



Welfare Peer Technical Assistance Network

Earned Income Tax Credit (EITC) Strategies for Louisiana



Baton Rouge, Louisiana

|

October 25–26, 2004

AGENDA

Day One: October 25, 2004

8:00 a.m. – 8:30 a.m.	Registration
8:30 a.m. – 9:00 a.m.	<p>Welcome and Introductions <i>Ann Williamson, Secretary, Louisiana Department of Social Services</i> <i>Cynthia Bridges, Secretary, Louisiana Department of Revenue</i> <i>John Warner Smith, Secretary, Louisiana Department of Labor</i> <i>John Horejsi, Federal Project Officer, Welfare Peer TA Network, Administration for Children and Families</i></p> <p>This is Louisiana's first statewide workshop on the Earned Income Tax Credit (EITC). This workshop will help build the capacity for communities to organize local initiatives and develop collaborative partnerships with public officials, civic and social service providers, employers, etc., to promote greater awareness of the Federal EITC and Child Tax Credits (CTC). These local efforts will enable low-income families to become financially independent and self-sufficient. These efforts will also significantly enhance the economy of local communities and promote the development of a stronger work force.</p>
9:00 a.m. – 10:00 a.m.	<p>A Shared Vision for Community Economic Empowerment <i>Leon R. McCowan, Regional Administrator, Administration for Children and Families, Dallas Regional Office</i></p> <p>Building Foundations for Family Financial Self-sufficiency. Why TANF is the Right Place to Target an EITC Initiative <i>Grant Collins, Chief Program Officer, Office of Family Assistance, Administration for Children and Families</i></p> <p>Participation of former Temporary Assistance for Needy Families (TANF) clients in the EITC and CTC programs are important elements for building financial self-sufficiency. However, research reveals that current and former TANF clients are less likely to participate in these programs. The studies also report that minorities are less likely to receive these program benefits. This presentation will highlight several successful HHS pilot projects and targeted outreach strategies that have enhanced the participation of TANF clients and minority communities in the tax credit programs. These innovative outreach strategies will enable communities to bring millions of dollars in unclaimed earned benefits into the local economy.</p>

9:00 a.m. – 10:00 a.m.
(Continued)

Community Action Agencies: Catalyst for Building Bridges to Financial Empowerment of Low-income Communities

Margaret Washnitzer, Director, Division of State Assistance, Administration for Children and Families

Community Action Agencies are uniquely positioned to build community partnerships with the EITC financial literacy programs and tax assistance in local communities. These local initiatives provide low-income residents with critical resources and skills to develop financial self-sufficiency. This presentation will include updates on programs and grant opportunities that will enhance the development and expansion of local initiatives.

A question and answer session will follow formal remarks from the two panelists.

10:00 a.m. – 10:30 a.m.

Tax Assistance Partnerships and Volunteer Tax Assistance Site (VITA) Programs in Louisiana

Jan Pretus, Internal Revenue Service (IRS) Territory Manager, Arkansas and Louisiana

The power of coalitions is a driving force in all communities. The IRS Territory Office, through the Stakeholder, Partnerships, Education, and Communication (SPEC) organization, provides critical support to communities engaged in EITC outreach initiatives. SPEC partners with communities and businesses in developing and implementing community-based partnerships to promote education, and awareness of Federal tax credits, free tax preparation services, and asset building opportunities. This session will share highlights on the program 's successes in Louisiana and support for developing local initiatives.

New Resources for Rural Communities

Michael McBride, Chief, Educational Institutions and Government Partnerships, IRS

The IRS ' SPEC FY 05 Rural Outreach, Tax Return Preparation, and Financial Literacy Strategy outlines a plan of action that involves SPEC Offices and various partners utilizing rural pilots and models to deliver services to selected areas of low-income rural America. Information gathered from the FY 05 pilots is to be used to develop a national Rural Strategy for FY 06. Key to this strategy is the fact that it will utilize identification of, collaborate, and build alliances with groups that have extensive pre-existing rural infrastructures as a means of reaching even the most rural population. Equally important is the fact that partner organizations have extensive knowledge of other rural organizations. The State of Louisiana is an integral participant in the FY 05 Rural Strategy.

A question and answer session will follow formal remarks from the two panelists.

10:30 a.m. – 11:10 a.m.

Louisiana Bridge Builders for Community Economic Empowerment

Facilitator: Larry St. Amant, Office of Workforce Development Assistant Secretary, Louisiana Department of Labor

Overview of Louisiana EITC Initiatives: Sharing Best Practices of EITC Outreach Projects

*Ernie Hughes, Director of Development, Southern University AG Center
Crystal Rock, Program Manager, MAAT Foundation, Hammond Project
Peter Dangerfield, Executive Director, Total Community Action*

A question and answer session will follow formal remarks from the panelists.

11:10 a.m. – 11:25 a.m.

