



Welfare Peer TA Network Webinar

Engaging Temporary Assistance for Needy Families (TANF) Participants in Tax Filing Assistance

Wednesday, January 30, 2013; 1:00 – 2:30 p.m. Eastern Time

Presenters:

- James Butler, Office of Family Assistance, Administration for Children and Families
- Maisha Thoms, Nehemiah Gateway Community Development Corporation
- Thomas Hall, Delaware Division of Social Services
- Beckie Harrell, Internal Revenue Service
- Lesley Smith, Moderator, ICF International

Welcome! The session will start momentarily.



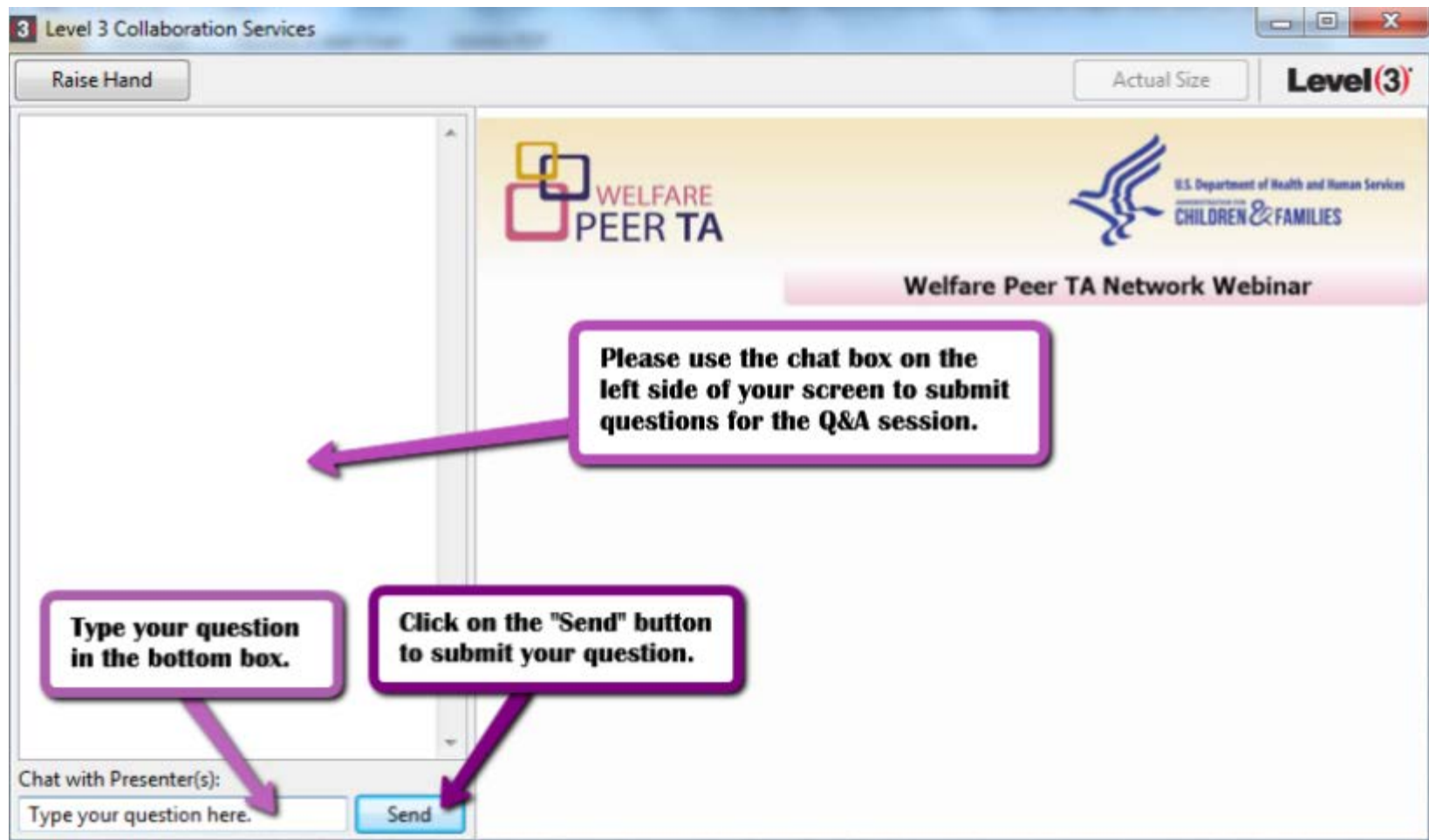
Welfare Peer TA Network Webinar

Welcome and Introductions:

James Butler
Federal Project Officer
Office of Family Assistance

Welfare Peer TA Network Webinar

How Do I Ask a Question?



The screenshot shows a web browser window titled "Level 3 Collaboration Services". The main content area displays the "Welfare Peer TA Network Webinar" header with logos for "WELFARE PEER TA" and the "U.S. Department of Health and Human Services ADMINISTRATION FOR CHILDREN & FAMILIES".

