



U.S. Department of Health and Human Services

ADMINISTRATION FOR

**CHILDREN & FAMILIES**

Office of Family Assistance

# Welcome to the Building an EITC Coalition Webinar

Thursday, July 12  
1 p.m. EDT



U.S. Department of Health and Human Services

ADMINISTRATION FOR  
**CHILDREN & FAMILIES**

Office of Family Assistance

Welcome:  
James Butler  
*Federal Project Officer*  
*Office of Family Assistance*



U.S. Department of Health and Human Services

ADMINISTRATION FOR  
**CHILDREN & FAMILIES**  
Office of Family Assistance

**Carter Elliott**

*Manager, Prosperity Campaign  
Atlanta Community Food Bank*



Atlanta  
Prosperity  
Campaign

An Initiative of The Atlanta Community Food Bank

# ***Building a Statewide EITC Coalition***

U.S. Department of Health and Human Services  
Administration for Children & Families  
Building an EITC Coalition  
July 12, 2012



Atlanta  
Prosperity  
Campaign

An Initiative of The Atlanta Community Food Bank

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**What can be done to reach  
EITC-eligible households throughout  
the state of Georgia?**

# Georgians for Prosperity (G4P) Getting Started

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An Initiative of The Atlanta Community Food Bank

- In Georgia - 9 local Coalitions that focus on EITC and free tax preparation
- Brought like-minded organizations together from across the state:
  - Existing local EITC coalitions
  - Government agencies
  - Social service organizations
  - Businesses
  - Financial institutions (banks and credit unions)
  - Universities
- Started with a single focus – promoting access to free tax preparation and asset-building services
- Held the first statewide meeting in June 2010 (200+ attendees) – Welfare Peer TA Network covered most of the costs

# Georgians for Prosperity (G4P) Getting Started

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An Initiative of The Atlanta Community Food Bank

## Considerations:

- Membership-fee organization vs. volunteer organization
- Organizational structure (reps from across the state):
  - Elected officers (President, VP, Secretary, etc.)
  - Executive Committee
  - Board of Directors
  - Regularly scheduled meetings
  - Directors & Officers Insurance
  - Fiscal Agent
- Paperwork
  - Articles of Incorporation
  - Bylaws
  - 501(c)3

# Georgians for Prosperity (G4P)

## Building a Coalition

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### Critical Success Factors:

- Identify the goal/mission of the Coalition: G4P - create economic stability through education and implementation of free tax preparation and asset-building opportunities.
- Identify a “Champion” for the Coalition who can invest the time to lead the group
- Build relationships with entities that share the vision – “What is in it for them”
- Create a positive/transparent environment for the members
- Trust among members
- Engage the members – workgroups – Keep them involved
- Get members to take ownership

# Georgians for Prosperity (G4P)

## Benefits of a Coalition

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- Tight budgets, therefore coalitions can leverage resources - external resources and expertise together
- Cross promote services and share best practices
- Entities better see the “big” picture
- Long-term – advocacy – single voice on EITC and asset-building in the state
- Increase resources into the community (i.e., VITA grant)
- Connect entities that historically have not worked together



Atlanta  
Prosperity  
Campaign

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# Thank You

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**Carter Elliott**  
**Executive Committee Member – Georgians for Prosperity**  
**Manager – Atlanta Prosperity Campaign**  
**Atlanta Community Food Bank**  
**(678) 553-5900**  
**[carter.elliott@acfb.org](mailto:carter.elliott@acfb.org)**

**[www.atlantaprospersity.org](http://www.atlantaprospersity.org)**



U.S. Department of Health and Human Services

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Maggie Doedtman  
*Program Coordinator*  
*KC Cash Coalition*

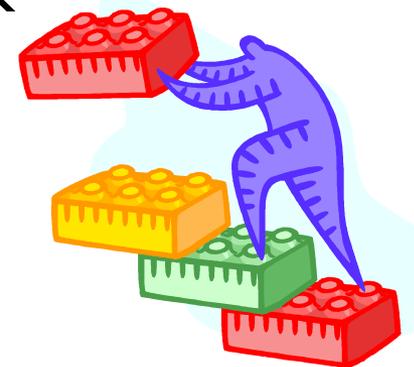
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# Building the KC CASH Coalition