Break

<p>11:25 a.m. – 12:05 p.m.</p>	<p>Strategies for Building EITC Community Coalitions Facilitator: Michael McBride, <i>Chief, Educational Institutions and Government Partnerships, IRS</i></p> <p><i>Kaye Schmitz, Executive Director, Real Sense Prosperity Campaign</i></p> <p>The Real Sense Prosperity Campaign, funded by United Way of North Florida developed a broad-based, community-wide partnership between city officials, IRS, community organizations, and area business leaders. The coalition also secured the participation of faith-based leaders and the Hispanic community. The project included both an urban center and two rural communities. In the first year of operation, in 2004, The Real Sense Prosperity Campaign returned positive earnings (a ratio of 17:1) for net investment made on EITC outreach.</p>
<p>12:05 p.m. – 12:30 p.m.</p>	<p>Break</p>
<p>12:30 p.m. – 1:30 p.m.</p>	<p>New Opportunities for Developing Collaborative Partnerships on the EITC and CTC Facilitator: Earl Millet, Jr., <i>Regional Director, Louisiana Department of Revenue</i></p> <p>Louisiana Communications Strategy on the Earned Income Tax Credit and CTC <i>Byron Arthur, Press Secretary, Louisiana Department of Revenue</i></p> <p>The Louisiana Department of Revenue is a leader in providing community outreach on the EITC and CTC. This session will highlight the Louisiana inter-departmental outreach and communication strategy on tax credits and tax assistance resources.</p> <p>Working in Partnership with the Business Community <i>Lynn Mitchell, Policy Director, Corporate Voices for Working Families</i></p> <p>Businesses have a vested interest in supporting community EITC outreach initiatives and helping their employees learn about tax credits they are eligible to receive. Corporate Voices for Working Families has successfully developed EITC outreach partnerships with major business leaders to promote family stability and self-sufficiency. This session will highlight successful strategies for partnering with employers on EITC outreach initiatives. Corporate Voices for Working Families will also make the EITC Toolkit available for the business community.</p>
<p>1:30 p.m. – 2:00 p.m.</p>	<p>Workshop: Developing Community Partnerships <i>Robin Taylor, Senior Tax Analyst, IRS</i></p> <p>The IRS SPEC (Stakeholder, Partnerships, Education, and Communication) provides outreach and education assistance. Its approach is to combine community resources and goals with other organizations in providing assistance to low-income populations in local communities. This presentation will share the SPEC business model for coalition building that supports family financial self-sufficiency, tax awareness and education, tax preparation assistance, and financial literacy.</p>
<p>2:00 p.m. – 2:30 p.m.</p>	<p>Workshop: Developing a Volunteer Income Tax Assistance (VITA) Site Facilitator: <i>Robin Taylor, Senior Tax Analyst, IRS</i> <i>Diane Puderer, Senior Tax Specialist, IRS</i></p> <p>There are varied strategies to promote the availability of the EITC and CTC. Developing a VITA program is a resource available in some communities. Tools, resources and training modules facilitate the development and maintenance of a VITA program site. This session will review the IRS training resources to operate a VITA program, including online support resources.</p>
<p>2:30 p.m. – 2:45 p.m.</p>	<p>Break</p>

<p>2:45 p.m. – 3:30 p.m.</p>	<p>Empowerment Through Financial Literacy <i>Facilitator: Neil Goslin, Director, Central City Asset Building Coalition</i></p> <p>Developing Financial Literacy: Federal Deposit Insurance Corporation (FDIC) Money Smart Program <i>Willie Lake, Community Affairs Specialist, FDIC</i></p> <p>An introductory overview of the FDIC Money Smart Program, this session will focus on strategies for helping families to develop an understanding and vision for the future, empowering individuals and families to take financial control of their lives through financial literacy.</p>
<p>3:30 p.m. – 4:30 p.m.</p>	<p>Resources for Developing Community Initiatives <i>Facilitator: Harvey Britton, Outreach Coordinator, Total Community Action</i></p> <p>Developing Local EITC Initiatives: Opportunities and Challenges for Louisiana <i>Jackie Lynn Coleman, Technical Assistance Manager, National Community Tax Coalition, Center for Economic Progress</i></p> <p>The Center for Economic Progress (CEP) provides services promoting access to the EITC and CTC. Annually, the CEP hosts the national training workshop on developing EITC partnerships and initiatives. The CEP is instrumental in the development of training resources for community agencies on the EITC and CTC. This session will include a review of training resources and toolkits available to assist local communities organizing community outreach initiatives.</p>
<p>4:30 p.m. – 5:10 p.m.</p>	<p>Building the Foundation for Local Community Projects: Meeting the Challenges for Organizing Local Initiatives in Urban Settings, Medium-Sized Towns, and Rural Communities</p> <p>Participants will separate into three groups to work on planning their own local EITC initiatives. Groups will be assigned based on community size (large city, medium-sized town, rural community).</p>
<p>5:10 p.m. – 5:45 p.m.</p>	<p>Organizing Regional Community Partnerships Regional Breakout Session: Small groups will work in teams by region to develop local community outreach strategies. Teams will build on their own expertise to begin formulating strategies for an EITC initiative that is locally based, but scaleable to the State. Brainstorming and planning materials will be provided. Community project planning models, Louisiana best practices and developing new ideas will be incorporated into the local area planning session.</p>
<p>5:45 p.m.</p>	<p>Day 1 Adjournment</p>
<p>6:00 p.m. – 8:00 p.m.</p>	<p>Networking Session <i>The Louisiana Head Start Association will host this event. More details will be provided at the conclusion of the Day 1 session.</i></p>

