SHASTA

Danielle is a single mother of four and Teacher's Assistant who heard about Jefferson Economic Development Institute (JEDI) VITA through a co-worker. With the help of JEDI's "kind and overwhelmingly helpful" volunteers, Danielle filed her taxes for free. She is now saving her tax refund for a down payment on a new van.

*Names have been changed

STATEWIDE SUCCESS STORIES



The Monument Crisis Center in Concord taught seniors about tax credits at their Young at Heart exercise classes.

ESTHER, SAN MATEO

Esther* is a young mother who faced housing insecurity in San Jose. After filing her taxes with the help of Bill Wilson Center VITA, she plans to use her tax refund to buy a more reliable car for her and her son.

SARA, SAN BERNARDINO

Sara* came to Family Assistance Program VITA after already paying for a tax preparer. VITA staff noticed that Sara's son was not listed on the tax return and she hadn't claimed the CalEITC. They helped her amend her taxes and receive an additional \$2,300 from her tax return.

*Names have been changed

OUTREACH & ACTION

**47,155,255
IMPRESSIONS**



**PEER-TO-PEER
TEXTING**

1.6M 2021
1.7M 2022
43 VOLUNTEERS



**EMAIL
CAMPAIGN**

63,955 DELIVERED
23,255 OPENS
2,542 CLICKS



MEDIA

2M SOCIAL MEDIA
12M RADIO
12M WEB ADS
132K PRINT
4M TV

TAX CREDIT CALCULATOR

450,000+ PAGE VIEWS



COMMUNITY CONNECT

Community Connect launched in January 2022 to support local grantees with on-the-ground tax preparation, outreach and education and to amplify personal stories to help change the systems that perpetuate poverty.

This \$1.2M program works with dozens of nonprofits across the state, including Central City Neighborhood Partners (CCNP), an IRS-certified Volunteer Income Tax Assistance (VITA) site that provides dozens of vital free services to low-income families including free tax preparation and Individual Taxpayer Identification Number

\$1,200,000
to 37 Non Profit
Organizations

application support. An integral part of Community Connect, CCNP hosted nearly 100 events, assisted with over 900 tax returns, and educated over 21,000 people about the CalEITC in 2022 alone.

Then, with GSO support, CCNP Executive Director Margarita Alvarez Gomez provided powerful testimony to California State Senators in support of year-round funding for tax education and outreach. CCNP's Sandra Bonneville also advocated for the state's low-income families at a Los Angeles press conference with Assemblyman Miguel Santiago and the CalEITC Coalition.

Community Connect voices like those at CCNP are invaluable in our work to transform public policy and build collective power together.



ORGANIZING



Engaging ITIN Holders

For too long, only people with Social Security Numbers could qualify for the CalEITC and YCTC, even though hundreds of thousands of immigrants work, pay taxes, and earn less than \$30,000 each year.

Thanks to years of advocacy led by the CalEITC Coalition and immigrant groups, the law was finally changed to make the CalEITC include people who file their taxes with an Individual Taxpayer Identification Number (ITIN), including undocumented immigrants.

Because federal financial support for COVID-19 (including stimulus payments and unemployment insurance) excluded immigrants, GSO knew it was imperative to get the word out about the new eligibility requirements.

For the past two tax filing seasons, we distributed Spanish and Chinese language ads about the ITIN expansion online, on the radio, and on TV. We also worked with our partners across the state to expand our outreach and connect with people who could now qualify to explain the benefits of filing taxes.

Total Claims

	2022*	2021
EITC	\$660,263,470	\$787,124,208
YCTC	\$331,517,240	\$355,135,875

ITIN Filers

	2022*	2021
EITC	\$69,888,783	\$66,137,894
YCTC	\$29,724,295	\$29,557,745

*Reported through July 18

Data Systems Investment and PeopleFile

As part of our mission to build community power, GSO is investing in new data infrastructure to make both grassroots organizing and resource delivery easier for our partners and much more efficient.