Three instructional callouts are present:

- A purple box with an arrow pointing to the left side of the screen: **Please use the chat box on the left side of your screen to submit questions for the Q&A session.**
- A purple box with an arrow pointing to the text input field: **Type your question in the bottom box.**
- A purple box with an arrow pointing to the "Send" button: **Click on the "Send" button to submit your question.**

At the bottom of the interface, there is a chat area labeled "Chat with Presenter(s):" containing a text input field with the placeholder "Type your question here." and a blue "Send" button.



Welfare Peer TA Network Webinar

Maisha Thoms

*Program Director, Nehemiah Gateway
Community Development Corporation*

Thomas Hall

Delaware Division of Social Services

“Engaging Temporary Assistance for Needy Families (TANF) Participants in Tax Filing Assistance”

Maisha Thoms, Delaware EITC
Campaign Director and Thomas Hall,
Delaware Division of Social Services



Community Development Corporation

201 W 23rd Street
Wilmington, DE 19802

Who Is Nehemiah Gateway?

Nehemiah Gateway Community Development Corporation (NGCDC) is a 501(c)(3) non-profit organization whose mission is to provide access to financial education and services for low to moderate income individuals. Incorporated in 2000, the organization offers a variety of programs focused on increasing the financial well-being of its customers through engaging them in strategies for asset development, financial management and successful entrepreneurship. NGCDC has conducted the Delaware EITC Campaign “Free Tax Preparation” for the last twelve years. The Nehemiah Gateway Community Development Corporation is a project of Shiloh Baptist Church, Delaware's oldest Black Baptist church.

What Is EITC and Who Qualifies?

- 1) The Earned Income Tax Credit (EITC) is a refundable Federal income tax credit for low to moderate income workers. Congress originally approved the tax credit legislation in 1975 in part to offset the burden of Social Security taxes and to provide an incentive to work. When EITC exceeds the amount of taxes owed, it results in a tax refund to those who claim and qualify for the credit.
- 1) Many people will qualify for the first time this year due to changes in their earnings, parental status, or marital status. It's a good reason to check eligibility each year because one can move into and out of EITC eligibility based on changes in your earnings, your parental status, your marital status, or changes made to EITC dollar qualifying amounts.

What Can the EITC Do for TANF Participants?

- 1) The EITC increases the ability of workers in lower paying job categories to support themselves and their families.
- 2) Research clearly shows that helping a person reap additional tax benefits based on the amount they earn has increased the labor force participation of lower skilled workers, especially single mothers.
- 3) The 35-year history of the EITC has successfully lifted more children out of poverty than any other social program or category of programs.
- 4) Without the EITC, the poverty rate among children in the United States would be 25% higher.
- 5) Lastly, the EITC can reduce participation in welfare and food stamps, and reduce the housing affordability burden of low income households.

NGCDC Site Locations

New Castle County, Delaware

- Bear Library: 101 Governor's Place, Bear, DE
- Claymont Community Center: 3301 Green Street, Claymont, DE
- Ezion Mt. Carmel Church: 800 N. Walnut Street, Wilmington, DE
- Goodwill – Lea Boulevard: 300 E. Lea Boulevard, Wilmington, DE
- Hudson State Service Center: 501 Ogletown Road, Newark, DE
- Newark Public Library: 750 Library Avenue, Newark, DE
- Rosehill Community Center: 19 Lambson Lane, New Castle, DE
- Woodlawn Library: 2020 W. 9th Street, Wilmington, DE

NGCDC Site Locations – Continued

Kent and Sussex Counties, Delaware

- Central Sussex Building: 211 N. Race Street, Georgetown, DE
- First State CAA – Dover: Blue Hen Corporate Center, 655 S. Bay Road, Suite 4J, Dover, DE
- First State CAA – Georgetown: 308 N. Railroad Avenue, Georgetown, DE
- First State CAA – Long Neck: 32980 Shoppes at Long Neck, Millsboro, DE
- First State CAA – Seaford: 2 Chandler Street, Seaford, DE
- Goodwill – Milford: 694 N. Dupont Highway, Milford, DE
- Modern Maturity Center: 1125 Forrest Avenue, Dover, DE
- Wilmington University – Dover Campus: Route 13 and Scarborough Road, Dover, DE

NGCDC Bilingual Sites

New Castle County, Delaware

- Woodlawn Library – Wilmington, DE

Sussex County, Delaware

- Central Sussex Building – Georgetown, DE

Marketing Efforts

- Word of Mouth – Top Marketing Effort
- January Letter from Delaware Division of Social Services – Received by 100K people
- Client Flyer – 30-50K distributed
- Postcard to returning clients – 10-15K distributed
- EITC Awareness Day Press Conference – Annual Event
- Street Team Delivery
- Site Partner Distribution
- Local Businesses/Community Centers

What Impact Do NGCDC's Marketing Efforts Have?