Welfare Peer TA Network

Maggie Doedtman

July 12, 2012





# KC CASH: A History Lesson

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- Pre-2003: The model
  - Kansas City, Kansas Free Tax Assistance for Kansans Coalition: 974 tax returns
- 2003:
  - The need
  - The planning
  - The new Kansas City, Missouri Earned Income Tax Credit Coalition

# KC CASH: More History

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- 2004:
  - Common goals
  - Common members
  - Combined coalition
- 2007:
  - Incorporation
  - 501(c)(3)
- 2012:
  - Continuing to build

# So what's needed to start a successful EITC coalition?

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- Vision
- Seed money
- Steering committee members:
  - Dedication to mission
  - Variety of professions
  - Time
- IRS-SPEC involvement
- Program mentors (NCTC)

# And once you've gotten off the ground (future steps):

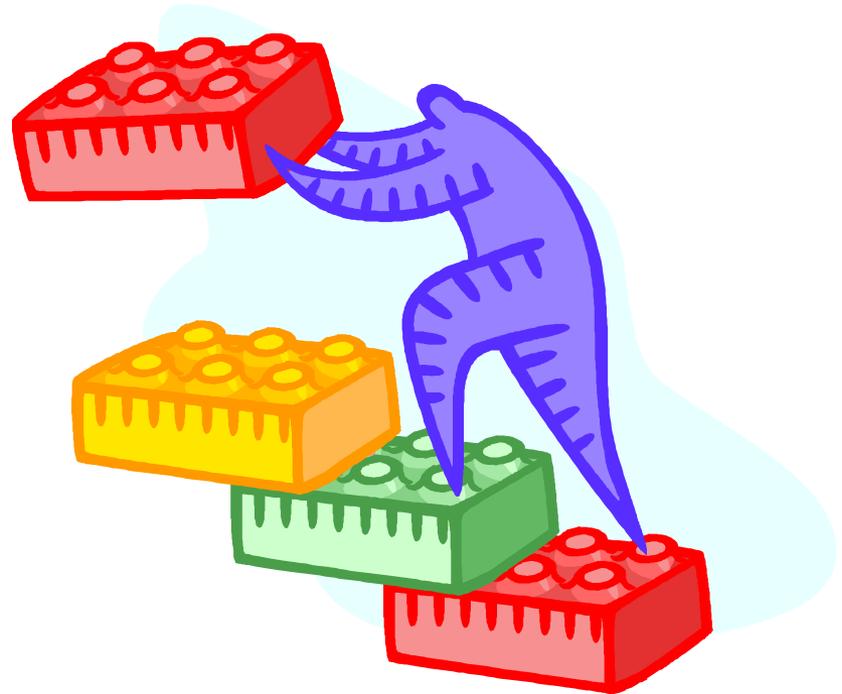
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- ❑ Incorporation: 501 (c)(3)
- ❑ Mission Statement
- ❑ Good marketing/PR team
- ❑ Partnering with disability groups, other nonprofits
- ❑ Staff

# Go forth and build!

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Maggie Doedtman  
[maggie@uwgkc.org](mailto:maggie@uwgkc.org)  
816-559-4676





