

Qvisory

The RF has funded Qvisory, a nonprofit online advocacy organization to develop and distribute health, savings, and debt products to support the economic security needs of young Americans between the ages of 18 to 34.

Criterion Ventures

The Rockefeller Foundation has provided funding to Criterion Ventures and its partners to analyze the growing crisis of medical debt, explore solutions, and draw up a detailed strategy to implement changes. Building on the examples of micro-credit, and student loans, Criterion Ventures will convene hospitals, patient advocacy groups, government representatives and financial service providers to develop a solution that connects people in need of capital to broader capital markets in a way that protects low- and moderate-income people.

Towers Perrin

The Rockefeller Foundation has provided funding to Towers Perrin, a major consulting professional services firm, to undertake a four-phased gap analysis that will result in a set of product recommendations to address economic security of American workers. Towers Perrin will segment the market of low- and moderate-income workers and match these market segments against existing and possible retirement, savings, and health products.

Building Savings & Short-Term Resilience

Doorways to Dreams (D2D)

The Rockefeller Foundation is funding D2D to conduct a 32-site demonstration at tax preparation sites in 2008 to demonstrate demand for savings bonds among low- or middle-income filers. Savings bonds are credible, accessible and liquid, have low minimums and no fees. They also offer higher returns than bank accounts and other financial products with similar levels of risk, making them ideal savings instruments for low-income workers and families.

New America Foundation

The Rockefeller Foundation is also supporting the New America Foundation in implementing the first phase of its Autosave project at five employer sites. Autosave is an automatic payroll deduction savings program for American workers. The New America Foundation will provide technical assistance to employers and other implementation partners and conduct qualitative research instruments for conducting on-site evaluation.

Rockefeller Economic Security Index (RESI)

The Rockefeller Foundation is supporting a team of economists and political scientists, led by Professor Jacob Hacker of Yale University, to develop the Rockefeller Economic Security Index. This index will build on the best existing research to define the dimensions of economic security, and will provide an

authoritative source that illustrates both how and in what respects economic security varies over time and across social groups.

Ariel Education Initiative

The Rockefeller Foundation will support the Ariel Education Initiative to conduct a study of 401(k) participation and contribution rates by race among employees of America's top corporations. The study will focus on Fortune 500 companies, targeting those with strong minority populations, with a goal of at least 10% participation or 50 companies. Data on 401(k) participation from the 50 large companies would provide a statistically valid study that will help inform a national policy discussion on the respective roles of employers and government in encouraging individuals to save for retirement.

High Wire: The Precarious Financial Lives of American Families by Peter Gosselin

The Rockefeller Foundation has funded L.A. Times reporter, Peter Gosselin, to conduct research and publish a book on economic security titled, High Wire: The Precarious Financial Lives of American Families. Gosselin's thesis is that a crucial and largely unappreciated trend of the last 25 years has been the substantial shift of economic risk from business and government to working families, up and down the income ladder.

Public Radio International (PRI)

The Rockefeller Foundation has funded Public Radio International, which provides content to 800 radio stations nationwide that together draw an audience of more than 30 million people, to build its capacity and coverage of economic security concerns within the U.S. workforce. The aim is to help America's agenda-setters and thought leaders gain a more nuanced understanding of the interrelated issues affecting economic security.

Urban Institute-Brookings Institution Tax Policy Center

The Rockefeller Foundation is funding the Urban Institute-Brookings Institution Tax Policy Center to develop an integrated analysis of how various policies and proposals impact the larger system of retirement security available to older Americans. As part of their grant, the Tax Policy Center will model the effects of various proposals for Social Security reform and private pension systems, with a particular emphasis on the distributional impacts of these proposals. The Center will also analyze the combined impact of current government healthcare policies and various retirement income programs on retirement security.

Georgetown University Retirement Security Project (RSP)

The Rockefeller Foundation has funded the Brookings-Georgetown Retirement Security Project— which is widely credited with the development of the auto-401(k) provisions of the 2006 Pension Protection Act— to conduct research to evaluate the demand-and supply-side barriers within the annuities market, to explore the feasibility of conducting a study designed to understand retirement planning and

annuitization decisions, and to develop strategies for expanding predictable, guaranteed lifetime income for future retirees.

The Rockefeller Foundation is also supporting the Brookings-Georgetown Retirement Security Project to undertake research, development and outreach related to its proposal for an automatic-IRA, an initiative to expand dramatically retirement savings in the United States by reaching the vast majority of the 78 million Americans who work for employers that do not offer a retirement plan.