We found that many of our Community Connect partners lacked comprehensive databases to connect their constituents with available services. Instead, key data and contact information were kept in a variety of places and irregularly updated. Data sharing was rare and extremely difficult.

To help address this urgent need, we launched PeopleFile, a new pilot program to enhance our network's ability to reach and provide services in low-income communities.



Built from the ground up, this database helps connect people with a wide range of services from free tax preparation and financial education to housing and CalFresh. PeopleFile also encourages data sharing among our partners to increase their effectiveness and collaboration. Following our successful pilot, we plan to expand PeopleFile to all our Community Connect partners to further support their communities with available resources and information.



Upward Project Connects Dallas Residents with Free Tax Preparation

In 2022, we launched Upward Project, a nine-month pilot program in Dallas, Texas designed to test our education and outreach model in a city marked by unequal growth and one of the largest racial wealth gaps in the country.

The goal: establish partnerships and relationships with trusted sources to encourage individuals and families to file their taxes and claim federal credits like the Child Tax Credit and the Earned Income Tax Credit, putting thousands of dollars back in their pockets.

One of our first successes was securing paid accountants and tax preparers to be in the schools, community centers, and churches that low-income communities in Dallas trust most. Next steps include more canvassing, more outreach and more tax preparation appointments.

Upward Project is scheduling appointments and will provide powerful insights that will shape and inform our efforts moving forward.

Participants received an average refund of **\$3,500** per family.

**Make your gift today.
Together, we will put an end to poverty.**

GoldenStateOpportunity.org/Donate

345 California Street #600
San Francisco, CA 94104

- ✓ Make a monthly gift to support GSO throughout the year
- ✓ Use a credit card or check to make your contribution
- ✓ Participate in your company's matching program
- ✓ Transfer stock to GSO

For more information, please contact Kristina Stewart, Major Gifts Officer, at kristina@goldenstateopportunity.org

Your donation will help Golden State Opportunity continue to:

- 1. Provide the tools to build financial well-being to lift individuals and families out of poverty.**
- 2. Advocate at the state and federal levels for policies that help low-income families.**
- 3. Connect individuals with other public benefits to help them remain housed, fed, and healthy.**