- Drive traffic to our sites;
- Allow us to complete 10-15K returns per filing season;
- Allow us to open 370-plus new deposit accounts, fulfill 300-plus requests for financial education, and distribute over 10,000 Financial Resource Booklets; and
- Allow more Delawareans to access EITC benefits. According to the IRS, more than 8% of Delaware's EITC returns were filed through volunteers compared to 1%-3% in surrounding States.

Coalition Partners

- Delaware Alliance for Community Advancement (DACA)
- First State Community Action Agency (FSCAA)
- Stand By Me
- United Way of Delaware

Partners

As the saying goes, it takes a village....and our partners make things happen!

Our Partners: Advent Financial Services, AIG Federal Savings Bank, Artisans' Bank, Bank of America, Barclay's, Citi Foundation, City of Wilmington, Delaware 2-1-1, Delaware State University, Delaware Department of Health and Social Services, Discover Bank, Doorways to Dream, E.I. DuPont De Nemours & Company, Governor Jack Markell, HSBC Bank, Internal Revenue Service, JPMorgan Chase, Kenny Family ShopRite Supermarkets, M&T Bank, New Castle County, SSD Technology Partners, United Way of Delaware, University of Delaware, Wachovia Wells Fargo Foundation, Widener School of Law, Wilmington University... and many more.

From marketing and PR to volunteers and tax site facilities, our partners' contributions are instrumental to our programs. Whether for-profit or non-profit, faith based or secular, small business or large, we couldn't do it without the participation of our partners.

Increasing Partnership Participation

- Increasing partnership participation, particularly funding and volunteers, is probably one of the hardest things to do in today's landscape. We, at NGCDC, day in and day out strategize on how to continue to grow meaningful partner relationships. Please spread the word about us, and if anyone on this call is interested in partnering with us, please feel free to contact us anytime.
- Next, you will hear from one of our partners – Delaware Division of Social Services.

31 Del C. § 503

During the month of January, the Department shall send a notice to recipients paid by the Department under this subsection in the form of:

- (1) Any notice available from the Internal Revenue Service concerning the EIC, including but not limited to the notice of a possible Federal tax refund due to the earned income credit; or
- (2) A notice developed by the Department which shall include the maximum earned income credit and the maximum earnings to which such tax credit shall apply, as determined by the federal government.



Delaware Division of Social Services
Policy and Program Development Unit

January Letter: Recipients

- TANF
- RCA
- General Assistance
- Food Benefits/SNAP
- Most Medicaid plans, including the Delaware Healthy Children's Program or CHIP



January Letter: Contents

- EITC income limits
- The maximum amount a family could expect to receive based on family size
- Some conditions of eligibility
- Information about free tax preparation sites
- Information about free web-based tax sites
(myfreetaxes.com/Delaware)
- Required documents



Activities at Local DSS Offices

- Annual administrative notice
- Workers asked to engage clients about EITC
- Posters promoting EITC
 - Resource: EITCoutreach.org
- Tax forms available
- Free tax preparation sites



Wrap-Up

- None of this would be possible, of course, without the dedication of hundreds of volunteers and donations from financial institutions, foundations, and the United Way.
- While the typical private firm charges at least \$200 per return filed, NGCDC spends \$44 of staff time per return... including financial counseling. All because trained volunteers provide more than \$2 million of tax services.
- Almost \$15 million of 2011 Federal refunds were claimed from returns prepared by NGCDC's volunteers which included \$6.3 million in EITC credits. The total economic impact of the refunds exceeds \$24 million.
- EITC funnels billions of dollars into low income communities, both urban and rural, in the form of consumer spending and asset building with a modest flow of State and local tax revenue generated.
- Finally, all TANF participants should explore their eligibility for EITC by visiting a local tax site between January and April, have their taxes done for free, and claim credits that they deserve!

