



# Georgia Earned-Income Tax Credit (EITC)/Asset-Building Statewide Coalition Meeting

Savannah, Georgia  
June 28–30, 2010



## *Final Agenda*

### Day 1—Monday, June 28 (Regency Ballroom B, Second Floor)

8:30 – 9:00 a.m.

#### ***Continental Breakfast and Registration***

9:00 – 9:20 a.m.

#### **Welcome and Opening Remarks**

- *David Camporeale*, Family Assistance Program Specialist, Office of Family Assistance (OFA), Administration for Children and Families (ACF), U.S. Department of Health and Human Services (HHS)
- *Lisa Washington-Thomas*, Chief, Technical Assistance Branch, OFA, ACF, HHS
- *Carlis Williams*, SE Regional Administrator, ACF, HHS
- *Michael Beebe*, Director, Stakeholder Partnerships, Education and Communication (SPEC) Headquarters Operations, Internal Revenue Service (IRS)
- *Teinique Gadson*, Interim Executive Director, Neighborhood Improvement Association, Inc., and Chairperson, Chatham Savannah Asset Development Coalition, Savannah, Georgia
- ***Moderator:*** *David Camporeale*

9:20 – 9:40 a.m.

#### **Plenary Address**

- *Otis Johnson*, Mayor of Savannah  
How To Get Your City Involved in Your Local Volunteer Income Tax Assistance (VITA) Campaign
- ***Introducer:*** *Teinique Gadson*

9:40 – 10:00 a.m.

#### **Overview of EITC Outreach**

Participants will learn about the Earned-Income Tax Credit (EITC) and Child Tax Credit as foundations for family self-sufficiency. Information will be provided about what EITC/asset-building coalitions are and what already exists in Georgia. The session also will include information on VITA sites and a presentation by a representative from SPEC.

- *Yolanda Davis-Weaver*, Senior Tax Consultant, SPEC, IRS
- ***Introducer:*** *David Camporeale*

10:00 – 10:45 a.m.

#### **Assets and Opportunity Scorecard**

A representative from the Corporation for Enterprise Development (CFED) will present Georgia's Assets and Opportunity Scorecard, which assesses performance in six key areas: (1) financial security, (2) business development, (3) home ownership, (4) health care, (5) education, and (6) tax policy and accountability.

- *Leigh Tivol*, Director, Savings and Financial Security, CFED
- ***Introducer:*** *David Camporeale*



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#### Day 1—Monday, June 28 (Continued) (Regency Ballroom B, Second Floor)

10:45 – 11:00 a.m.	<b>Break</b>
11:00 – 11:45 a.m.	<b>TANF Presentation</b> <ul style="list-style-type: none"><li>• <i>Teinique Gadson</i></li><li>• <i>Donna Gunter</i>, TANF Unit Manager, Office of Family Independence, Division of Family and Children Services, Georgia DHS</li><li>• <i>Erika Wiggins</i>, Consumer, Chatham Savannah Asset Development Coalition</li><li>• <b>Introducer:</b> <i>Teinique Gadson</i></li></ul>
11:45 a.m. – 12:15 p.m.	<b>VITA Site Development</b> <p>This session will provide an overview on how to start a VITA program in your community, focusing on site location, computer resources, support from local organizations, training, publicity, technical assistance, and the recruitment of volunteers.</p> <ul style="list-style-type: none"><li>• <i>Kenneth Brown</i>, Senior Tax Consultant, SPEC, IRS</li><li>• <b>Introducer:</b> <i>David Camporeale</i></li></ul>
12:15 – 1:15 p.m.	<b>Working Lunch (Scarborough Ballroom, Lobby Level)</b> <p>This working lunch session will provide an opportunity to learn more about current community resources and the ways that organizations can apply for Federal, State, and foundation grants that can be used to support community tax assistance initiatives.</p> <ul style="list-style-type: none"><li>• <i>Beverly Santicola</i>, President, U.S. Government Grants</li><li>• <i>MarRonde Lotson</i>, Director of Economic Development, City of Savannah</li><li>• <b>Moderator:</b> <i>Eric Blanchette</i>, Regional Program Manager, Region IV, Child Care Bureau, OFA, ACF, HHS</li></ul>
1:15 – 2:15 p.m.	<b>Developing an EITC and Asset-Building Statewide Coalition</b> <ul style="list-style-type: none"><li>• <i>Julie Farwell</i>, Statewide EITC Coordinator, Community Action of Nebraska</li><li>• <i>Gena Gunn</i>, Project Director and Director of Asset Building in States and Coalitions, Center for Social Development, Washington University in St. Louis</li><li>• <i>Peter Ruark</i>, Research Associate, Michigan League for Human Services</li><li>• <b>Moderator:</b> <i>Tammie Collins</i>, Executive Vice President, Community Impact, United Way of Central Georgia</li></ul>
2:15 – 2:30 p.m.	<b>Break</b>



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#### Day 1—Monday, June 28 (Continued)

2:30 – 4:30 p.m.

