



Welfare Peer Technical Assistance Network
BUILDING ASSETS FOR OKLAHOMA:
USING TAX CREDITS TO SUPPORT FAMILIES
Oklahoma City, Oklahoma
July 25-26, 2005



July 25, 2005

8:00 – 8:30 AM

Registration

8:30 – 9:00 AM

Welcome and Introductions

Howard Hendrick, Secretary of Human Services, Director, Oklahoma Department of Human Services

Norma Noble, Deputy Secretary of Commerce for Workforce Development, Oklahoma Department of Commerce

Michael Jones, Executive Director, Oklahoma Association of Community Action Agencies, Inc.

Marvin Jones, Group Leader Community Services, Cherokee Nation

John Horejsi, Federal Project Officer, Welfare Peer TA Network, Office of Family Assistance, Administration for Children and Families

9:00 – 10:00 AM

A Shared Vision for Community Economic Empowerment

EITC: Building Foundations for Family Financial Self-sufficiency

Grant E. Collins II, Deputy Director, Office of Family Assistance, Administration for Children and Families

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.

The Oklahoma Asset Building Vision

Howard Hendrick, Director, Oklahoma Department of Human Services

The Director of the Oklahoma Department of Human Services will share his vision, on behalf of the Department, regarding the role that EITC and other asset building strategies play in the strategic goal of the Department to advance self-sufficiency and independence from TANF for the largest number of citizens possible. Additionally, the Director will share his response to the federal vision presentation.

10:00 – 10:15 AM

Break

10:15 – 11:15 AM

Partnerships in Outreach and Collaboration on the EITC

Facilitator: Carol Beth Sedanko, Children and Families Program Specialist, Administration for Children and Families, Dallas Regional Office

Oklahoma Tax Assistance Partnerships

Karen O'Neill, Internal Revenue Service (IRS) Territory Manager, Oklahoma and Missouri

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 EITC project successes in Oklahoma. This presentation will also include Information about new VITA program tools and resources.

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.

11:15 – 12:00 PM

Oklahoma EITC and Asset Building Initiatives

Facilitator: Tricia Auberle, Program Manager, Oklahoma Asset Development Project, Oklahoma Association of Community Action Agencies

Twyla Gable, Community Action Agency of Oklahoma City and Oklahoma/Canadian Counties

Sherry West, Deep Fork Community Action Foundation

Pam Smith, Community Action Project of Tulsa County

Each of the programs will showcase their innovative or best practices for EITC and asset building initiatives.

**12:00 – 1:30 PM
(Working
Session)**

Refunds To Assets Program: Helping EITC Clients Build Assets

Facilitator: Joyce Jones, Ph.D., Associate Professor/FCS Personal Finance Specialist, Cooperative Extension Service, Oklahoma State University

Sondra Gayle Beverly, PhD. School of Social Welfare, University of Kansas

Helping EITC clients build and grow assets is the strategy behind the Refunds To Assets (RTA) program. This innovative program provides the convenience of splitting the income tax refund into savings and spending portions. Participants volunteer to take part in the program. The RTA program provides assistance with "self-discipline" through pre-committed savings.

1:30 – 2:30 PM

Strategies for Building EITC Community Coalitions

Facilitator: Michael Jones, Executive Director, Oklahoma Association of Community Action Agencies, Inc.

Jean Cooper, Ph.D., Executive Director, Northeast Oklahoma Community Action Agency, Inc.

The Northeast Oklahoma Community Action Agency (NEOCAA) is an innovator in the delivery of EITC outreach, community asset building and establishing business partnerships. The program has gained significant success by mining resources and program support from the local community. NEOCAA provides targeted services to Head Start parents and employers.

2:30 – 2:45 PM

Break

2:45 – 3:15 PM

Urban and Rural Community Breakout Session

Facilitator: David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives

Urban Team Leader: Jackie Lynn Coleman

Rural Team Leader: Michael McBride

This working session is designed to enable organizational representatives from metropolitan centers and those from smaller rural communities to meet and discuss the unique challenges they face in providing EITC / CTC outreach and free income tax filing services, in their respective areas.

3:15 – 4:15 PM

Empowerment Through Financial Literacy

Facilitator: Steven Shepelwich, Senior Community Affairs Advisor, Federal Reserve Bank of Kansas City

Developing Financial Literacy: Federal Deposit Insurance Corporation (FDIC) Money Smart Program

Teresa Perez, Community Affairs Specialist, Federal Deposit Insurance Corp.

This session will introduce the FDIC Money Smart Program as a strategy for helping individuals and working families develop an understanding of their financial resources. The FDIC Money Smart Program can help empower individuals and families to take financial control of their lives and become self-sufficient.

