



SURVEY OF COALITION PARTICIPANTS

March 2022

[Google doc version is here.](#)

WHAT: ATF conducted an anonymous survey soliciting feedback from core national organizations who are members of the ATF coalition. This survey asked participants to evaluate ATF's work including our successes, leadership of the coalition, and the effectiveness of messaging work, lobbying, materials that ATF produces, coalition meetings, etc. The survey also asked participants to reflect on areas that could be improved, as well as priorities for ATF work in 2022.

WHO: 54 individuals completed the survey. While the responses were anonymous, we are aware of at least 40 organizations represented in the results, including:

American Federation of Government Employees

AFL-CIO

AFSCME

American Federation of Teachers

Blue Haven Initiative

Build Back Together

Center for American Progress

Center on Budget & Policy Priorities

Coalition on Human Needs

Communications Workers of America

Daily Kos

Economic Policy Institute

FACT Coalition

Friends Coalition on National Legislation

First Focus

Groundwork Collaborative

Health Care for America Now

Indivisible

Institute for Policy Studies

Institute on Taxation & Economic Policy

Main Street Alliance

MoveOn

National Education Association

National Women's Law Center

NETWORK

NYU Tax Law Center

Our Revolution

Oxfam

Patriotic Millionaires

Progressive Change Campaign Committee

Public Citizen

Responsible Wealth

RESULTS

SEIU

Take on Wall Street

Tax March

Teamsters

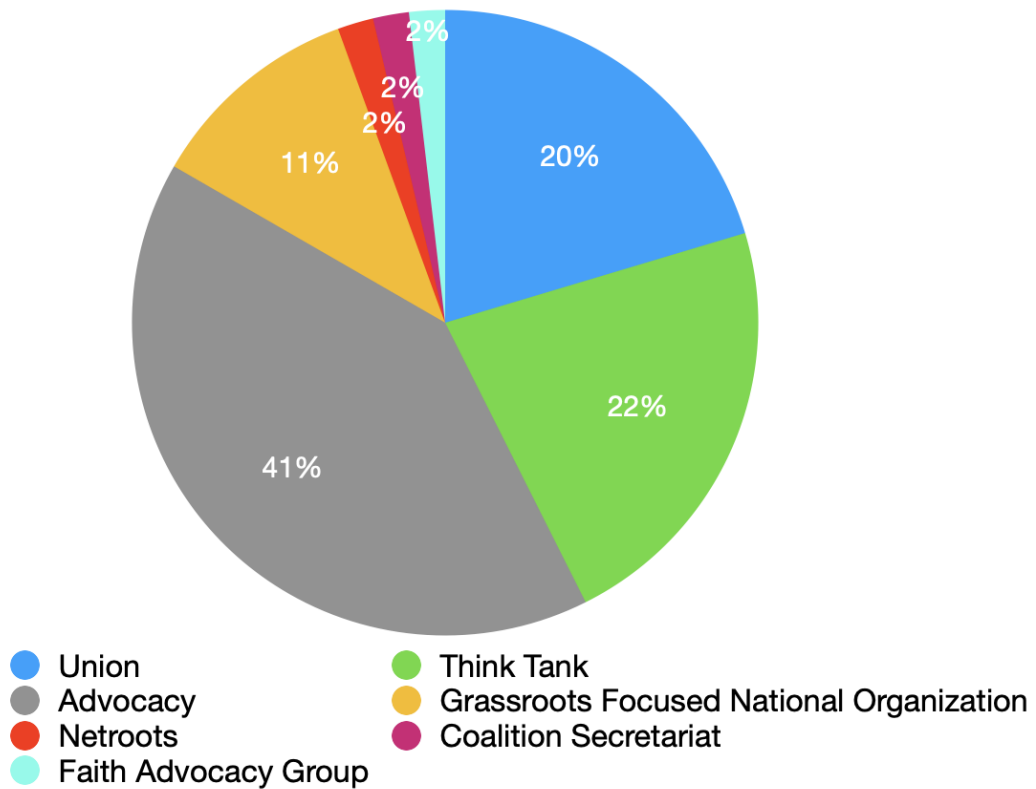
Voices for Progress

Washington Center for Equitable Growth

Women's March

KEY TAKEAWAYS: ATF is a very well-respected institution that effectively focuses a range of organizations on tax fairness issues. ATF is broadly seen as most helpful at providing strategic direction to the coalition, shaping the tax fairness message and pushing for tax reform legislation such as the Build Back Better Act and the Billionaires Income Tax. Recommended improvements included broadening the coalition to include more organizations with a strong field presence and elevating racial justice issues in ATF’s work.