Contact Information

Maisha Thoms – Nehemiah Gateway

Phone: 302-655-0803

E-mail: mthoms@nehemiahgateway.org

Web site: www.nehemiahgateway.org

Thomas Hall – Delaware Division of
Social Services

Phone: 302-255-9605

E-mail: thomas.hall@state.de.us

Web site: www.dhss.delaware.gov





Welfare Peer TA Network Webinar

Beckie Harrell
Internal Revenue Service



Engaging TANF Participants in Tax Filing Assistance

Welfare Peer TA Webinar
January 30, 2013



Internal Revenue Service

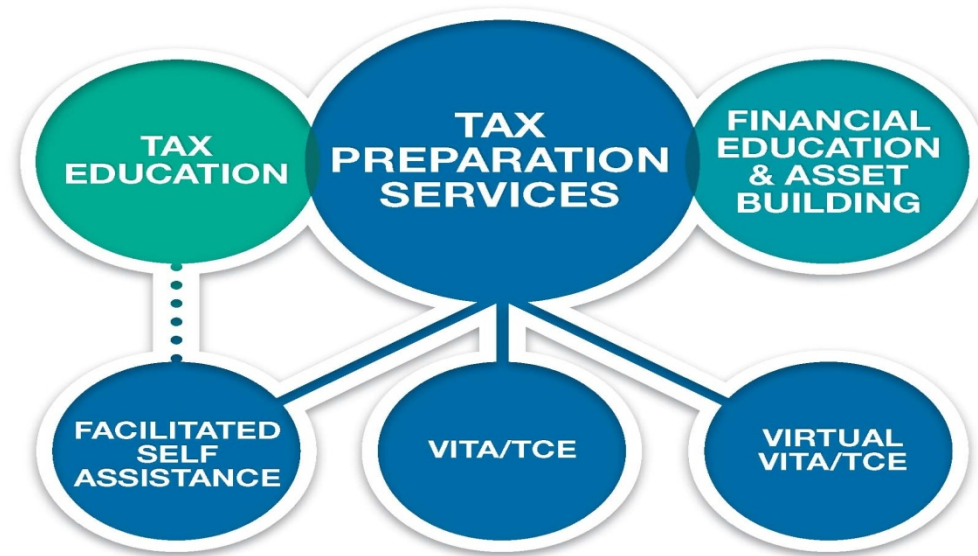
- In the IRS, the Wage and Investment (W&I) Division provides tax processing, compliance, and customer service for virtually 123 million individual taxpayers.
- W&I includes five campuses that process tax returns and other tax documents, 25 sites that provide account management (toll-free and correspondence) 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 American, 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

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





2013 Filing Season Opportunities

Partnership Strategies

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



2012 Filing Season Review

2012 Filing Season Results



2012 Filing Season Review

- Volunteers – 90,000
- Free Tax Prep Sites – 13,143
- Volunteers prepared 3,160,512 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



The Market for Free Volunteer Tax Services Is Substantial

- Between 16-19 million taxpayers meet the free tax preparation criteria
- 19 million low-income taxpayers (<\$36K) indicated an awareness and desire for volunteer tax services
 - According to IRS Research (Benchmark Survey)
- Almost 90,000 volunteers prepared more than 3.2 million returns in 2012
- Based on the above, more than 16 million taxpayers must find alternatives to free volunteer tax prep
- There are more than 13,000 VITA and TCE sites nationwide
- 20% of all EITC Eligible taxpayers fail to claim the Credit
- 70% of all EITC Claimants pay fees for return prep services



Filing Taxes Is a Crucial Component of Financial Education

- Teaching taxpayers to file their own return builds knowledge about their taxes and how they are calculated
- Empowering taxpayers is the first step towards filing future returns independently



Alternative Model #1

Free Tax Preparation

Facilitated Self Assistance Model (FSA)



Facilitated Self-Assistance (FSA): What Is It?

- Similar to other forms of assisted self-service (e.g. gas station, grocery store)
 - One-to-many model (versus traditional one-to-one)
- *Taxpayers* input their own return data
 - Taxpayers use interview-based software
 - Certified volunteers are available at all times
 - VITA Basic is minimum volunteer certification
- Computers can be set up:
 - As a standalone model; or
 - At an existing VITA/TCE site to increase capacity at peak times



What Are the Benefits of a Facilitated Model?

For sites:

- Prepare more returns
- Target more taxpayers with complex returns for direct help
- Reduce wait times during peak
- Provide taxpayers with a choice of service
- Returns counted towards site total
- Federal and State returns are free
- Can use one or multiple SIDNs (for mobile FSA sites)

For taxpayers:

- Leverage current computer skills
- Access to brand-name tax software
- Ability to consult with a certified VITA volunteer for questions
- Increased knowledge about their returns
- Increased confidence upon completion of returns
- First step towards self-sufficiency in return filing



How Do Taxpayers File their Returns?

- **VITA Free File (Formerly FAST)**
 - **30 States/Multiple Offers**
- **MyFreeTaxes (Formerly Beehive)**
 - **Now with United Way**
 - **50 States/One Offer**
- **I-CAN Sponsored by LASOC**
 - **Now under Legal Genie**
 - **12 States/One Offer**
- **The Benefit Bank Counselor Driven Model**
 - **15 States/One Offer**



Alternative Model #2

Free Tax Preparation

Virtual VITA or Virtual TCE



What Are Barriers to Accessing Traditional VITA/TCE Sites?

- Taxpayers and partners are located in remote rural areas
- Lack of certified volunteers
- Taxpayers with disabilities
- Transportation barriers
- Language barriers
- Hours of availability



What Is Virtual VITA/TCE?

- **Two organizations partner through the incorporation of two components:**
 - Intake Site
 - Preparation Site
- **SPEC advocates new methods for return preparation**
 - Video Conferencing – SKYPE
 - More Traditional Technology – Fax, E-mail
- **Territory Manager Approval Required**
 - Operating Plan
 - Flexibility
 - Support



What Are the Benefits?

