



The Economic Progress Institute

Strategic Plan 2018-2021

Approved
Board of Directors
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Table of Contents

Mission and Vision	2
Core Values.....	2
Theory of Change and Logic Model.....	3
Rhode Island Socio-Economic Conditions	5
Three-year Policy Objectives.....	7
Related Program Investments.....	7
Critical Operations Issues.....	8
Operations Capacity Investments	8
Year One Investment Priorities	8

Strategic Plan 2018-2021

MISSION

The Economic Progress Institute, a nonpartisan research and policy organization, advocates for policies that improve economic security and opportunity for Rhode Islanders.

VISION

- Our state's vibrant economy and skilled workforce attracts and retains jobs that enable Rhode Islanders to support themselves and their families.
- Government and residents share responsibility for ensuring that all Rhode Islanders, especially low-wage workers and those who cannot work, are able to meet their basic needs.
- An effective, efficient and well-funded public sector provides vital services to Rhode Island residents.
- Our state's tax structure is fair and adequate.

CORE VALUES

Integrity

The Economic Progress Institute is committed to using objective and thorough approaches to its work while adhering to high standards and accountability. The Institute produces credible and knowledge-based materials and information.

Equity

The Economic Progress Institute is committed to ensuring all Rhode Islanders, with their rich diversity, have access to economic resources, opportunities and public services to grow and reach their full potential. We engage in strategies to achieve a shared prosperity.

Excellence

The Economic Progress Institute is an adaptive organization committed to work of the highest quality. We work collaboratively and proactively to develop strategies and partnership to address economic and social inequities. Our practices include time for reflection, discussion and identification of limitations to ensure our work meets the highest professional standards.

Active democracy

The Economic Progress Institute provides information and opportunities for all Rhode Islanders, especially those who often don't have a seat at the table, to actively participate in public debate and decision-making. We bring passionate leadership and involvement to the issues about which we care.

THEORY OF CHANGE AND LOGIC MODEL

The logic model on the following page outlines the goals, beliefs and strategies that underpin our work to improve economic security and opportunity for low- and modest-income Rhode Islanders.

The Institute works from the premise that government plays a critical role in ensuring that all state residents can at least meet their most basic needs and should create opportunities for upward mobility.

The Institute employs three key strategies to achieve our goal of economic security and opportunity:

1. **Research:** We provide data-driven analysis to inform state policy debates and scrutinize proposals to determine how they will affect every-day Rhode Islanders.
2. **Educate:** We put our analysis and information into the hands of policymakers, journalists, community partners, and concerned citizens to promote debate based on facts. We also educate community-based organizations about the government resources available to help Rhode Islanders meet their basic needs.
3. **Advocate:** We use our data to influence legislative and budgetary decisions. We bring together Rhode Islanders from diverse backgrounds to empower them to influence the choices being made throughout government or at the State House.

Throughout its work, the Institute employs a racial justice lens to ensure that systemic inequities affecting communities of color are addressed.

The policy areas on which the Institute focuses are:

- Work and family supports
- Workforce development
- Tax and budget policy

Core Assumptions	Theory of Change	Strategies	Immediate Outcomes	Impact
<ul style="list-style-type: none"> • Policy makers world views influence and may limit their understanding of the economic conditions of low- and moderate-income residents. • Facts should drive policy and spending priorities. • Policy makers can be influenced by data-driven analysis. • When advocates have access to data, they have more power to influence policy makers. • Educating the media and advocates is essential to amplify the influence of our research and advocacy 	<ul style="list-style-type: none"> • Through research, education and advocacy, influence government to make better informed decisions and to take action to enhance economic security and opportunity. 	<ul style="list-style-type: none"> • Produce data-driven research to inform action. • Empower advocates within government or the community with research/facts. • Persuade policy makers, directly or in community coalitions, to advance good policy and stop bad policy. • Employ a racial equity lens to ensure that systemic inequities affecting communities of color are addressed. 	<ul style="list-style-type: none"> • Legislation and regulations create the necessary conditions to achieve our desired outcomes. • Rhode Island government has the revenues to pay for what is needed to advance the economic progress of its residents. 	<ul style="list-style-type: none"> • All state residents can meet their basic needs and have pathways to upward mobility. • Rhode Island has a vibrant economy, skilled workforce, & jobs that enable its residents to support themselves and their families. • The public sector is effective, efficient, and well-funded to provide vital services to its resident. • Rhode Island has a fair and adequate tax structure.