Strategies for Involving Families in Financial Literacy

Tricia Auberle, Program Manager, Oklahoma Asset Development Project, Oklahoma Association of Community Action Agencies

Involving EITC clients in financial literacy and asset development requires enthusiastic support from caseworkers and a measurable, immediate impact on clients. This session presents an innovative program originally designed by the Oklahoma Association of Community Action Agencies for Head Start Family Advocates. Caseworkers learn to identify family financial behaviors and offer alternatives. Community partners develop pilot projects that provide additional financial resources. Individual family plans are used to step family members through a process demonstrating the impact of using sound resources on the family's purchasing power.

4:15 – 4:45 PM

Resources for Developing Community Initiatives

Facilitator: Jean Cooper, Ph.D., Executive Director, Northeast Oklahoma Community Action Agency, Inc.

Developing Local EITC Initiatives: Opportunities and Challenges

Jackie Lynn Coleman, Co-Coordinator, National Community Tax Coalition and Director, Capacity Building and Training, Center for Economic Progress

The National Community Tax Coalition and the Center for Economic Progress (CEP) provides services promoting access to the EITC and CTC. Annually, the Center hosts the national conference and learning exchange on developing EITC partnerships and initiatives. The Center 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 develop and build their EITC outreach initiatives.

4:45 – 5:30 PM

Faculty Roundtable and Wrap-Up Session

Facilitator: David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives

July 26, 2005

8:30 – 9:00 AM

Building Local Initiatives: Community Project Planning

David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives

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 and employ the “Seven Points of Contact” information and marketing strategy.

9:00 – 9:45 AM

Developing Local Initiatives: Action Planning (session I)

Facilitator: David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives

Session Resource Team:

Michael McBride, IRS SPEC, Manager Rural Strategies
Eileen McCormick, IRS Senior Tax Specialist, Atlanta GA
Diana Behm, Bank of Oklahoma
Jackie Lynn Coleman, Center for Economic Progress

Roundtable Planning Session: Teams will build on strategies and discussions shared during the workshop and develop a local EITC/CTC outreach initiative. Teams will be supported by workshop faculty.

9:45 – 10:30 AM

Developing A Mobile Multi-Community Outreach Project

Facilitator: Jean Cooper, Ph.D., Executive Director, Northeast Oklahoma Community Action Agency, Inc.

Diana Behm, Assistant Branch Manager, Bank of Oklahoma (formerly EITC Coordinator with Northeast Oklahoma Community Action Agency)

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.

10:30 – 10:45 AM

Break

10:45 – 11:45 AM

Workshop I: Overview of the IRS VITA Program and their Electronic Filing System

Karen O'Neill, Internal Revenue Service (IRS) Territory Manager, Oklahoma and Missouri

This session will provide an overview on the VITA program and general information on the E-File procedures.

Workshop II: EITC/CTC Program Scale and Sustainability

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

Jackie Lynn Coleman, Co-Coordinator, National Community Tax Coalition and Director, Capacity Building and Training, Center for Economic Progress

This workshop will focus on tools and strategies to promote EITC/CTC community program sustainability. Data collection methods and standards are key strategies to generate public official and business community support for locally sustainable community initiatives.

**12:00 – 1:15 PM
(Working Session)**

EITC Oklahoma: Resources to Support Local Community Outreach Strategies / Next Steps

Tricia Auberle, Program Manager, Oklahoma Asset Development Project, Oklahoma Association of Community Action Agencies

Linda Hughes, Program Manager for TANF Services, Family Support Services Division, Department of Human Services

The OKACAA and the Oklahoma Department of Human Services (OKDHS) will provide information on the resources and tools available to support the EITC/CTC community outreach initiatives.

1:15 – 2:00 PM

Developing Local Initiatives: Building the Local Campaign (Session II)

Facilitator: David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives

Session Resource Team:

Michael McBride, IRS SPEC, Manager Rural Strategies

Eileen McCormick, IRS Senior Tax Specialist, Atlanta GA

Diana Behm, Bank of Oklahoma

Jackie Lynn Coleman, Center for Economic Progress

Roundtable planning session continued. Participants will collaborate on the development of their community initiatives and design strategies to promote the EITC and CTC.

2:00 – 2:45 PM

Review of the Developing Community Initiative Strategies

Planning teams will share strategies for enhancing and/or developing local community EITC and CTC initiatives.

2:45 – 3:00 PM

Closing Remarks and Evaluation

Judith Atkinson, Deputy Director, Field Operations Division, Oklahoma Department of Human Services

Michael Jones, Executive Director, Oklahoma Association of Community Action Agencies, Inc.

John Horejsi, Federal Project Officer, Welfare Peer TA Network, Office of Family Assistance, Administration for Children and Families