- **Expanded Service**
 - Keep one-person sites open
 - Inner city/urban and rural locations
 - Underserved areas
- **Computer Utilization**
- **Volunteer Time Allocation**
 - Solution for “no show” problem or slow time
 - Better skill matching
 - Bridge for Certified volunteers at Intake Sites with no tax preparation
- **Physical Space**
 - Requires less space



Intake Site Procedural Overview

- Explains process and secures signed taxpayer consent form
- Verifies taxpayer identity
- Assists with preparation of intake form
- Obtains taxpayer's required documents
- Coordinates appointment schedule
- Forwards copies of taxpayer documents to the preparation site
- Assists taxpayer with signing required forms
- An IRS-certified volunteer at the intake site may do the quality review
- Faxes, e-mails or mails the 8879s (with required attachments) to preparation site for e-file transmission
- Does not answer tax questions or give tax advice
 - *unless* IRS-certified



Preparation Site Procedural Overview

- Coordinates volunteer schedules
- Reviews intake sheet and taxpayer documents
- Contacts taxpayer to conduct interview
- Prepares the tax return
- Contacts taxpayer to conduct a quality review of the return
- Sends the tax return back to the intake site for signature
- E-file tax return upon obtaining signed Form 8879

- Create a plan:
 - Identify partners – virtual
 - Location for computers, equipment
 - Hours of operation
 - Number of computers and volunteers
- Contact your SPEC Relationship Manager
- Create marketing plans to target potential clients



What Is SPEC's Role?

- Identify areas with low coverage rates
- Reach out to partners in these areas
- Assist in matching and linking partners
 - Intake site
 - Preparation site
- Provide support to ensure success
- SPEC-HQ will coordinate to obtain an SIDN and ensure you have the customized links needed to count your returns
- Ensure each computer terminal has access to the unique URL for your site



IRS Free Tax Prep Resources

VITA Site Locations

- o 800-906-9887 or
- o www.irs.gov

AARP Site Locations

- o 888-227-7669 or
- o www.irs.gov

Taxpayer Assistance Center (TAC) Locations

- o 211 or 311 or
- o www.irs.gov

TaxWise Help

- o 800-411-6391

Free File

- o www.irs.gov



VITA or TCE Questions?

- **Dan Maier** – Tax Analyst, National Partnerships
404-338-9021
Daniel.F.Maier@irs.gov

- **Beckie Harrell** – Senior Tax Analyst, National Partnerships
404-338-8325
rebecca.harrell@irs.gov



Reaching Out to Promote the Credits in 2013



EITC 2013 Key Messages

“Four of five eligible workers claim and get their EITC. See if you qualify at www.irs.gov.”

“You earned it. Now file, claim it and get it.”

“If you work, EITC can be a boost to you, your family and community.”

For working people, “Life's a little easier with EITC.”

“If you worked and earned under \$50,000, you may be eligible for EITC.”



IRS Outreach Support

- 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



Partner with IRS SPEC

The screenshot shows a Windows Internet Explorer browser window with the following elements:

- Address Bar:** <http://www.irs.gov/Individuals/Become-an-IRS-Partner-to-Help-in-Your-Community>
- Navigation:** Back, Forward, Stop, Refresh, Home, Live Search.
- Menu Bar:** File, Edit, View, Favorites, Tools, Help.
- Taskbar:** Shows several open windows including "Home - National Relationshi...", "Free Hotmail", and the current page "Become an IRS Partner to Help in Your Community".
- Page Content:**
 - Header:** IRS logo, Subscriptions, Language, Information For..., Search, Advanced.
 - Navigation Tabs:** Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, for Tax Pros.
 - Left Sidebar:** Employees, Self-Employed, International Taxpayers, Military, Parents, Seniors & Retirees, Students.
 - Main Content:**
 - ## Become an IRS Partner to Help in Your Community
 - 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 \$50,000. 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?



IRS Outreach Resources

The screenshot shows a Windows Internet Explorer browser window displaying the IRS Outreach Corner website. The browser's address bar shows the URL <http://www.irs.gov/Individuals/Outreach-Corner>. The website features the IRS logo and a navigation menu with categories such as Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. A search bar is located in the top right corner. The main content area is titled "Outreach Corner" and includes a sub-header "Find it easy to spread the word about key income tax topics!". Below this, there is a paragraph explaining the purpose of the page and a list of "Drop-in Articles - Perfect for partner publications that reach taxpayers". The list includes links to various articles such as "Choose your tax volunteer role and make a difference", "IRS offers assistance for people with disabilities", "Charitable contributions may help lower your tax bill", "Bartering and trading? Each transaction is taxable to both parties", "Five important tips on gambling income and losses", and "IRS can help when disasters strike". The browser's taskbar at the bottom shows several open applications, including Microsoft Office Word and Outlook, and the system tray displays the time as 11:11 AM.