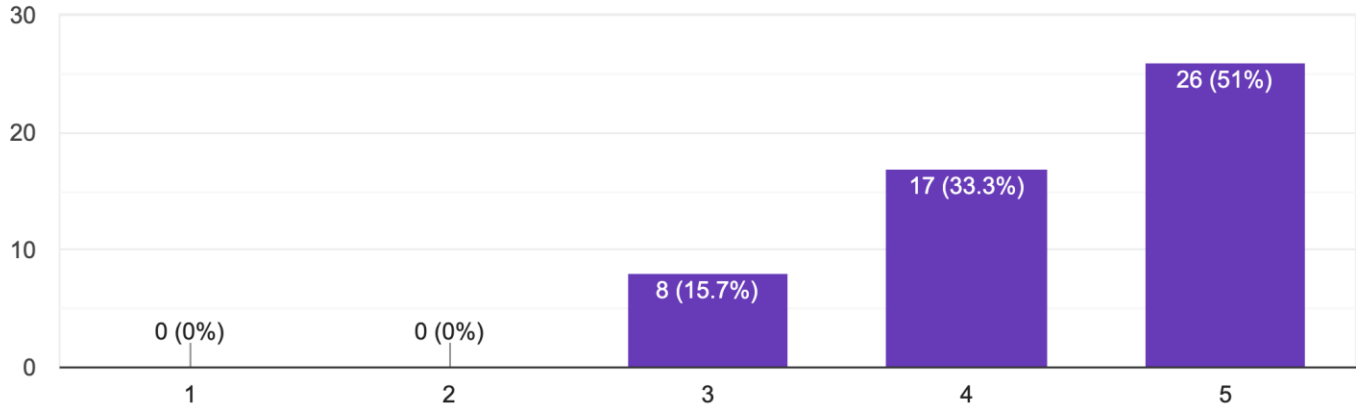
What Type of Organization Do You Work For
54 results



GENERAL ATF EVALUATION

As a coalition and staff, ATF conducts four major types of activities in pursuit of our goals. For those activities that you are familiar with, please rank how well ATF performs: leading and coordinating the ATF coalition.

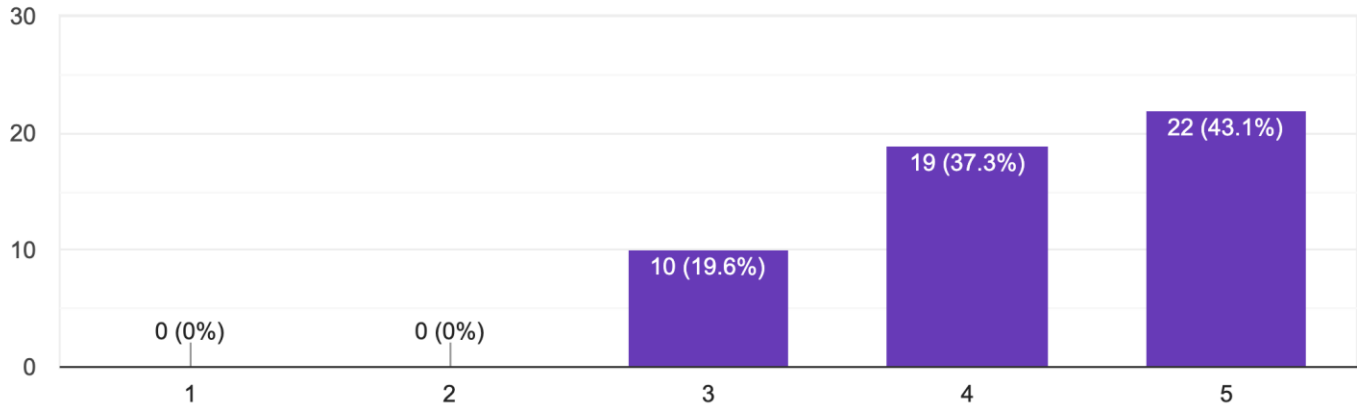
51 responses



84% rated a 4 or 5

On a scale of 1 to 5, with 1 being not very well and 5 being very well, please rank how well ATF performs: Leading and coordinating lobbying activities in Congress.

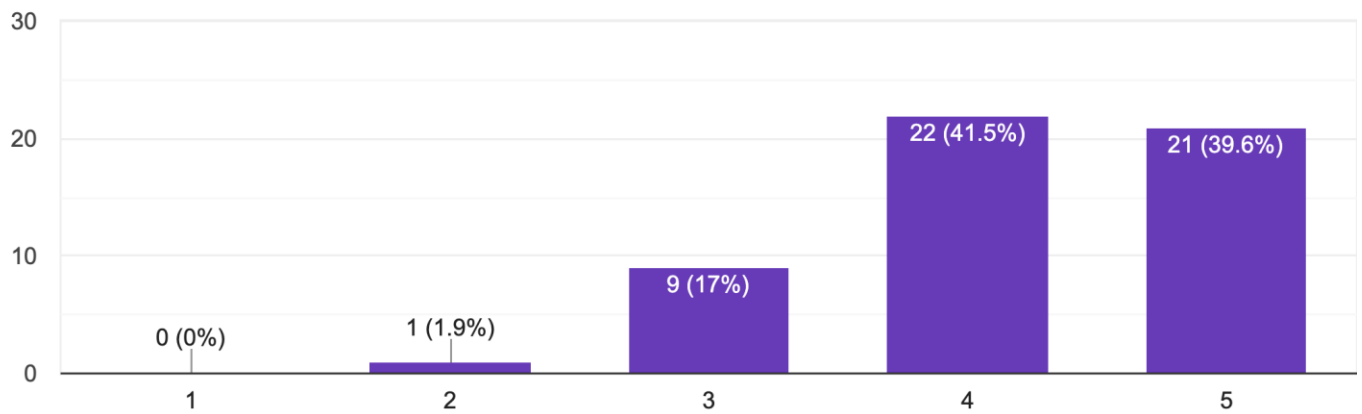
51 responses



80% rated a 4 or 5

On a scale of 1 to 5, with 1 being not very well and 5 being very well, please rank how well ATF performs: Influencing the debate over tax policies and their outcomes.