U.S. Department of Health and Human Services

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Office of Family Assistance

**Beckie Harrell**

*Senior Tax Analyst*

*Stakeholder Partnerships, Education,  
and Communication (SPEC)*

*Internal Revenue Service*



## Welfare Peer TA

# *Building an EITC Coalition*

July 12, 2012  
Webinar

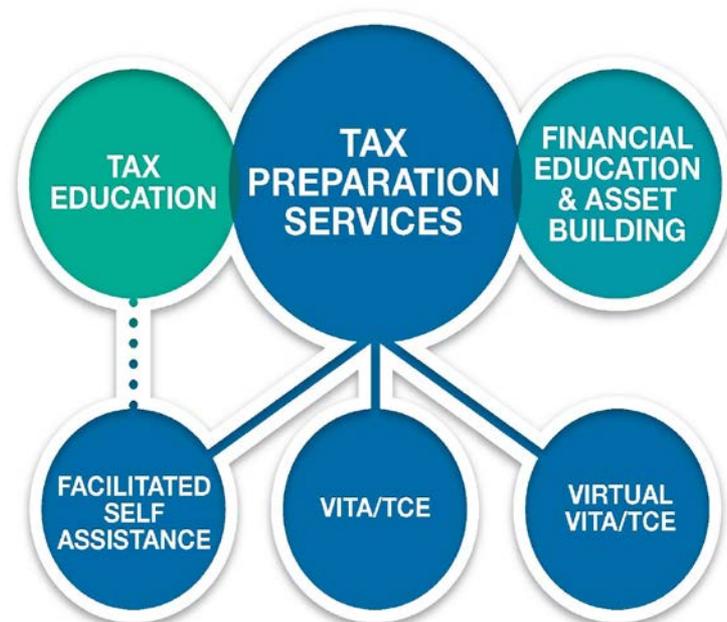


# Internal Revenue Service

- In the IRS, the Wage and Investment (W&I) Division provides tax processing, compliance, and customer service for virtually 123 million individual taxpayers.
- W&I includes five campuses that process tax returns and other tax documents; 25 sites that provide account management (toll-free and correspondence) services; and over 400 field operation sites that provide direct taxpayer assistance.
- Stakeholder Partnerships, Education & Communication (SPEC) is the Outreach and Education arm of the Wage and Investment Division of the IRS.
- SPEC partners with community based organizations to gain access and provide service to lower income, elderly, disabled, Native Americans, non-English speaking and rural populations.
- SPEC manages the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) free tax preparation programs.

SPEC's Business Model is leveraged through client-based organizations. The model integrates tax education and free tax preparation with other strategies promoted by partners to increase income, build savings, and gain and sustain assets for targeted SPEC taxpayers.

SPEC Business Model



SPEC currently partners with 75 National Partners, over 396 coalitions, and 3,952 local partner organizations of all types:

- Corporate
- Faith-based
- Nonprofit
- Educational
- Financial
- Governmental
- Public service



- **HHS-ACF and IRS-SPEC Partnerships**
  - **Memorandum of Understanding (MOU)**
  - **National**
  - **Local**
  - **Tax Outreach**
  - **Free Tax Preparation Sites**
  - **Asset Building**
  - **VITA Grants**
  - **ACF Tax Outreach Workgroup**

- **Community organizations with common interests /shared commitment of helping working families**
- **Organizations who work directly with mutual clients/taxpayers**
- **Coordinate existing activities of multiple organizations**
- **Combine resources expand services**



# Why Community-based Coalitions?

- **Ensure taxpayers have the correct tax liability— including claiming all credits**
- **Provide Free tax preparation services**
- **Generate stronger outreach in communities**
- **Encourage savings, asset building and provide financial education**
- **Share the same mission with many local and national organizations**

- Housing Authorities
- Workforce Dev Programs
- Community Dev Financial Institutions (CDFIs)
- Financial Education providers
- TANF agencies
- HeadStart Programs
- Community Action Agencies
- Social Service Providers
- Congressional Offices
- Mayor's Offices

- K-12 Schools
- Colleges & Universities
- Financial Institutions
- Major Employers
- Local Foundations
- State Agencies
- Retailers
- Small businesses
- Individual Development Account (IDA) programs

- **There may be one in your hometown!**
- **The National EITC Partnership website:**  
**[www.cbpp.org/eitc-partnership](http://www.cbpp.org/eitc-partnership)**
  - Directory of local partnerships, by state
  - Spreadsheet with coalition members & chairperson to contact
  - Goals and activities of coalition
  - IRS Territory Manager contact



# What is EITC and CTC?

A federal tax benefit to help low and moderate income workers increase their financial stability.

- **Purpose:**

- Offset income and payroll taxes
- Supplement wages
- Provide a work incentive

- **Key Features:**

- Reduces taxes workers may owe
- Even if workers don't owe taxes, they may be eligible
- Some families can claim both credits
- EITC can be refundable

- **January 2013 will be EITC Awareness Day!**

## EITC is One of the Largest Antipoverty Programs

- Last year, over 26.8 million received almost \$59.5 billion in EITC for 2010 tax year returns. <sup>1</sup>
- Four of five people eligible for the credit claim it.
- EITC lifted an estimated 6.6 million people out of poverty, including 3.3 million or half of them children