The two concurrent sessions noted below are for participants who (1) have current coalitions and (2) are interested in starting coalitions.

#### ***Concurrent Session One: Incorporating Asset-Building Into Your Coalition and VITA Program (Regency Ballroom B)***

This session will address the following issues.

- An overview of the Federal Deposit Insurance Corporation (FDIC) Money Smart Program and a focus on strategies for helping families develop an understanding and vision for the future and for empowering individuals and families to take financial control of their lives through financial literacy
  - Penny King, Community Affairs Specialist, FDIC
- Engagement with financial institutions
  - Daniel Dodd, Director, Step Up Savannah, Inc.
  - Cassandra Brown, AVP Marketing and Business Development, Credit Union of Atlanta
- Individual Development Accounts (IDAs)
  - Stefanie Whorton, Assets for Independence Resource Coordinator, Office of Community Services, ACF, HHS
  - Joy Hunt, Program Associate, Oregon State IDA Initiative
- **Moderator:** Laura Lester, Advocacy and Education Director, Atlanta Community Food Bank

#### ***Concurrent Session Two: Establishing an EITC Campaign in Your Community and Building Effective Partnerships (Regency Ballroom D)***

- Kaye Schmitz, Executive Director, Florida Prosperity Partnership
- Richard Keith, Special Projects Manager, Office of Financial Empowerment, San Antonio Department of Community Initiatives
- Tiki Windley, Program Manager, MDC, Inc.
- Suzann Knight, Extension Specialist, Family Resource Management, New Hampshire Statewide EITC Alliance
- **Moderator:** Carter Elliott, Manager, Atlanta Prosperity Campaign

4:30 p.m.

***Adjourn for the Day***



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#### Day 2—Tuesday, June 29 (Regency Ballroom B, Second Floor)

8:30 – 9:00 a.m.

#### ***Continental Breakfast and Networking***

9:00 – 9:15 a.m.

#### **Day 1 Reflection Session**

Participants will have an opportunity to share feedback from the Day 1 sessions and discussions.

- ***Moderator:*** *David Camporeale*

9:15 – 9:30 a.m.

#### **EITC and VITA—Providing Services to Individuals With Disabilities**

This session will provide an overview of the services offered by the Center for Financial Independence and Innovation, Inc. (CFII), and the technical assistance that it can provide to coalitions, including disability sensitivity training and people-first language; tax credits and benefits for individuals with disabilities; and funding availability (possibly through grant partnerships), accommodations for those with visual or print impairments (e.g., Braille, large print, CDs), and efforts to reach out to the deaf community (e.g., partnerships for interpreters).

- *Jackie Wilks-Weathers*, Executive Director, CFII
- ***Introducer:*** *David Camporeale*

9:30 – 10:00 a.m.

#### **TaxWise as a Resource for Developing Information, Using Data Resources, and Tracking the Statewide Impact of EITC Community Outreach Initiatives**

This session will include an overview of the TaxWise software and will provide insights on the efficient and effective use of the program. The TaxWise software database can also be an additional management tool for agencies serving VITA clients. Information from TaxWise can assist organizations in gathering statistical data for the development of reports, which can help demonstrate the affirmative impact that free income tax services can have on a community. This session will also include an overview of computer-training modules.

- *Kim Manuel*, Vice President, Customer Relations, CCH Small Firm Services
- *Jo-Anne Butler*, Senior Tax Consultant, SPEC, IRS
- ***Moderator:*** *Cicely Garrett*, VITA Coordinator, Atlanta Prosperity Campaign

10:00 – 10:15 a.m.

#### ***Break***



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#### Day 2—Tuesday, June 29 (Continued)

10:15 – 11:45 a.m.

#### **Building Successful Coalitions (Concurrent Sessions)**

Two concurrent sessions will be held for participants who (1) [have current coalitions](#) and (2) [are interested in starting coalitions](#).

#### ***Concurrent Session One: Reaching Rural, Mobile, and/or Underserved Areas (Regency Ballroom B)***

Providing tax assistance to rural communities can be a challenge. This workshop will share information on strategies for developing and managing a multicompany tax filing assistance program.