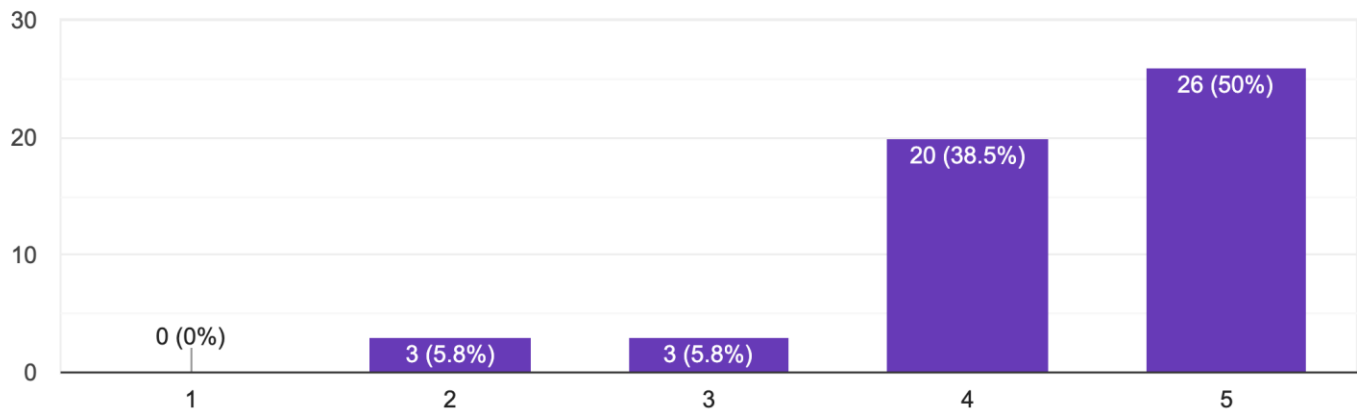
53 responses



81% rated a 4 or 5

On a scale of 1 to 5, with 1 being not very well and 5 being very well, please rank how well ATF performs: Shaping/driving the message on tax issue...olling, talking points and digital communications.

52 responses



89% rated a 4 or 5

What do you consider to be the ATF coalition’s biggest successes or wins in 2021?

The responses to this primarily fell in three categories with the strongest being ATF’s strength with messaging (19 responses mentioned messaging) followed by “maintaining tax reform as a core component of federal negotiations on BBBA” (18 responses mentioned ATF’s influence on the BBBA), and ATF’s successful push for the Billionaires Income Tax (10 responses mentioned the BIT). A sample of representative responses is below.

“Getting a great set of priorities into BBB, keeping allies aligned and informed, keeping the pressure up and keeping taxes in the news”

“There was a strong effort to influence debate in favor of taxing the very wealthy who aren't currently taxed on large amounts of their income. This message was very effective in changing debate in the media and on the Hill and influencing members (even if the House-passed BBBA failed to include much in this area). A few years ago moderate Democrats would not have embraced a proposal like the Billionaires' Income Tax, but ATF's messaging helped make that possible this year.”

“The administration and the vast majority of the Democratic caucus has adopted messaging that could be right out of an ATF talking points document.”

“I think us assembling that big menu of revenue options and bringing people together to think them out has been very helpful. I also think ATF played a pretty important role in putting the stock buyback tax on the table. Given Sinema's resistance to the most obvious tax increases, having almost \$2 trillion in offsets that all Dems seem to agree on is an important accomplishment. And it speaks to the importance of having a big menu. ATF has also been very helpful in backing the tax enforcement agenda.”

What do you consider to be the ATF coalition's biggest failures or disappointments in 2021 (other than the failure, so far, to enact BBBA)?

While there was broad consensus on ATF's successes, ATF's failures or disappointments were far more varied. A common response was disappointment at BBBA's lack of passage, although most responses clarified that they did not hold ATF responsible for that. Several respondents also commented on their frustration at reaching moderate members and specifically the obstruction of Manchin and Sinema. Following that, five responses indicated that ATF could do a better job focusing on racial justice, four were disappointed by losing stepped-up basis and four commented on ATF's lack of a field presence (with one adding “but we can't do everything”) and three responses mentioned the coalition's lack of focus on SALT. Additional topics included: “Democratic consensus to repeal far more of TCJA,” “policymakers failing to include ‘easy’ rate increases in BBBA package,” “lack of knowledge among the general public of what was in the BBBA,” “lingering confusion around if we want to advocate for increased revenue from the top for their own sake, or only as a means of paying for important public investments,” and “lack of focus on legacy tax issues of importance to coalition members.” A sample of quotes is below.

“I would say the biggest disappointment is the transactional way that racial justice has been used in the work of the coalition. A perfect example being the racial justice tax letter, which appeared (it seemed) only when CBC members were deemed important to save the tax provisions, or the haphazard way racial justice is thrown into documents like a box is just being

checked off.”

“Inability to tie equality and equity in the tax code to making average American's lives better. While ATF's success in gaining support for a fairer tax code has been amazing we haven't made average people think it will improve their lives so much that they are willing to carry these ideas into the ballot box or make the majority of elected officials fear being on the wrong side of this.”