Outreach Corner

Find it easy to spread the word about key income tax topics!

This page offers you electronic communication materials to use in reaching out to the people you serve. Get free news you can use each month, targeted by time of year to coincide with what your customers, employees, volunteers, etc. need to know about new tax law legislation, IRS events and other activities that affect them.

Please feel free to use these items for your websites, in electronic products, publications, etc. as needed. More items will be added each month. Submit your suggestions for topics you would like to see. Please send any feedback to us at [this email address](#). [Subscribe now](#) to receive email alerts when this page is updated!

November 2012

Drop-in Articles - Perfect for partner publications that reach taxpayers

- [Choose your tax volunteer role and make a difference](#)
- [IRS offers assistance for people with disabilities](#)
- [Charitable contributions may help lower your tax bill](#)
- [Bartering and trading? Each transaction is taxable to both parties](#)
- [Five important tips on gambling income and losses](#)
- [IRS can help when disasters strike](#)



The screenshot shows the EITC Central website interface. At the top, it says "Life's a little easier with eitc" with the EITC logo. Below this are navigation tabs: "EITC CENTRAL", "TAX PREPARED TOOLS", "PARTNER TOOLKIT", and "MARKETING EXPRESS". The main content area features a large image of a woman kissing a child on the cheek. The text reads: "Now it's easier to spread the word about the Earned Income Tax Credit". Below this, there is a section titled "Hot Topics For Our Partners" with a list of links: "Government Agencies and Offices", "Employers", "EITC Awareness Day", "Basic Marketing & Communication Materials", "Tired and True Tips", "Fact Sheets", "Publications and Products", "IRS.gov Partner Page", "Special Outreach Project with California", and "Special Outreach Project". There is also a "Hot Topics:" section with a link to "Visit our Hot Topics for Our Partners page" and two columns of bullet points under "Other Resources".

- News release templates
- Articles
- Fact sheets
- Technical information
- Local statistics
- Hot topics



How to Order Products



Life's a little easier with



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 Manager
- EITC Central

- Sample tweets
- YouTube videos
- Podcasts
- News Releases
- PSAs
- On-hold messages





Sample Tweets

Earn \$50,000 or less last year? You may qualify for #EITC. Don't miss out, check it out at <http://go.usa.gov/1Jd> #IRS #taxes #refund



If your earnings decreased in 2012 you may qualify for #EITC and a refund. Check it out at <http://go.usa.gov/1Jd> #IRS #refund #taxes

#EITC can increase your tax refund as much as \$5,800. Do you qualify? <http://go.usa.gov/1Jd> #taxes #tax #refund #IRS

4 out of 5 people claim Earned Income Tax Credit. Are you one of them? Check out #EITC www.irs.gov/eitc. #IRS #TAX #CREDIT

It's not too late to claim your #EITC if you qualified for the credit in the past 3 years but did not apply. Visit www.irs.gov #IRS

Millions of workers will qualify for #EITC for the 1st time this year. Earn under \$50,000? Check it out at <http://go.usa.gov/1Jd> #IRS



2013 EITC Awareness Day and Beyond

Internal Revenue Service





EITC Awareness Day 2013

- January 25, 2013 has been proclaimed as EITC Awareness Day
- EITC Awareness Day is a one-day blitz throughout mainstream and social media
- Encourage all of your partners to get involved on that day and continue to raise awareness about EITC throughout the year
- To get involved, write to find your local SPEC partner at partner@irs.gov



How Can You Help?

- Provide tax publications and IRS products in offices
- Make fliers available at recruitment efforts, home visits, resource centers, program newsletters and parent involvement activities
- Incorporate the Credit into the family assessment and partnership building process
- Post information about the EITC in prominent places
- Provide EITC educational materials in mailout to families
- Staff can learn about EITC to assist families with basic EITC eligibility screening



For More Information

You Can Make a Difference.

Thank you!!!

Beckie Harrell
Senior Tax Analyst
Stakeholder Partnerships, Education & Communication
National Partnerships
Rebecca.Harrell@irs.gov
(404) 338-8325



U.S. Department of Health and Human Services
ADMINISTRATION FOR
CHILDREN & FAMILIES

Welfare Peer TA Network Webinar

Resources

Your Money.
You Earned It.



**Now
Claim It!**

Promote the Earned Income Credit and Child Tax Credit

John Wancheck

Center on Budget & Policy Priorities

Phone: 202-408-1080

E-mail: wancheck@cbpp.org

The Center on Budget and Policy Priorities' **National Tax Credit Outreach Campaign Can:**

- ❑ Provide Tax Credit Outreach Kits
- ❑ Arrange a conference call or Webinar to help organizations develop an outreach strategy
- ❑ Connect you to online resources:
 - EIC/CTC flyers in 21 languages
 - EIC Estimator
 - Searchable Outreach Strategies Database
 - Sample Press Release
 - EIC & CTC FAQs and much more!

www.eitcoutreach.org

Connecting with a Coalition

There may be one in your hometown!