- *1Source: Report NR. 701-98-11 As of December 31, 2011, Year to Date*



# Tax Year 2012 EITC Chart

<b>Number of Qualifying Children</b>	<b>Single/HoH, Qualifying Widow(er), Income &lt;</b>	<b>MFJ Income Must be Less Than</b>	<b>Range of EITC</b>
<b>No Child</b>	<b>\$13,980</b>	<b>\$19,190</b>	<b>\$2 to \$475</b>
<b>One Child</b>	<b>\$36,920</b>	<b>\$42,130</b>	<b>\$9 to \$3,169</b>
<b>Two Children</b>	<b>\$42,042</b>	<b>\$47,162</b>	<b>\$10 to \$5,236</b>
<b>Three or More Children</b>	<b>\$45,060</b>	<b>\$50,270</b>	<b>\$11 to \$5,891</b>



Child Care



Rent & Utilities



Transportation



Auto Repairs



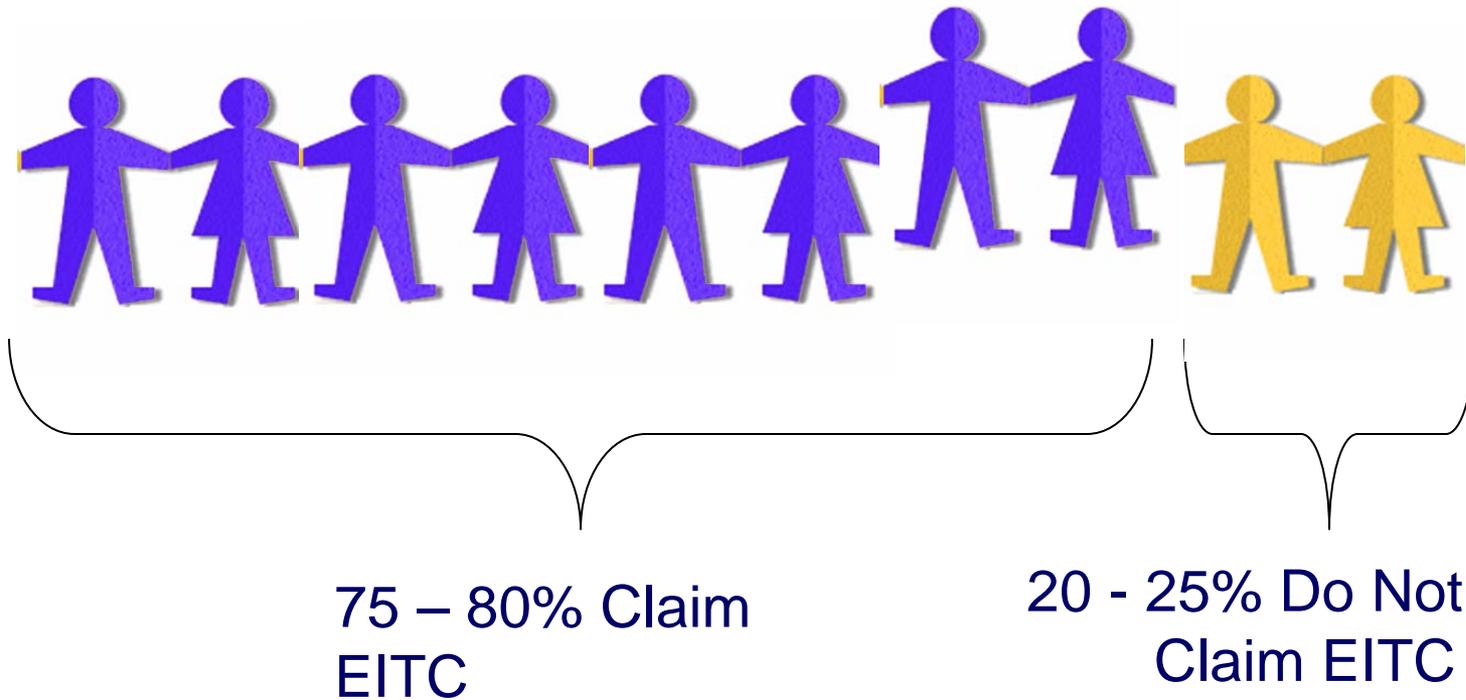
Basic Needs



Medical Expenses

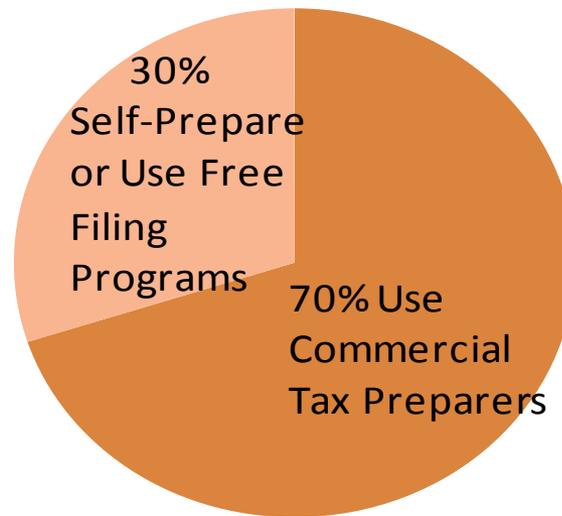
**The credits help workers keep working and care for themselves and their children.**

## *EITC Eligible Workers*



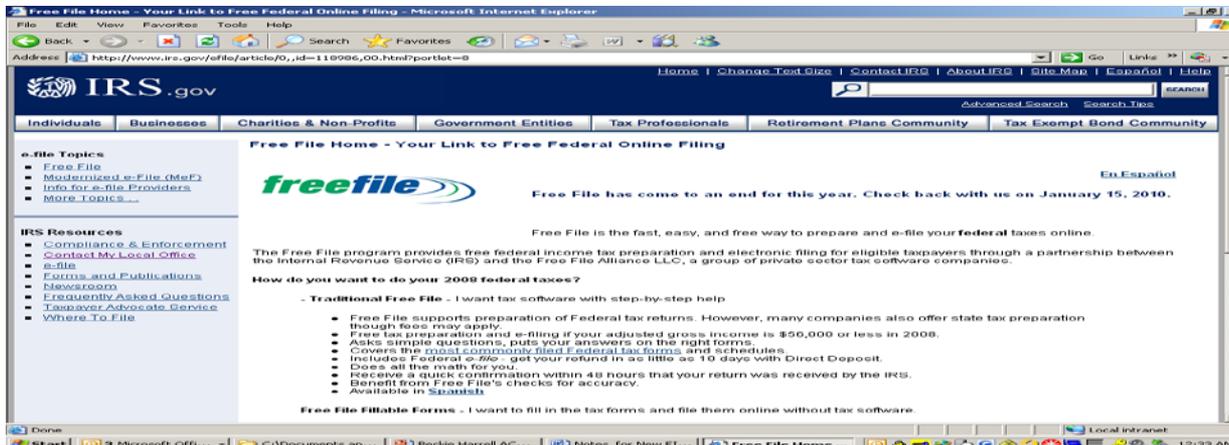
- **Workers not required to file returns**
- **Welfare recipients entering workforce**
- **Family members with disabilities**
- **Workers becoming eligible due to reduced earnings, loss of employment**
- **Newly divorced or separated custodial parents**
- **New parents**
  - **Foster**
  - **Adoptive**
  - **Grandparents**

- When it's time to file a tax return, many workers seek help from a commercial tax preparer.
- Average fees range from \$85 - \$120 for e-filing.



## EITC Claimants

- ❑ More than 13,000 free income tax preparation sites nationwide