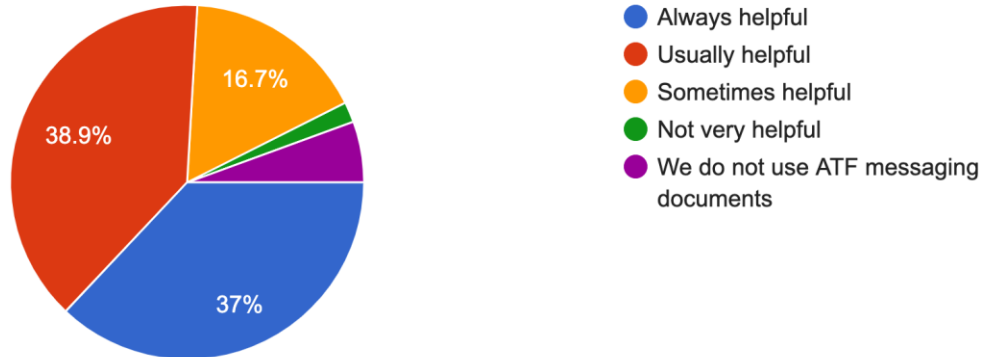
“While we have tremendous engagement there are still some groups we are missing, especially those with grassroots reach.”

“Wouldn't consider anything ATF did as a failure. Outside forces frequently dictate what ATF has little control over.”

ATF MESSAGING EVALUATION

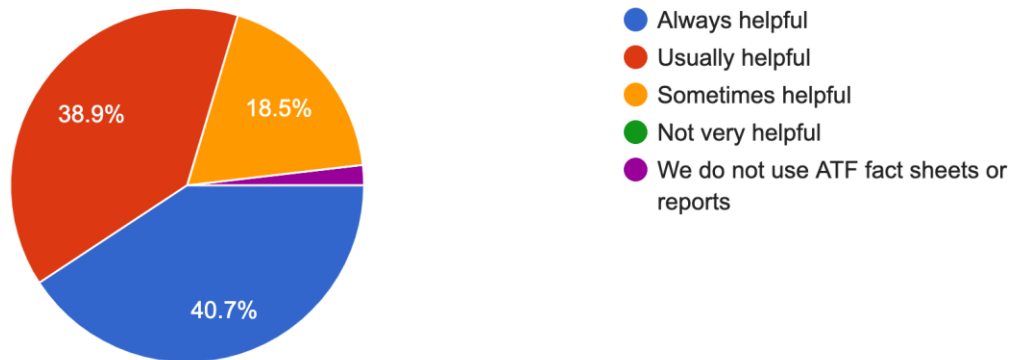
ATF conducts polling and produces messaging materials, such as “Talking Points on the Biden Tax Plan” or “Talking Points on the House-Passed Build ... helpful do you find these materials to your work?

54 responses



ATF regularly produces fact sheets and reports, such as “President Biden’s Build Back Better Plan Lowers Costs For Families And Is Fully Paid For” an... helpful do you find these materials to your work?

54 responses



Are there any fact sheets, talking points or reports that ATF has NOT produced that would be helpful to your work in 2022?

The suggestions that were repeated were fact sheets on race and taxes and fact sheets on inflation. Respondents also said they value clear simplified language with strong visuals and those that give clear comparative examples for how taxes can fund programs. A few additional suggestions are quoted below.

“What each tax provision could pay for in detail and past BBB”

“Who killed Step-Up?”

“Maybe as groups start focusing on the midterms an ATF assessment on all of the priority races where they stood on tax fairness spreadsheet to reference and provide more campaign content (to promote champs and hold weak Ds accountable)”

“More focused on the wealth of Bezos etc -- and helpful storytelling comparing that to [all Amazon workers combined, the state of Wyoming, etc]. It's not clear people understand just how gross the inequality is.”

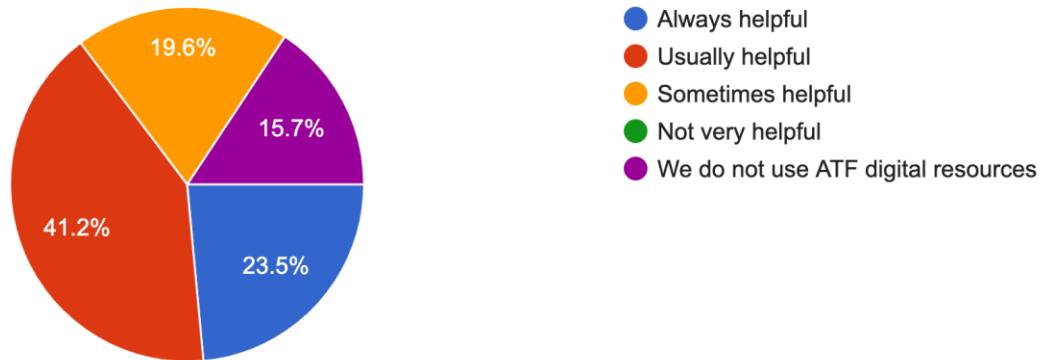
“1. Insiders Guide (2-3 pages): How do we Tax the richest 1 & tax Wealth Like Work?: Compare and Contrast: (1) Wealth tax; (2) billionaire income tax; (3) Raising tax rates on capital gains/dividends; (4)

2. Four Years Later: Did Trump-McConnell-Ryan Tax Scam Deliver for Working Families or the Wealthiest 1% ?”

“Material dealing with deficits, deficit reduction, Something to counter the material and arguments being advanced by the Center for Responsible Budget and other deficit hawks.”

