



## 2020 IMPACT REPORT



# OUR MISSION

Golden State Opportunity (GSO)  
is a nonprofit **dedicated to ending poverty**  
by providing all Californians with the tools to  
build financial well-being and thrive.

## LETTER FROM GSO PRESIDENT

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It's a new year, and could any of us be happier to have 2020 in the rear view mirror?

Despite the challenges of running a statewide outreach program during a pandemic, the GSO team and our partners got it done, helping make sure that 6.2 million Californians benefitted from the CalEITC, putting more \$1.1 billion in their pockets, which helped both families and local economies.

Building on what we learned and looking to make sure all newly CalEITC-eligible Californians claim their credit for 2020, we worked with our new media partner to conduct research into the best messages and communications channels for our outreach. We conducted a listening tour with organizational partners and ran focus groups in English and Spanish with EITC-eligible people. What we learned will inform our work, making it even more effective.

With our 2021 CalEITC4Me program, we are planning additional outreach programs focused on education and health clinic partners. But we aren't stopping there. We have an ambitious plan to end poverty. At GSO, we believe that everyone in America should be able to afford life's basic needs, and we are crafting a strategic plan to ensure that belief becomes reality.

We look forward to telling you more about our plan and enlisting your support for it in the coming months.

A handwritten signature in black ink that reads "Amy Everitt". The signature is fluid and cursive, written in a professional style.

**AMY EVERITT**  
GOLDEN STATE OPPORTUNITY PRESIDENT





**GSO team** prepares and launches outreach campaign with community-based organization partners.

# 2020 PIVOT

Million **4** Billion

GSO launches  
**#Million4Billion**

11,000 person-to-person phone calls made to lower income Californians.

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

**JANUARY 31 - FEBRUARY 8**  
Governor Newsom proclaims  
**CalEITC Awareness Week**

Covid pandemic shelter at home orders go into effect. GSO team plans a pivot to a digital forward campaign and adds a COVID-19 resource page to its website. This resource page ensured that CalEITC4Me could serve as a clearinghouse for helpful information for low-income workers and their families, highlighting the full spectrum of programs and services that exist to help Californians stay healthy, safe and financially stable throughout the ongoing COVID-19 pandemic.

# 2020 PIVOT

Governor Newsom signs bill expanding the CalEITC to ITIN holders into law.

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

## SUMMER

GSO holds Tele Town Halls with Board of Equalization Member Malia M. Cohen focused on reaching the rural communities in her district; Assemblywoman Christy Smith, whose district includes parts of Ventura and Los Angeles counties; and Stockton Mayor Michael Tubbs.

**FALL**  
The GSO team begins planning for 2021. In addition to adding programmatic work focused on schools and health clinic partnerships, in-depth messaging work with organizational partners and the communities GSO serves is undertaken.



Leading up to the 2020 tax filing deadline, GSO coordinates a final outreach push, including a texting program that reached 2.1 million Californians in 2020.



*Million 4 a Billion*

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*#Million4Billion*

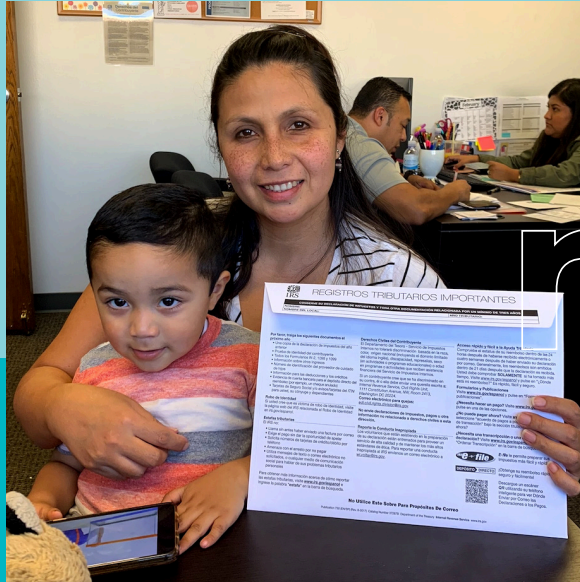
**More than 6.2 million people in  
3.8 million households claimed \$1.1 billion!**