Day Two: October 26, 2004

<p>8:00 a.m. – 8:20 a.m.</p>	<p>Building Local Initiatives: Community Project Planning <i>David Cunningham, Consultant, Self-Sufficiency Initiatives</i></p> <p>This session will focus on strategies for meeting the needs of diverse stakeholders in order to support long-term partnerships. Included will be a discussion on ways to maximize local community resources, utilize guerilla marketing, and Seven Points of Contact strategies.</p>
<p>8:20 a.m. – 9:45 a.m.</p>	<p>Developing Local EITC Initiatives: Action Planning <i>Jackie Lynn Coleman, Technical Assistance Manager, National Community Tax Coalition, Center for Economic Progress</i> <i>Kaye Schmitz, Executive Director, Real Sense Prosperity Campaign</i></p> <p>Roundtable Planning Session: Regional teams will use their work from the previous day to refine and develop a local EITC and CTC outreach initiative. Teams will be supported by workshop faculty.</p>
<p>9:45 a.m. - 10:00 a.m.</p>	<p>Break</p> <p>(All participants will have the opportunity to attend each of the two workshops. Workshop assignments will be recorded on participants ‘ badges.)</p>
<p>10:00 a.m. – 10:45 a.m.</p>	<p>Concurrent Workshop Sessions</p>
<p>Blue Group</p>	<p>Workshop I: Overview of the Tax Wise Software System <i>Diane Puderer, Senior Tax Specialist, IRS (Blue Group)</i></p> <p>This session will include an introduction to the IRS Tax Wise software and online income tax filing process. It will also include computer training modules.</p>
<p>Green Group</p>	<p>Workshop II: Developing A Mobile Multi-Community Outreach Project <i>Facilitator: Robin Taylor, Senior Tax Specialist, IRS</i> <i>Diana Behm, Special Projects Manager, Northeast Oklahoma Community Action Agency</i></p> <p>Providing –tax assistance to rural communities can be a challenge. This workshop will share information on strategies for developing and managing a Mobile Multi-Community Tax Filing Assistance Program.</p>
<p>10:45 a.m. – 11:30 a.m.</p>	<p>Concurrent Workshops</p>
<p>Green Group</p>	<p>Workshop III: Overview of the Tax Wise Software System <i>Diane Puderer, Senior Tax Specialist, IRS</i></p> <p>This session will include an introduction to the IRS Tax Wise software and online income tax filing process. It will also include computer training modules.</p>
<p>Blue Group</p>	<p>Workshop IV: Developing A Mobile Multi-Community EITC and CTC Outreach Project <i>Facilitator: Robin Taylor, Senior Tax Specialist, IRS</i> <i>Diana Behm, Special Projects Manager, Northeast Oklahoma Community Action Agency</i></p> <p>Providing tax assistance to rural communities can be a challenge. This workshop will share information on strategies for developing and managing a Mobile Multi-Community Tax Filing Assistance Program.</p>

11:30 a.m. – 11:50 a.m.	Break
11:50 a.m. – 12:20 p.m.	<p>EITC Louisiana: Resources to Support Local Community Outreach Strategies <i>Facilitator: Mary Joseph, Deputy Assistant Secretary, Louisiana Department of Social Services</i></p> <p>The Department of Social Services will unveil the EITC and CTC community initiative strategy. The presentation will include the announcement of project mini-grants, initiative logo, and discussion of the Louisiana EITC Web site and new resources for promoting client awareness of earned tax credits. The initiative is designed to enhance the ability of Louisiana 's most vulnerable families (TANF clients, Head Start families, and Food Stamp recipients) to access EITC benefits. The project also promotes local communities to undertake educational initiatives on the EITC and CTC.</p>
12:20 p.m. – 1:00 p.m.	<p>Working Roundtable: Building the Local Campaign</p> <p>Participants will collaborate on the development of their regional community strategies to promote the EITC and CTC.</p>
1:00 p.m. – 1:30 p.m.	<p>Review of the Developing New Community Initiatives</p> <p>Regional planning teams will share strategies for enhancing and/or developing local community EITC and CTC initiatives.</p>
1:30 p.m.	<p>Closing Remarks, Evaluation <i>Adren Wilson, Assistant Secretary, Office of Family Support, Louisiana Department of Social Services</i></p> <p><i>Pearl Turner, CSBG Director, Louisiana Department of Labor</i> <i>David Cunningham, Consultant, Self-Sufficiency Initiatives</i></p>
2:00 p.m.	Adjourn