ATF regularly shares tweet threads and social media toolkits. How helpful does your organization’s digital staff find these resources?

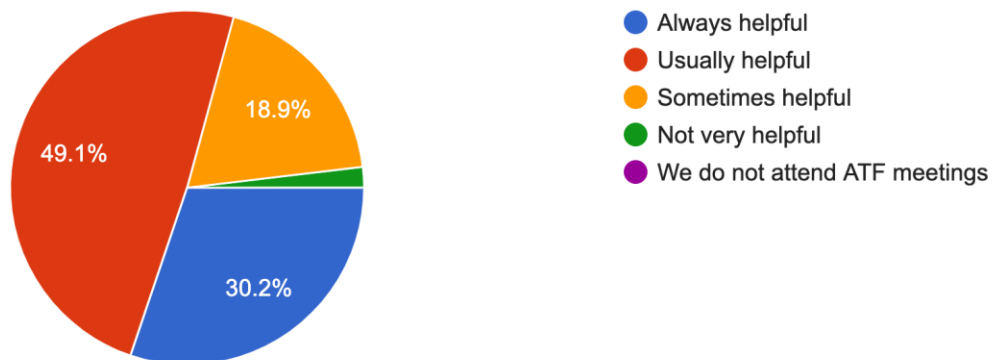
51 responses



ATF COALITION MEETING EVALUATION

How helpful are ATF coalition meetings to you and your organization? (Note: During the BBBA fight meetings have typically been weekly; the schedule is normally monthly outside of the BBBA fight.)

53 responses



What are the most useful things about ATF coalition meetings?

The responses to this were very unified and fell into four categories: coordinating on messaging, info sharing, Hill updates and hearing from coalition members on their organizations’ priorities. Representative quotes are below.

“Open and honest discussion, high level sharing of information and insights, ability to reach consensus on strategy, and willingness to hear from all sides on issues.”

“The legislative update; the intel from Hill meetings; the updates from other groups on what they're doing (when succinct).”

“The overview and state of play are both usually very informative but the most useful are conversations leading to next steps / actions. These can be legislative / communications / or field focused.”

“Getting updates on all the latest happenings on Tax issues. Tax issues are important for my organization, but not something I have traditionally followed and only a small part of my portfolio, so the meetings are very helpful.”

What are the least useful things about ATF coalition meetings?

There was general consensus on a few points. The most common answer is that the meetings can run too long. Following that, respondents found it less useful when too much time is spent getting into the weeds on policy minutiae, when the meetings get off track, and when meetings veer into back and forths or fights between two coalition members. A sample of quotes is below.

“Some of the straight-forward report out stuff feels less helpful. The agendas are so detailed, a lot of it is just reading we can do on our own time. Perhaps giving us prompts in advance so that discussion around particular items is more robust would be helpful.”

“Sometimes debates veer into the weeds on messaging, etc. A greater focus on tactics -- and identifying specific people/groups to take on these tactics and deliver -- could be helpful.”

“Back-and-forth between one or two members that could be handled in a separate space”

“It's not usually helpful to get into detailed policy discussions during these meetings because of the size and breadth of the coalition. These take too much time and never seem to accomplish very much. (Though I understand they may sometimes be necessary if the group needs to agree on an issue.)”

Is there anything you would like to see ATF regularly employ at coalition meetings that we do not currently include (e.g.: guest speakers, organizational spotlights, specific topic focus)?

There was a fair amount of disagreement with respondents making opposite suggestions, such as suggesting we drill down on specific policies and another saying specifically “don't add more

content.” However, multiple respondents supported the idea of bringing in guest speakers, with several focusing on bringing in Hill staff specifically, while only two specifically opposed this idea. Several respondents also suggested focusing particular meetings to a topic, which would allow participants to join the meetings that particularly interested them. Representative quotes with relevant suggestions are below.

“I’m always a fan of presentations on polling and messaging. Guest presenters on that stuff, or legislative strategies would be great. I’d even be down to hear from people who have won previous fights talk about the twists and turns just to keep people energized and engaged and prepared for the long fight.”

“I hadn’t thought about it but guest speakers would be a good idea. Doesn’t need to be the coalition meetings necessarily, could be optional brown bag lunches or something like that. Just to throw out one possible example - David Gamage on wealth tax constitutionality. Or someone fighting for/against a state tax referendum.”

“Maybe something that addresses silence. If 20 groups say nothing, does that mean they are bought in or not bought in? Maybe real-time “sense of the room” votes?”

“Participation of Hill staffers. Would be great to hear directly from them about what would be helpful.”

ATF SIGN ON LETTER AND COMMITTEE MEETING EVALUATION

ATF often leads organizational sign-on letters to members of Congress. Is there any feedback you would like to provide regarding the frequency, focus, length, style or substance of the letters?

Twenty-nine respondents chose to answer this question and of that, twenty-three gave positive feedback on the letters and encouraged them to continue. Some respondents said their organizations do not sign on to letters as their standard policy. On feedback, two respondents highlighted that ATF should be intentional to include racial and gender equity language and one respondent wondered what the approval and feedback process is on these letters. Representative quotes are below.

“I appreciate when the letters are substantive enough to serve as educational tools rather than just demonstrating positions.”