- VITA-TCE
- ❑ Approximately 400 IRS Taxpayer Assistance Centers nationwide
- ❑ **freefile** through IRS.gov for internet-enabled do-it-yourselfers





# SPEC Results for 2012 Filing Season

- Prepared nearly 3.2 million federal tax returns
- Completed over 2.5 million state returns
- Achieved a 97% electronic filing rate for these returns
- Returned over \$3.7 billion in federal tax refunds
- Increased Direct Deposit Rate to 67.1%
- Savings Bonds requested for 52,012 taxpayers
- Volunteer sites prepared 3,160,512
- Free Tax Prep Sites 13,143
- Volunteers 98,978

## 2013 Filing Season Opportunities

## Free Tax Prep

- Alternative VITA/TCE Models
  - o Facilitated Self Assistance Model (FSA)
    - This approach incorporates tax education into the tax preparation process
    - Taxpayers prepare their own returns with the assistance of a certified volunteer and self-preparation software
    - One facilitator can assist multiple taxpayers
  - o Virtual VITA/TCE
    - This approach uses the same process as traditional VITA/TCE except the preparer and taxpayer are not face to face
    - Technology is used to connect the volunteer preparer and the taxpayer Technology includes internet, fax, and video
- 2013 VITA & TCE Grants [www.irs.gov](http://www.irs.gov) Keyword: VITA Grant
- Host a Site - send email to [partner@irs.gov](mailto:partner@irs.gov)
- Volunteers send email to [taxvolunteer@irs.gov](mailto:taxvolunteer@irs.gov)