When the COVID-19 pandemic shelter orders hit in March, the outreach plan for GSO and its partners had to pivot to a digital forward campaign, minimizing in-person events and meetings, and “Million 4 a Billion” -- #Million4Billion -- was born. The campaign objective remained the same: help Californians safely access \$1 billion in refundable tax credits through the CalEITC and the state’s new Young Child Tax Credit (YCTC). To meet this goal, we set out to reach at least one million likely eligible

workers with timely information on how the CalEITC could help put cash back in their pockets, as well as how to file their taxes from home for free.

Working with our partners, we called, texted, and ran media campaigns to reach those eligible workers. The program was a success! By the time of the final tax filing deadline of October 15th, 3.8 million households claimed \$1.1 billion from the CalEITC and YCTC and billions more from the federal EITC!





# my EITC

**Gloria Saucedo**, a parts inspector at a local factory, learned she will receive a refund of several thousand dollars thanks to the CalEITC, YCTC and federal EITC. Prior to the pandemic, she planned to put that money in a 529 college savings account for her 2-year-old son.



## OUR FAIR SHARE REPORT

GSO wanted to dive a bit deeper into the data to show how EITC dollars have an overwhelmingly positive impact on California's economy, so we enlisted economist Andrew Chang to do an extensive analysis. Using economic multipliers from the US Bureau of Economic Analysis, Chang and his team found that the combined impact of federal and state EITC refunds created or sustained 74,000 jobs in California in 2019, equivalent to nearly 25% of the total new jobs California created that same year! EITC refunds were also responsible for close to \$4 billion in earnings and \$14 billion in total economic activity -- or nearly two times the amount of EITC dollars claimed by low-income workers in the state. They also found that these refunds poured \$219 million back into the state's general fund.

And while this is a huge economic benefit, Chang's analysis revealed that California isn't getting its fair share of federal EITC refunds. The state represents 12% of the US population and 15% of the United States GDP, yet only receives 10% of federal EITCs. That's why GSO's outreach work is critical. Since California created its own EITC and organizations like ours began educating the public to help them claim it, California has drawn down \$400 million more in federal EITC dollars than before these outreach programs did their work.

# 74,000

jobs created or sustained in  
2019 due to the federal and  
state EITC refunds

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# \$4 Billion

in earnings and \$14 billion in  
total economic activity

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# \$219 million

back into the state's  
general fund



## CENSUS WORK

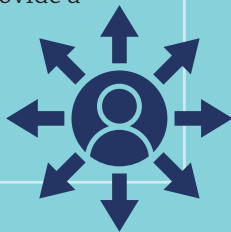


An accurate census is critically important to ensure that every Californian receives the care and services that they need. The results of the 2020 Census will directly impact our state's most vulnerable individuals for the next ten years as the count informs the amount of funding the government puts into public benefit programs in each county across the state. GSO put its core competency of connecting with hard-to-reach communities to work to help make sure every Californian was counted. We partnered with organizations throughout the state to enlist our extensive experience running a multi-layered outreach and education campaign using sophisticated targeting strategies to reach those "Hard to Count" (HTC) populations. We are proud that our work contributed to a 69.6% response rate statewide, including a 75.8% response rate in Alameda County.

## ITIN EXPANSION

After years of dedicated advocacy by GSO and a coalition of partner organizations, the 2021 state budget extended the CalEITC to all income-eligible workers with Individual Taxpayer Identification Numbers (ITINs). Undocumented workers who are required to pay taxes do so with an ITIN.

While GSO will continue to advocate to include even more workers and families in the CalEITC, this was a significant step for California and could provide a financial boost to roughly 600,000 people if our efforts to reach them with the information are successful.