“Feel the letters are timely and have used language to send emails to the Hill to amplify”

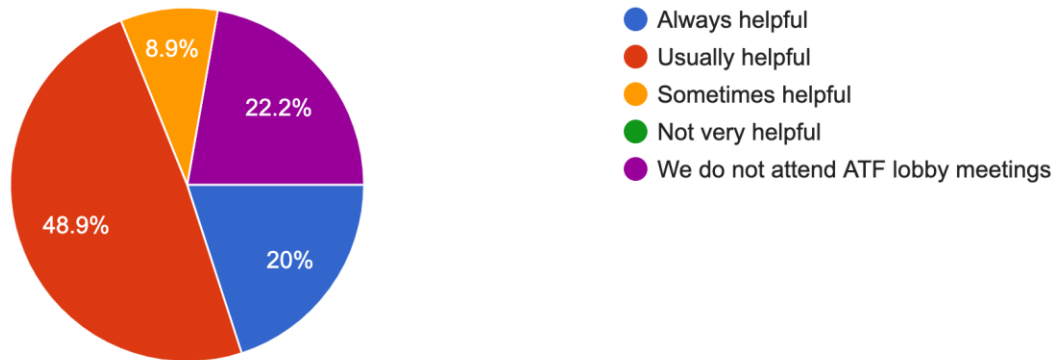
“I never know how effective those letters are but they are fine to do and I have no complaints. If ATF did not exist my org would probably feel compelled to put together some organization letters on occasion around certain tax issues and I am generally glad we don't have to deal with that because ATF does it.”

“I'd be mindful of making sure the language is as inclusive (in terms of racial and gender equity) as possible -- there have been a couple letters that our org paused on signing because we weren't sure the language was inclusive enough to align with our org values.”

“Your letters are always great.”

If you join ATF lobby meetings, how helpful are they to helping achieve the goals of your organization?

45 responses



What would make these lobbying meetings more valuable to you, or help you participate more?

There were limited responses to this, though several people said they found them valuable and a few respondents felt that the meetings should be kept small in size so as not to overwhelm the Hill staffers. A few quoted suggestions are below.

“I think ATF does some meetings that aren't open to full membership, would be handy to have a recap of those conversations (sometimes feel like they get mentioned on the side, confusing)”

“It seems there should be a way for groups that don't do extensive lobbying to participate in more limited, strategic ways on issues they know well. In other words, if you can't attend every meeting but you want to help build relationships and share specific knowledge.”

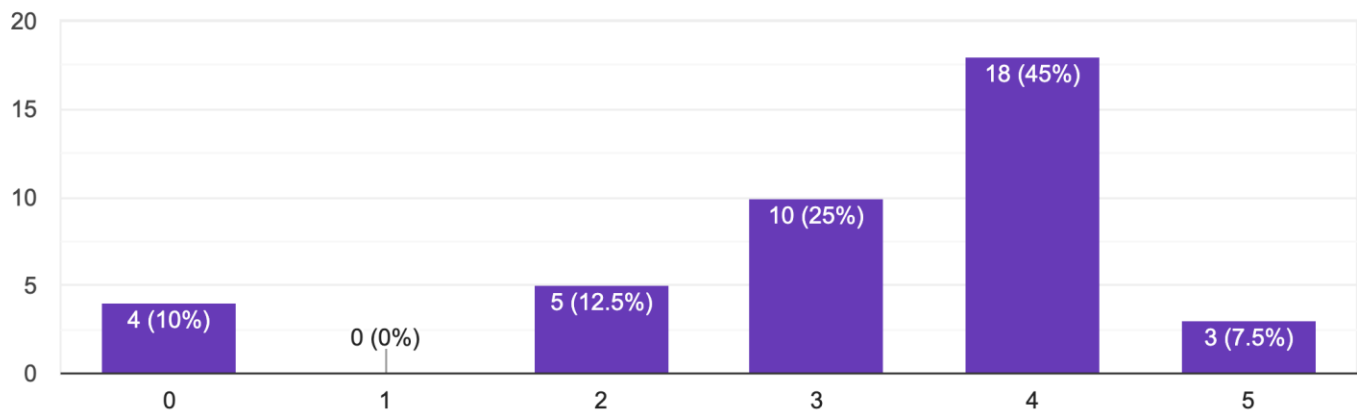
“Before each meeting, lobbyists should gather for 5-10 minute prep session. Meeting organizer should email lobbyists staff bio, state of play for that congressperson, Key tax interests/goals/priorities/obstacles. We should waste less time asking staff to update us on basics or them pontificating/speculating & more time on key substance and next steps. Ask participants how well they know staffer & how many (key) constituents in state/CD. This prep work would be very beneficial and rewarding.”

“More advanced notice. More precision regarding the purpose/topic for the meeting. People may have varying degrees of interest in topics.”

“I would appreciate some kind of big picture - an overall legislative plan, strategy or timeline - to put each lobby meeting in context. Sharing intelligence on the member and staff in advance is always useful. So is prioritizing spokespeople from the district or organizations that have members in the district and asking them in advance to prepare an in-district story relevant to the issue at hand.”