Directory of local partnerships, by State:

The National EITC Partnership Web site:

www.cbpp.org/eitc-partnership

1. Spreadsheet with coalition members, chairperson to contact
2. Goals and activities of coalition



Welfare Peer TA Network Webinar

Want to learn more about this topic?

The following slides outline some useful resources about the Earned Income Tax Credit (EITC) and tax filing assistance that currently appear on the [Welfare Peer TA Network Web site](#) and [Self-Sufficiency Research Clearinghouse](#).

Welfare Peer TA Network Webinar

Earned Income Tax Credit (EITC): An Overview

- Background information on the EITC, as well as eligibility and qualifications for the EITC can be found here.

EITC Central

- The IRS provides EITC Central, which hosts the Partner Toolkit, the Tax Return Preparer Toolkit, Marketing Express, and Information for the Press. EITC Central includes the latest EITC news and updates, EITC statistics, and widgets, banner ads, radio, TV PSAs, and ready-made publications and products to use in your EITC outreach campaign.

The Role of Earned Income Tax Credit in the Budgets of Low-Income Families

- The annual receipt of large tax refunds, primarily due to the Earned Income Tax Credit (EITC), provides families with an unusual opportunity to save and build assets. In 2007, a short survey was conducted, followed by in-depth interviews with 194 African-American, Latino, and White parents who received EITC with refunds of at least \$1,000. Results of this study are discussed in depth in this paper.



Welfare Peer TA Network Webinar

[Earned Income Tax Credit \(EITC\) – Use the EITC Assistant to Find Out if You Should Claim It](#)

- This EITC Assistant is from the IRS and provides eligibility information for the EITC in tax year 2011 and 2012. By providing basic income information, the program can help determine correct filing status and whether children qualify, and it can also estimate the amount of credit that someone may receive.

[Ten Years of the EITC Movement: Making Work Pay Then and Now](#)

- The Brookings Institution authored this brief on the Earned Income Tax Credit (EITC) since the inception of the “EITC Movement” ten years ago. Authors review the past accomplishments of the EITC Movement and discuss how the Movement will continue to support working families in the future, building on lessons learned.

[Studies Show Earned Income Tax Credit Encourages Work and Success in School and Reduces Poverty](#)

- Some 27 million working adults with low and moderate incomes, most of whom are raising children, received the Earned Income Tax Credit (EITC) in 2009 to reduce their taxes and supplement their earnings. Studies have found that the EITC encourages work, reduces poverty, helps families meet basic needs, and improves children’s achievement in school and likely increases their earnings as adults.



Welfare Peer TA Network Webinar

Helpful Web sites:

[EITC Central](#)

- All your Earned Income Tax Credit needs in one central location for IRS partners, employers, government agencies and offices, and tax preparers. This site hosts the Partner Toolkit, the Tax Return Preparer Toolkit, Marketing Express and Information for the Press.

[Child Related Tax Benefits Comparison](#)

- A convenient and quick chart showing some of the basic eligibility requirements for tax benefits available to taxpayers with a qualifying child in 2012.

[EITC Income Limits and Maximum Credit Amounts](#)

- Income and family size determine the amount of the EITC. The income amounts and the amount of EITC are adjusted for inflation each year. See the 2012 tax year income limits and maximum credits for 2012.

[Basic EITC Eligibility Requirements](#)

- Determining eligibility for EITC is complicated as you must make over 20 separate determinations. This toolkit presents the basic qualifiers.

Welfare Peer TA Network Webinar

[Marketing and Communication Materials](#)

- This link provides resources for providers to customize outreach materials specific to their needs.

[EITC Assistant--Find Out if You Qualify for EITC This Year](#)

- Find out if you are eligible for EITC by answering questions and providing basic income information. The EITC Assistant also estimates the amount of your EITC.

[Be Prepared to Get the EITC You Earned](#)

- Gather your important documents and make sure you have all the information you need to claim EITC. Find what information you need to prepare your return claiming EITC here.