## ***“Tax Time Savings”***

- Direct Deposit
- Savings Bonds
- Split Deposits
- Link refunds to AFI IDA

## Outreach

- Identity Theft
- Tax Education Programs
  - Understanding Taxes
  - Get Right With Your Taxes
- Tax Credits
- New Tax Changes

## **ACF-SPEC Partnership Focus**

- Assets Initiative/EITC
- Rural Clients
- Native American Clients
- Tax Time Asset Building

- Strengthen communities by joining/working with coalitions
- Involve government, business, and community leaders
- Recruit volunteers for sites
- Distribute EITC educational materials
- Sponsor/coordinate a tax prep site
- Consider participating in 2 new VITA/TCE Models
  - Facilitated Self-Assistance
  - Virtual VITA
- Share excess computers, printers, materials and resources
- Integrate Asset Building

- Free Tax Brochures, Products, Forms, Publications
- Marketing Tools on Outreach Corner
  - Drop-In Articles
  - Tax Podcasts
  - PSAs
  - Tips on Tax Issues
- EITC Central
  - EITC Statistics
  - Ready Made Marketing Tools
  - Customizable Marketing Tools
- EITC Nationwide Outreach Day



Life's a little easier with  **eitc**  
earned income tax credit

**Be Prepared to Get the  
Earned Income Tax Credit  
You Earned**

1.800.828.1040 | [www.irs.gov/eitc](http://www.irs.gov/eitc) | ASK YOUR TAX PREPARER

Division of the Treasury Internal Revenue Service Publication 471 (2014) © 2014 U.S. Gov't Printing Office: 2014M-100-100-1000

**If** you plan to use a preparer to help you file a return and claim the EITC, you should bring certain documents to prove your income, deductions/credits, dependents, etc. These documents include:

- Valid driver's license or photo identification (self & spouse, if applicable)
- Social Security cards for all persons listed on the return
- Dates of birth for all persons listed on the return
- All income statements: Forms W-2 and 1099, Social Security, Unemployment, or other benefits statements, records of income and expenses from a business you own and any documents showing taxes withheld
- Dependent child care information: payee's name, address and SSN or tax ID number
- Proof of account at financial institution for direct debit or deposit (i.e. cancelled/ voided check or bank statement)
- Prior year tax return (if available)
- Any other pertinent documents or papers

Your Return Preparer, whether paid or volunteer, is required to ask you multiple questions to determine your correct income, expenses, deductions, and credits. Your Return Preparer has your best interests in mind and wants to help you avoid penalties, interest, or additional taxes that could result from later IRS contacts.

You are responsible for what is on your tax return. Being ready, with the right documents to prepare your return, will save you time and reduce the chance of mistakes.