## 2020 Intuit Award

GSO was proud to be recognized by the Intuit Financial Freedom Foundation in September with its inaugural Tax Time Allies ACE Award. The GSO team was recognized for developing a virtual coaching assistance program to help Californians prepare their own tax returns, most for the first time in their lives, and also for the #Million4Billion outreach campaign.



# ITIN EXPANSION

## PARTNER PROFILES



**The Bresee Foundation** has grown a lot since its founding in 1982 as a drop-in tutoring program in South Los Angeles. Today, Bresee takes a holistic approach to breaking the cycle of poverty through robust afterschool programs, family case management, and gang reduction and youth development. Bresee teamed up with Golden State Opportunity to provide tax education and information about free tax preparation ahead of tax season. "The pandemic presented many challenges, but we've been fortunate to serve 2200 families through home visits and our Wilshire FamilySource Center," said Bresee Associate Executive Director Ana Grande. "Our partnership with GSO helps to make sure that families are able to understand Earned Income Tax Credits and use them to stabilize their financial well-being during this difficult time."



COACHELLA VALLEY  
Community Tax Services

**Coachella Valley Tax Services (CVTS)** began as a Volunteer Income Tax Assistance (VITA) site in 2016. Although the area is known for its glitzy public concerts, about 39% of Coachella Valley residents live in poverty. CVTS provides free tax preparation and tax education to Coachella's seniors and low-income residents. In 2019, it doubled the number of tax returns they filed in the Coachella Valley at four tax sites across the region: the Coachella Library building, California State University San Bernardino Palm Desert Campus, College of the Desert-Indio, and La Quinta Wellness Center.



CENTRAL VALLEY  
PARTNERSHIP

**The Central Valley Partnership (CVP)** is a multiracial, multigeneration network that brings grassroots community and labor groups together to work on common issues and uplift the Central Valley. It provides candidate training, research on local issues, and nonpartisan voter outreach in hard-to-reach and disenfranchised communities. CVP is working with Golden State Opportunity to train college students, including many DACA recipients, to educate the local Latino community about Earned Income Tax Credits. "This vital partnership allows us to help vulnerable Central Valley families, and now undocumented workers, to access financial relief after an extremely tough year," said CVP Board President Dillon Savory.



## OUR IMPACT IN OUR COMMUNITIES

**STATEWIDE**  
**3,847,093** CalEITC Claims\*  
Totalling: **\$1,124,612,659**

**SANTA CLARA COUNTY**  
**108,592** CalEITC Claims\*  
Totalling: **\$24,827,67**

**REMAINING BAY AREA**  
**341,532** CalEITC Claims\*  
Totalling: **\$84,940,988**

**SAN MATEO COUNTY**  
**39,517** CalEITC Claims\*  
Totalling: **\$8,305,845**

**STANISLAUS COUNTY**  
**59,466** CalEITC Claims\*  
Totalling: **\$21,659,490**

**LOS ANGELES COUNTY**  
**1,110,920** CalEITC Claims\*  
Totalling: **\$303,274,400**

**SAN JOAQUIN COUNTY**  
**77,486** CalEITC Claims\*  
Totalling: **\$27,673,997**

**SAN BERNARDINO COUNTY**  
**252,275** CalEITC Claims\*  
Totalling: **\$87,103,198**

**RIVERSIDE COUNTY**  
**258,423** CalEITC Claims\*  
Totalling: **\$83,292,088**

\*Includes both the CalEITC & YCTC

## OUR **IMPACT** IN NUMBERS



\$1.1B

Amount of CalEITC and YCTC money put back into the pockets of working families and individuals in 2020.

6.2M

Number of people who benefitted from the CalEITC in 2020, including nearly two million children.

40+

Number of community partners across California.



# Thank you to our generous supporters.

*We could not do our work without you!*

Linda Ach

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