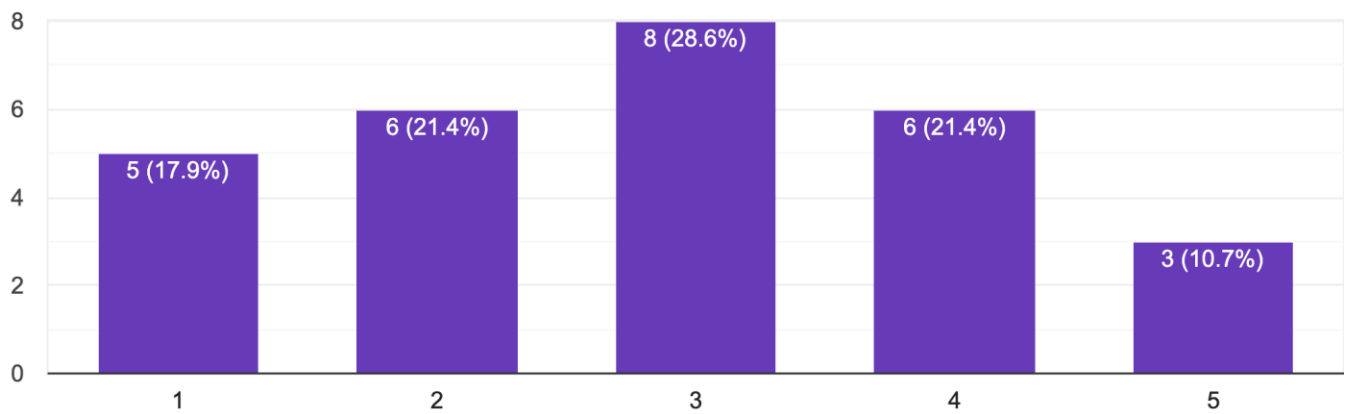
ATF Committees: For many months, ATF has met as a large coalition and not held committee meetings. In the past it had regular Legislative Com...g a high priority. Skip question if not applicable.)

40 responses



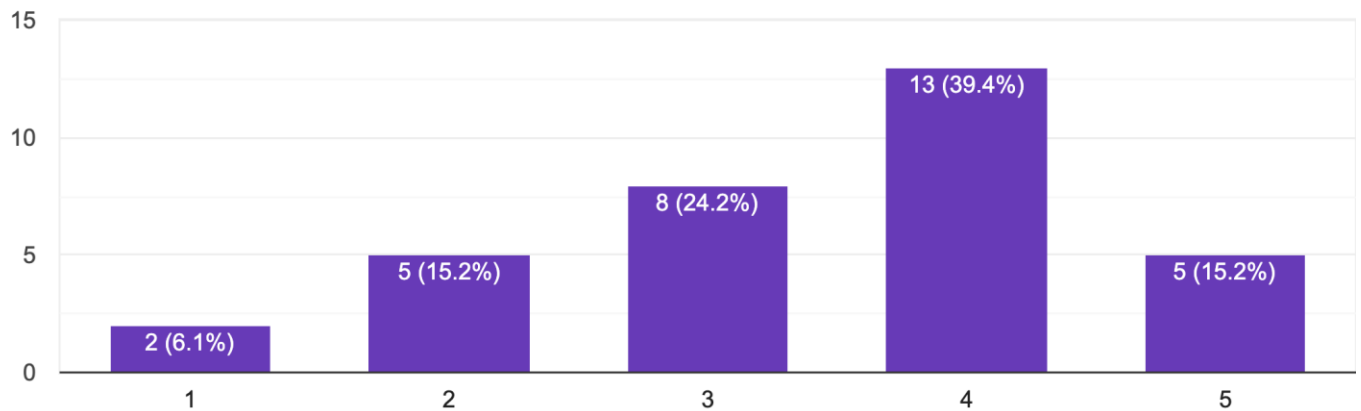
Currently, how much of priority is it to you for ATF to periodically conduct Field & Communications Committee meetings (Rank on a scale of 1 to 5 with 1...g a high priority. Skip question if not applicable.)

28 responses



Currently, how much of priority is it to you for ATF to periodically conduct Research and Policy Committee meetings (Rank on a scale of 1 to 5 with 1...g a high priority. Skip question if not applicable.)

33 responses



If your organization participates in committees, is there any feedback you would like to provide, including things that work well and/or things that would be helpful to implement in the future?

Only 15 individuals responded to this question. Of those, the majority expressed support for the meetings and found them valuable in keeping more in depth conversations out of the main coalition meetings. However, one respondent voiced the opposite, saying, “the fact that policy development is actually done through a group of select males providing input (versus through

the open forum where others might provide thoughts and learn from experts) is problematic.”
 A sample of additional representative responses is below.

“I like the concept of these committees because it would shave some time off the bigger meeting. For instance, I would participate in the field and comms meeting, and the question came up last week of the strategy around continuing to call the legislative package Build Back Better. That is a thing that could be kicked to committee, and we could discuss and come back to the full group with a recommendation. That type of process seems appropriate for similar topics.”

“Definitely need the smaller group leg or policy cttee meetings as a way to hash out hard issues among the most engaged groups rather than having those fights in front of the full coalition.”

“A standing calendar invite with zoom link and point of contact for all committees would be very helpful.”