- *Tom Jacobson and Karen Heisler*, Rural Dynamics, Inc.
- *Mike Monahan*, Georgia Legal Services
- *Jean Cooper*, Northeast Oklahoma Community Action Agency
- **Moderator:** *Eric Blanchette*

#### ***Concurrent Session Two: How Elected Officials and Community Tax Assistance Sites Can Work Together To Support Working Families (Regency Ballroom D)***

- *Jackie Lynn Coleman*, Senior Director, National Community Tax Coalition, and Vice President, National Programs, Center for Economic Progress
- *Laura Hayes*, Senior Associate, Hatcher Group
- *Steve Holt*, Consultant, HoltSolutions
- **Moderator:** *Tammie Collins*

11:45 a.m. –  
12:45 p.m.

#### ***Working Lunch: ARRA and VITA Funding (Scarborough Ballroom, Lobby Level)***

This working lunch session will provide an opportunity to learn more about the availability of American Recovery and Reinvestment Act (ARRA) funds through the Georgia DHS (e.g., Supplemental Nutrition Assistance Program, Temporary Assistance for Needy Families [TANF] program) and the ways that organizations interested in operating a coalition can apply for VITA grant funding.

- *Donna Gunter*
- *Sharon Alley*, Tax Analyst, VITA Grant Program, IRS
- **Moderator:** *Eric Blanchette*

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Day 2—Tuesday, June 29 (Continued) (Regency Ballroom B, Second Floor)

12:45 – 2:15 p.m.

**Creating New Ways To Recruit Volunteers and To Market VITA Sites**

This session will provide an opportunity for participants to learn about innovative strategies, resources, and lessons learned around marketing, outreach, and the recruitment of volunteers.

- *Cicely Garrett*
- *Richard Cramer*, State Coordinator, Tax-Aide Program, AARP Foundation
- *Michael Devault*, Cobb County School District
- *Kari Finley*, Financial Services Manager, Goodwill Industries of the Southern Rivers
- **Moderator:** *Cicely Garrett*

2:15 – 3:00 p.m.

**Question-and-Answer Session—Respond to Questions That Have Been Raised by Attendees During This Session**

- *Kenneth Brown*
- *Carter Elliott*
- *Tammie Collins*
- **Moderator:** *David Camporeale*

3:00 – 3:15 p.m.

**Break**

3:15 – 4:15 p.m.

**Group Interactive Feedback Session**

This interactive session will provide Georgia participants and speakers with a chance to provide initial feedback on forming their statewide coalition and additional goals that they may have.

- **Facilitator:** *David Camporeale*

4:15 – 4:30 p.m.

**Day 2 Wrap-Up**

4:30 p.m.

**Adjourn for the Day**

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Day 3—Wednesday, June 30 (Regency Ballroom B, Second Floor)

8:00 – 8:30 a.m.

***Continental Breakfast and Networking***

8:30 – 9:30 a.m.

**Developing Business Partnerships**

This presentation will highlight the important role that employers and business leaders can have in facilitating information dissemination and educational outreach regarding work support programs for low-income earners.

- *John Wilcox*, Deputy Director, Corporate Voices for Working Families
- *Jeffrey Thompson*, Training Coordinator, Tyson Foods, Inc.
- *Nancy Russell*, Chief Financial Officer, Landau Uniforms, Inc.
- ***Moderator: Carter Elliott***

9:30 – 10:30 a.m.

**Benefit Assistance Screening**

Participants will learn about the Georgia COMPASS (Common Point of Access to Social Services) system and the ways that it can be used to assist clients in applying for benefits. This presentation will also highlight United Way 2-1-1 and the ways that nonprofit organizations can use this resource to assist clients in understanding what benefits they may be able to receive and how to apply for assistance.

- *Lucy Smith*, Food and Nutrition Unit Manager, Georgia DHS
- *Skye Thompson*, Benefits Outreach Coordinator, Atlanta Prosperity Campaign
- *Monica Hammond*, 211 Outreach Marketing Manager, United Way of Metropolitan Atlanta
- ***Moderator: Laura Lester***

10:30 – 10:45 a.m.

***Break***

10:45 a.m. –  
12:00 noon

**Action Planning: Next Steps for Coalition**

This action planning timeframe will allow the Georgia coalition to determine the next steps in further developing the coalition.

- ***Facilitators: Tammie Collins, Teinique Gadson, and Laura Lester***

12:00 noon –  
1:00 p.m.

***Working Lunch***

Action planning will be continued.

- ***Facilitator: David Camporeale***

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**Day 3—Wednesday, June 30 (Continued) (Regency Ballroom B, Second Floor)**

**1:00 – 1:15 p.m.**

**Closing Remarks**

- *David Camporeale*

**1:15 p.m.**

***Adjournment***