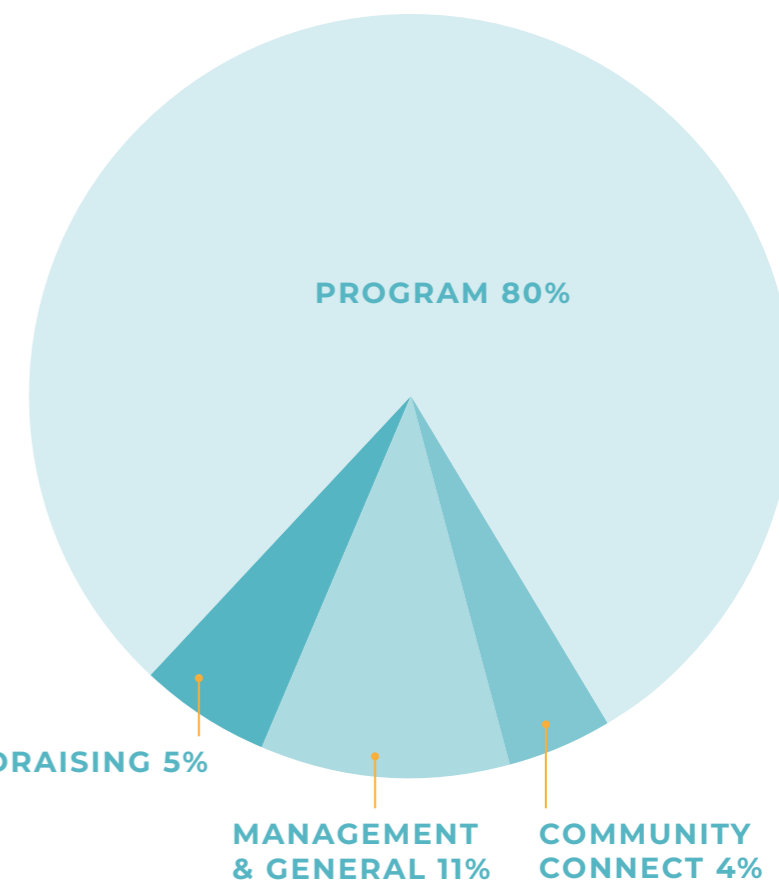
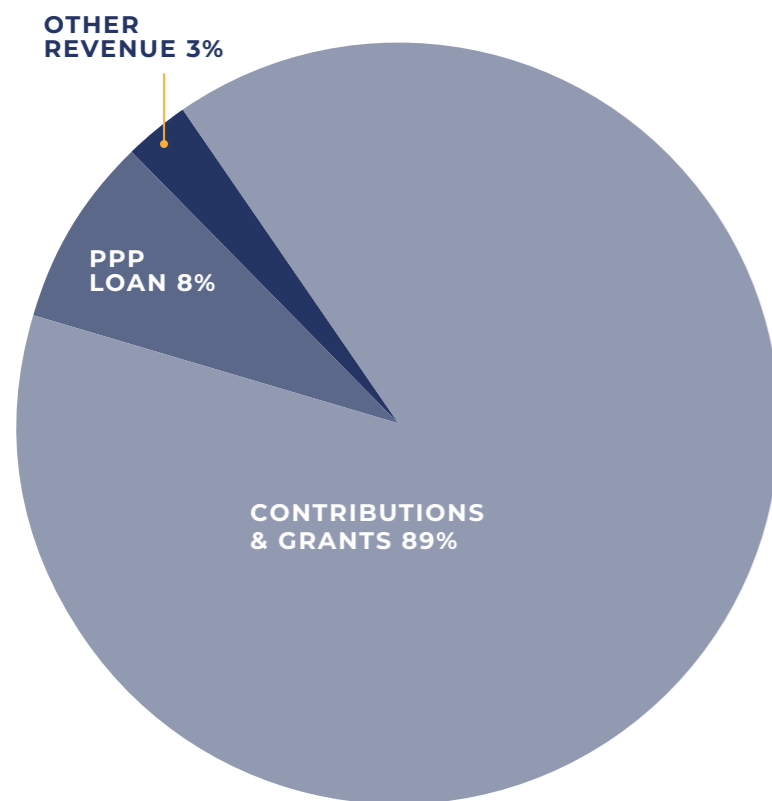
STATEMENT OF FINANCIAL POSITION

2021 REVENUE

Contributions & Grants	\$4,910,838
PPP Loan	\$450,367
Other Revenue	\$139,359
Total Revenue	5,500,564

2021 EXPENSES

Program	\$4,360,832
Community Connect Grants Program	\$233,235*
Management & General	\$576,336
Fundraising	\$302,088
Total	\$5,472,391
Net Surplus	\$28,173



*Due to a change in grant cycles, \$1M+ in community connects grants typically provided in November/December were made in January 2022

FUNDERS

Lorielyn Agcaoili
Katie Albright
Armanino Foundation
Ballmer Group
Bank of America
Blue Shield of California Foundation
Karen Boots
Ari Breakstone
California Community Foundation
California Department of Community
Services & Development
The California Wellness Foundation
Laura Capps
Panha Rith Chan
Chan Zuckerberg Initiative
Jinye Chen
Barbara Coll
Wynne Segal Dubovoy
John Dumey
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Walter & Elise Haas Fund
Hellman Foundation
Marla Hess
Intuit Financial Freedom Foundation
Kevin Jennings
Kaiser Permanente
Barry Kallander
James Kelly
Veronica LaTorres
T. June & Simon K.C. Li Charitable Fund
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Phoenix La'Mar Williams