Economic Policy Institute (EPI)

The Rockefeller Foundation has funded EPI and Professor Teresa Ghilarducci of The New School to develop and situation-model a plan for Guaranteed Retirement Accounts (GRAs). The plan consists of a mandatory retirement savings account, to be funded equally by employees and employers that, when combined with Social Security, would ensure that all Americans had an income replacement rate of at least 70% in retirement. The impact of the mandatory contributions on low-income workers would be offset by a refundable tax credit financed through the reduction in current tax subsidies for a 401(k) and IRA accounts.

The Rockefeller Foundation is also supporting EPI to undertake research, policy analysis and a robust plan for the dissemination of information related to economic security issues for working families—including health care, retirement security, and economic inequality. This research will improve policymakers' understanding of how different policies and policy alternatives affect working families' income, wage, employment status and other indicators of wellbeing.

National Academy of Social Insurance (NASI)

The Rockefeller Foundation has funded the creation of a program at NASI that will fund innovative research proposals on ways to strengthen Social Security to ensure greater economic security for American workers, particularly vulnerable populations such as elderly widows and groups at high risk of disability. This grant builds on the Rockefeller Foundation's legacy of involvement in the creation of the Social Security Administration in 1935. The Foundation played a key role in promoting and conducting the research required to inform Franklin D. Roosevelt's administration on social insurance policy.

Women's Institute for a Secure Retirement (WISER)

The Rockefeller Foundation has funded WISER, in collaboration with African-American and Latina community partners, to conduct retirement education programs for low- and moderate-income working women to help ensure their greater economic security in retirement. Specifically, WISER's education programs have three components: direct constituent education; leadership training; and training of trainers. Rockefeller funded WISER to undertake these activities in conjunction with two partners: Mothers' Voices Georgia and MANA, a national Latina organization.

Building Savings & Short-Term Resilience

National Employment Law Project (NELP) The Rockefeller Foundation is funding NELP's Unemployment Insurance (UI) Safety Net Project to raise awareness of UI reform and educate policymakers about the importance of unemployment insurance for low-income workers that may become unemployed. In addition to a regular series of analyses and reports documenting the latest unemployment trends, NELP will launch a major national survey of unemployed workers, detailing the everyday hardships of unemployment in today's economy. NELP will also produce a 'blueprint' of important UI reforms for the Treasury Department.

New America Foundation

The Rockefeller Foundation is supporting the New America Foundation's Next Social Contract initiative, an integrated program of research, meetings, and publications designed to address the economic insecurity of American workers and promote broad-based sustainable economic recovery through changing public policy.

Georgetown Center on Poverty, Inequality and Public Policy

The Rockefeller Foundation is funding the Georgetown Center on Poverty, Inequality, and Public Policy to simulate and analyze alternative approaches for expanding the Earned Income Tax Credit (EITC) for childless adults and non-custodial parents, and to develop recommendations for the most effective components of such an expansion.

National Women's Law Center (NWLC) The Rockefeller Foundation is supporting the National Women's Law Center to conduct an analysis of the impacts of fiscal policy reforms on low-income women and families. The analysis will focus on the Earned Income Tax Credit, Child and Dependent Care Tax Credit, and the Child Tax Credit. NWLC will work with a series of coalition partners to disseminate the findings to policymakers.

Center for Economic Progress (CEP)

The Rockefeller Foundation is supporting the Center for Economic Progress to develop a comprehensive federal savings policy agenda, informed by on-the-ground learnings from tax preparation pilots across the country, to address the needs of low-and moderate-income workers.

Center for Working Families (CWF)

The Rockefeller Foundation is supporting CWF to undertake the Green Jobs/Green Homes New York project, which will retrofit one million residential homes, create 30,000 jobs in New York State, reduce energy use and climate impacts, lower energy bills, and serve as a blueprint for other state initiatives around the country.

Expanding Access to Health Care

National Council of La Raza (NCLR)

The RF will fund NCLR to conduct an analysis of major healthcare reform proposals, evaluating their impact on different segments of the Latino community. NCLR will examine the impact of both individual and employer mandates on Latino workers and their families. Limited data is available on the impact of these proposals on many communities, given that they have been sparsely implemented. NCLR will also identify channels of access to the health care system for uninsured Latinos and investigate the core criteria that are needed to improve the quality of healthcare for Latinos.