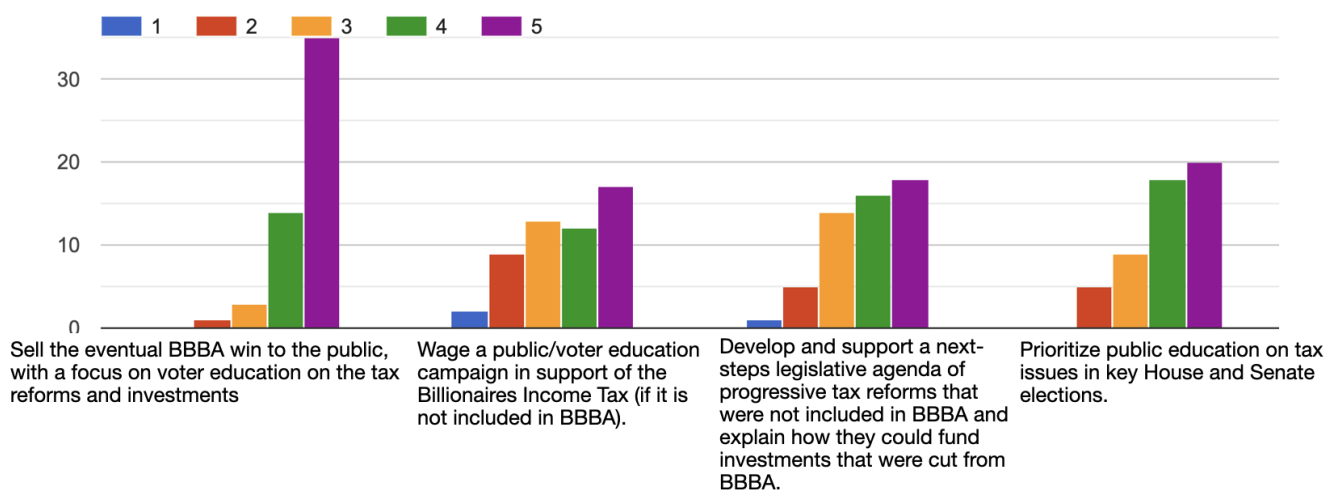
“I think it's a good idea to continue the smaller group meetings to dig more deeply into policy issues. If possible, it might be useful to develop a more explicit decision-making protocol for instances when the group doesn't agree.”

“The materials you draft are excellent and enhance overall work.”

ATF FUTURE WORK EVALUATION

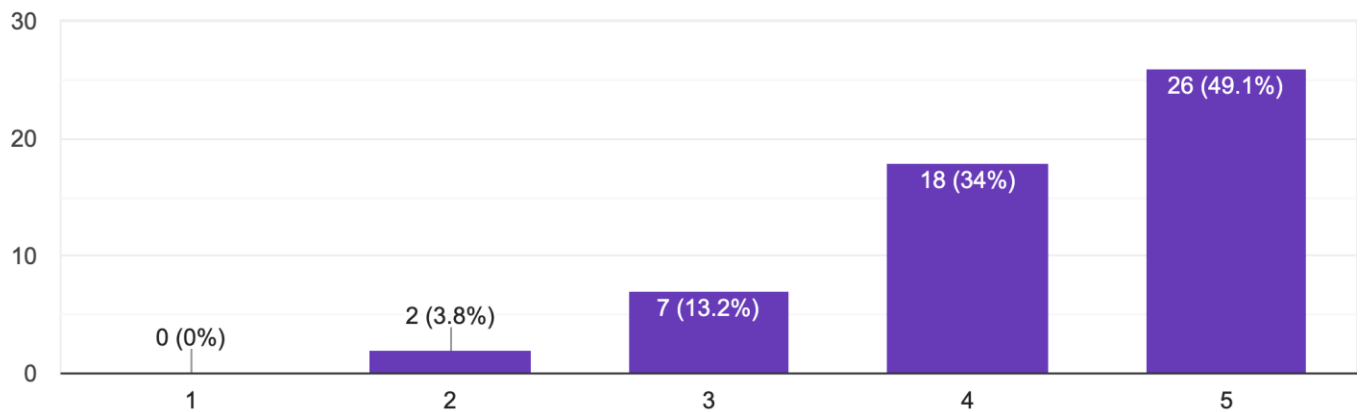
In 2022, assuming BBBA becomes law please rank the importance of these activities that ATF might undertake (Rank each item on a scale of 1 to 5...1 being a low priority and 5 being a high priority).

53 responses



How much is your organization planning to integrate tax fairness policies and messages into your core work this year? (Rank on a scale of 1 to 5 with 1 being a low priority and 5 being a high priority).

53 responses



Is there anything else you'd like ATF to know?

Of the 21 participants, there was only one repeated response: 13 respondents praised ATF and/or remarked they were grateful for ATF! Additional thoughts are quoted below.

“Basically I'm glad that ATF exists because it performs several functions that are necessary and that I don't want to do. I don't want to commission polls. I don't want my org to spend all its time lobbying. I would not mind if my org occasionally took the lead on organizing a sign on letter and delivering it and getting media around it but I would not want to spend a lot of time on that so I'm glad ATF is doing it. I don't want to round up experts to do an event for Hill staff. I really do not want to convene meetings with unruly coalition members, I'm glad ATF is here for that. I like being able to work with the coalition on areas where we are all in agreement and I like being able to go off and do my org's thing on our own when necessary.”

“I'd like us to debate the merits of advocating for tax increases on the middle class”

“We need more of a plan for 2022 electoral engagement if BBBA does not come to any sort of fruition, or at least we need to be more realistic about our options.”

“Keep up the good work, accelerate the strategic planning, implement the 2021 review, initiate and advance the Exec. Dir. transition process, give everyone a raise.”

“Excited for the work ahead. Grateful for your organization's presence.”