Policy makers = Legislative and executive branch

RHODE ISLAND SOCIO-ECONOMIC CONDITIONS

- Since the end of the recession, the overall economy in Rhode Island has improved with the unemployment rate now at 4.5%. However, not all Rhode Islanders have seen improved employment with the unemployment rates for Blacks (8.1%) and Latinx (7.5%) nearly twice that for Whites (4.2%).
- In 2016, 130,000 Rhode Islanders (12.8% of the population) were living in poverty. Poverty rates for people of color were much higher than for White Rhode Islanders (9.6%), with 22.4% of Blacks; 21.9% of Latinx and 13.2% of Asians living in poverty.
- Wealth and income inequality are at the highest point since the early 1980s and will likely accelerate given changes to US tax policy beginning January 2018.
- Raising a family in Rhode Island is expensive.¹ It costs a single parent family \$52,932 and a two-parent family \$58,054 to raise a toddler and a school-aged child. It costs a single adult \$20,500 to meet his or her basic needs.
- Many Rhode Island households do not earn enough to make ends meet. More than one in three (36%) single adults earn less than the amount required by the Rhode Island Standard of Need (RISN); nearly three-quarters (72%) of single parent families fall short, as do a quarter (26%) of two-parent families.²
- 20.3% of all jobs in Rhode Island are low-wage.³ Better-paying jobs require at least two years post-secondary education or highly skilled trades.
- Close to 82,000 Rhode Islanders, 14% of Rhode Island's working age population, do not have a high school diploma or equivalent. More than one in three Latinx and one in five Blacks do not have a high school credential compared to just one in ten Whites.
- More than half (58%) of Rhode Island adults have a high school credential, an associate's degree or some college experience. Almost 30% have a bachelors' degree or higher. Attainment of a bachelor or graduate degree is much lower among Black and Latinx than among Whites.
- Around 35,000 working age adults (4.81%) have limited English language skills, the majority of whom are native Spanish speakers.
- The historic and systemic marginalization of communities of color is a critical factor in perpetuating racial and ethnic disparities.
- Due to changes in federal and state policy and funding, the current system of work supports (child care, health care, SNAP, Earned Income Tax Credits) is highly vulnerable.

¹ The 2016 Rhode Island Standard of Need

² IBID.

³ Prosperity Now 2018 Scorecard



- Federally antipathy to the Affordable Care Act and Medicaid, as well as rising costs for health insurance threaten access to health care for low- and moderate-income Rhode Islanders and access to long term care services for low-income seniors and people with disabilities.
- The current political climate presents challenges and opportunities. Increasingly open hostility toward people of color, immigrants, and especially undocumented residents, threatens the economic security of and opportunity for these populations and our community as a whole. Coordinated community response offers the potential for advancing policy and building long lasting partnerships to further economic justice.
- Like most states, Rhode Island consistently faces deficits and struggles to balance its budget, especially given the current anti-tax climate.

THREE YEAR POLICY OBJECTIVES

The Economic Progress Institute's three-year objectives include:

1. **Ensure Rhode Island state government has the resources it needs to make public investments and adopt policies that bring broadly shared prosperity—through an accountable budget process.** With the extremely skewed distribution of the federal tax cuts, there is opportunity to create a more progressive state tax structure.
2. **Protect and enhance public support programs that help low- and modest-income Rhode Islanders.** These programs include but are not limited to affordable health insurance and child care, tax credits for working families, cash assistance, SNAP, and child support.
3. **Advocate for policies, programs and protections that enable workers to earn a living that provides opportunity and economic security.** This includes having a strong workforce development system that meets the needs of lower skilled Rhode Islanders, labor standards that support family friendly work places (paid family leave, paid sick leave, fair scheduling) and an adequate minimum wage.
4. **Make progress toward eliminating economic disparities for communities of color.** The Institute will continue to highlight disparities in its reports and fact sheets and will highlight systemic and historical reasons for these disparities and propose solutions to enable economic security across race, ethnicity and class.

RELATED PROGRAM INVESTMENTS

1. **More research capacity to go deeper on need and opportunity.** With additional staff capacity, the Institute will provide more research and analysis to support advocates and policy makers and inform the public debate. We will continue to explore and invite partnerships with universities and other institutions to expand community knowledge.
2. **Increase visibility and persuasive power of our and partner communications.** With training and support from our national partners, the Institute will refine messaging as needed and intensify outreach efforts, including those targeted at key influencers, and more communications tailored for the general public.
3. **Increase presence and influence at the State House.** We will explore capacity needed to enable our leadership to strengthen relationships with members of the General Assembly and increase the value of our research and policy recommendations.

CRITICAL OPERATIONS ISSUES

- In a small shop like ours, succession planning is needed for all staff and board leadership. In particular, we need to replace within five years the expertise of our co-founder and policy director in preparation for her retirement.
- The Institute, like many policy and non-profit sector infrastructure organizations, is dependent on institutional funders and concerned about its ability to withstand the loss of even one large funder.
- With a commitment to ensuring a stronger focus on disparities in communities of color, the board and staff recognize their need for cultural competency development and the need for increased diversity among staff and aboard.

OPERATIONS CAPACITY INVESTMENTS

1. Complete emergency and planned departure succession plans for critical staff to retain institutional knowledge and ensure smooth operation during transitions.
2. Increase fund development capacity to increase individual and institutional giving.
3. Invest in human resource practices throughout the Institute that advance our commitment to equity, diversity and inclusion.
4. Add communications capacity to enable a broader reach and more public influence.
5. Align board work with the strategic plan objectives, including diversifying board composition, building a stronger leadership pipeline, maximizing director talents, and regularly assessing board performance to ensure adaptive responses to our evolving needs.
6. Expand staff capacity for our proactive advocacy agenda.

YEAR ONE INVESTMENT PRIORITIES

- Continue the longstanding work of the Institute.
- Raise the additional funds needed to increase staff capacity.
- With funding received, recruit and hire a junior policy staff member.
- Create a task force and develop succession plans for key staff and board positions.
- Conduct comprehensive communications needs assessment.
- Begin training to enhance equity, diversity and inclusion practices.