Earned Income Tax Credit

Life's a little easier with  earned income tax credit

EITC CENTRAL

TAX PREPARER TOOLKIT

PARTNER TOOLKIT

MARKETING EXPRESS

Welcome

About EITC

What's Hot

Preview of Tax Year 2009

Child Related Tax Benefits Comparison

EITC Statistics

EITC Information for Press

News Releases and PSAs

Feedback Page

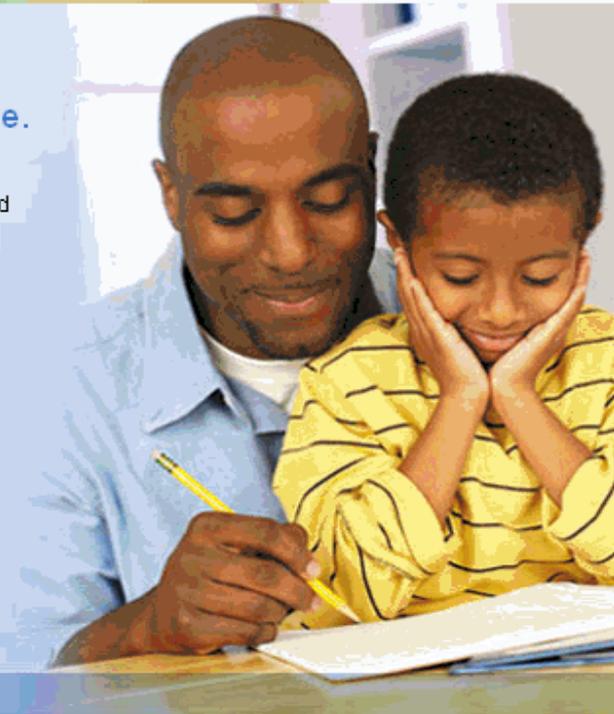
Search

## Welcome to EITC Central: Everything you need, all in one place.

We created this new and improved site for our valued IRS partners and tax preparers. By using the latest tools for marketing, education and tools to help in accurate tax return preparation, you can ensure all EITC eligible workers receive the credit they earned and deserve.

IRS's goals for EITC are to increase participation while reducing error. The resources in this kit help balance the goals, assisting you in reaching those eligible workers who qualify for the credit and preparing accurate returns which reduces claims made in error.

We welcome [comments and suggestions](#) to better meet your needs in improving this site.



We thank you for your efforts in serving taxpayers well.

Life's a little easier with  **eitc**  
earned income tax credit

EITC CENTRAL
TAX PREPARER TOOLKIT
PARTNER TOOLKIT
MARKETING EXPRESS

[Welcome](#)

[About EITC](#)

[What's Hot](#)

[Preview of Tax Year 2009](#)

[Child Related Tax Benefits Comparison](#)

[EITC Statistics](#)

[EITC Information for Press](#)

[News Releases and PSAs](#)

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## EITC Statistics

### EITC State Statistics at-a-Glance for Tax Year 2008

State-by-State EITC Statistics for Tax Year 2008 through September 30, 2009

State	Abbr.	Number of Net EITC Recipients	Average Net EITC Amount	Total Net EITC Amount
Alaska	AK	36,290	\$1,630.92	\$59,186,002.00
Alabama	AL	507,475	\$2,384.89	\$1,210,273,261.00
Arkansas	AR	292,310	\$2,194.25	\$641,400,388.00
Arizona	AZ	460,585	\$2,082.36	\$959,104,067.00
California	CA	2,540,178	\$2,038.81	\$5,178,940,121.00
Colorado	CO	290,647	\$1,851.90	\$538,249,075.00
Connecticut	CT	182,560	\$1,828.21	\$333,758,825.00
Washington DC	DC	46,726	\$1,886.89	\$88,166,973.00
Delaware	DE	63,578	\$1,956.60	\$124,396,952.00
Florida	FL	1,758,927	\$2,094.81	\$3,684,613,416.00
Georgia	GA	876,770	\$2,000.00	\$1,753,540,000.00



EITC is for people who earn less than \$48,279. If you qualify, it could be worth as much as \$5,657 this year, depending on your filing status and the number of qualifying children. So you could pay less federal tax or even get a refund. *Just imagine what you could do with that.*

# Q&A

- ❑ 800-TAX-FORM
- ❑ IRS Relationship Managers-  
[partner@irs.gov](mailto:partner@irs.gov)
- ❑ Order Forms and Publications-  
[irs.gov/formspubs/index.html](http://irs.gov/formspubs/index.html)
- ❑ EITC Central-  
[eitc.irs.gov/central/publications/](http://eitc.irs.gov/central/publications/)



# Partner @irs.gov

The screenshot shows a Microsoft Internet Explorer browser window displaying the IRS website. The address bar shows the URL: <http://www.irs.gov/individuals/article/0,,id=119374,00.html>. The page title is "Become an IRS Partner to Help in Your Community".

The website header includes the IRS logo, a search bar, and navigation links: Home, Change Text Size, Contact IRS, About IRS, Site Map, Español, and Help. Below the header is a navigation menu with tabs for: Individuals, Businesses, Charities & Non-Profits, Government Entities, Tax Professionals, Retirement Plans Community, and Tax Exempt Bond Community. A secondary menu lists: Employees, Farmers, International Taxpayers, Military, Parents, Self-Employed, Seniors & Retirees, and Students.

The main content area is titled "Become an IRS Partner to Help in Your Community". It contains the following text:

Make a difference in your community by partnering with IRS and thousands of nationwide organizations to meet individual taxpayers' needs for tax education and assistance. In these tough economic times, tax benefits can offer stronger financial stability for people and the communities in which they live. They can also serve as the starting point in [realizing dreams](#).