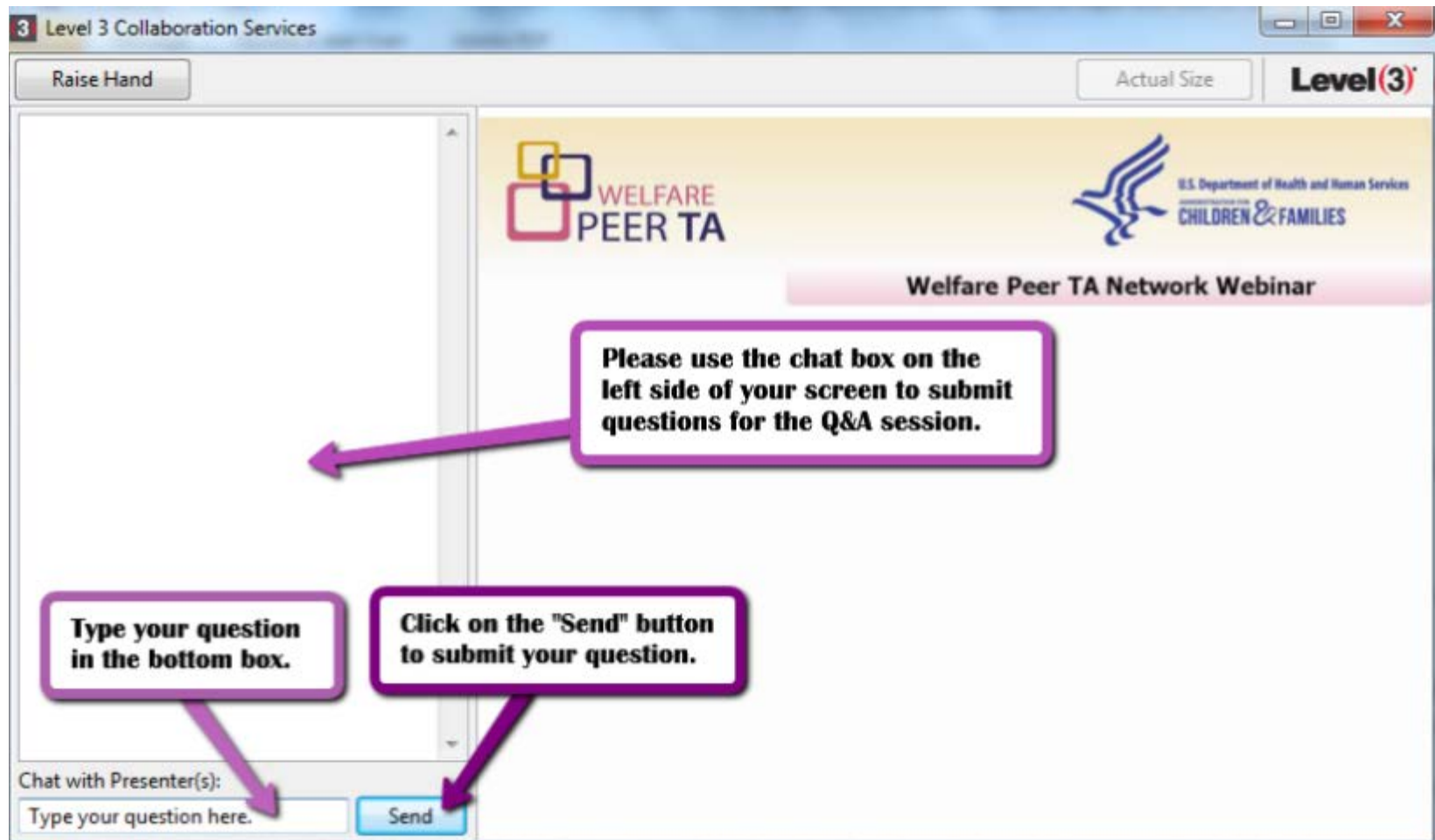
U.S. Department of Health and Human Services
ADMINISTRATION FOR
CHILDREN & FAMILIES

Welfare Peer TA Network Webinar

Question and Answer Session

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How Do I Ask a Question?



The screenshot shows a webinar interface with the following elements:

- Top Bar:** Includes a "Raise Hand" button, "Actual Size" text, and the "Level(3)" logo.
- Header:** Displays the "Welfare Peer TA" logo and the "U.S. Department of Health and Human Services ADMINISTRATION FOR CHILDREN & FAMILIES" logo.
- Title:** "Welfare Peer TA Network Webinar" is centered in a pink banner.
- Callout 1:** A purple-bordered box with the text "Please use the chat box on the left side of your screen to submit questions for the Q&A session." has a purple arrow pointing to the left side of the screen.
- Callout 2:** A purple-bordered box with the text "Type your question in the bottom box." has a purple arrow pointing to the chat input field.
- Callout 3:** A purple-bordered box with the text "Click on the 'Send' button to submit your question." has a purple arrow pointing to the "Send" button.
- Chat Area:** Located at the bottom left, it contains the text "Chat with Presenter(s):" and a text input field with the placeholder "Type your question here." followed by a blue "Send" button.



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Please remember to provide your feedback on this Webinar using the survey that will appear in a separate pop-up window when you exit the Webinar.



Welfare Peer TA Network Webinar

THANK YOU for attending the Webinar!

A transcript and audio recording will be available shortly on the Welfare Peer TA Network Web site at www.peerta.acf.hhs.gov.

We'd like to hear from you regarding future Webinar topics. Please submit your ideas by e-mail to peerta@icfi.com.

Please help us to expand our network and reach a greater number of people by directing interested colleagues from your local and State networks and agencies to <http://peerta.acf.hhs.gov>.

Please be sure to register for additional upcoming Webinars through the Welfare Peer TA Network Web site.