**Our Approach**

The Stakeholder Partnerships, Education and Communication (SPEC) office within the Wage & Investment Division has built a network of national and local partners. Organizations include corporate, faith-based, nonprofit, educational, financial and government. With so many tax benefits available today, taxes can serve as the starting point for a dream leading to stronger financial security for many people.

Partnering organizations prepare tax returns free for those whose incomes are below \$49,000. Also check out the partner [Outreach Corner](#) for links to newsletter articles, podcasts, widgets and other electronic products to help reach out to customers with timely tax news they may need.

If you represent an organization that works with any of the following populations, why not look further to see how you can become involved?

**Populations We Serve**

<a href="#">Low-to moderate-income population</a>	<a href="#">People with disabilities</a>
<a href="#">Older Americans</a>	<a href="#">General population</a>
<a href="#">Students</a>	<a href="#">English as a second language</a>
<a href="#">Military</a>	<a href="#">Employees</a>

At the bottom of the page, it says "Partner and Volunteer Resource Center".

The browser's taskbar at the bottom shows several open applications: Start, 4 Microsoft Office applications, "Become an I...", two "Outreach Corn..." windows, "D:\Rebecca Ha...", "C:\Documents...", "6 Microsoft O...", and "Document1 - Mi...". The system tray shows the date and time as 12:13 PM.

- Information about partnering [www.irs.gov](http://www.irs.gov) Keyword: Partner
- VITA Site Locator
  - [www.irs.gov](http://www.irs.gov) Keyword: VITA Sites
  - Call 1-800-906-9887
- SPEC Contacts [partner@irs.gov](mailto:partner@irs.gov)
  
- EITC Central Website [www.eitc.irs.gov/central/main/](http://www.eitc.irs.gov/central/main/)
- EITC Coalitions [www.cbpp.org/eitc-partnership](http://www.cbpp.org/eitc-partnership)
  
- Brookings Institute [www.brookings.edu/metro/EITC](http://www.brookings.edu/metro/EITC)
- Center on Budget and Policy Priorities [www.cbpp.org/eic2010](http://www.cbpp.org/eic2010)
- National Community Tax Coalition [www.tax-coalition.org](http://www.tax-coalition.org)
- Community Development Financial Institution [www.cdfifund.gov](http://www.cdfifund.gov)
- First Nations Oweesta Corporation [www.oweesta.org](http://www.oweesta.org)

*Thank you!!*

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U.S. Department of Health and Human Services

ADMINISTRATION FOR  
**CHILDREN & FAMILIES**  
Office of Family Assistance

**Yvette Lamb**  
*Technical Advisor*  
*Self Sufficiency Research Clearinghouse*

# The Self-Sufficiency Research Clearinghouse Portal: A resource for finding and using materials to support Building an EITC Coalition

July 12, 2012





# What is the SSRC?

- Sponsored by the Office of Planning, Research and Evaluation (OPRE)
- **Virtual collection of high quality research and resources focused on the field of self-sufficiency**
- Target users are researchers, practitioners and policymakers involved in work related to the self sufficiency of families and individuals



# Organization: Twelve Topic Areas

- Asset-Building, Tax Policies, and Subsidies
- Child Care
- Child Support
- Community Development and Housing
- Education and Training
- Employment
- Family Structure and Family Formation
- Food Assistance
- General Research on Income and Poverty
- Health
- TANF Policy, Services, and Benefits
- Transportation



# Guiding Principles

- The **SSRC Collection**— virtual stacks selected using a vetted Research Framework and inclusion criteria focused on high quality; includes multi-disciplinary materials;
- **Ease of Use**— clear menu driven search and retrieval processes
- **Flexibility** multiple ways of finding a resource; ability to re-classify documents based on user input
- Capacity to create **robust interaction within and across end user groups**
- **Submit a Resource** feature allows for research and resources to be suggested for inclusion from end users

# Screening of SSRC

# Questions and Discussion

[www.opressrc.org](http://www.opressrc.org)

Comments can be sent to:

[esimon@icfi.com](mailto:esimon@icfi.com) or [ssrc@opressrc.org](mailto:ssrc@opressrc.org)



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Questions?



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Thank You For Attending!