



**Welfare Peer Technical Assistance Network
STRENGTHENING ECONOMIC
SELF-SUFFICIENCY FOR KENTUCKY FAMILIES:
USING TAX CREDITS TO SUPPORT FAMILIES
Lexington, KY
January 30-31, 2008**



January 30, 2008 – Day One

8:00 – 8:30 AM Registration

8:30 – 9:00 AM Welcome and Introduction

Dr. Marlene Helm, Commissioner for Social Services, Lexington & Fayette Urban Government, KY

Mark Cornett, Deputy Commissioner, Department for Community Based Services, State of Kentucky

Harmony Little, Project Manager, Central Kentucky Economic Empowerment Project (CKEEP)

Carol Barnett, Acting Area II Director, IRS Stakeholder Partnerships, Education & Communication (SPEC)

Lisa Washington-Thomas, Federal Project Manager, Welfare Peer Technical Assistance Network

9:00 – 9:25 AM A Vision for Community Economic Empowerment

**The Earned Income Tax Credit (EITC) and Child Tax Credit:
Foundations for Family Financial Self-Sufficiency**

David H. Cunningham, President, Cunningham Group Consultants

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.

9:25 – 9:45 AM Partnerships in Outreach and Collaboration on the EITC

Kentucky Tax Assistance Partnerships

Mia Sylve, Acting Cincinnati Territory Manager, Internal Revenue Service (IRS)

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 Kentucky. This presentation will also include Information updates for the 2008 tax season.

9:45 – 10:00 AM Networking Break

10:00 – 10:50 AM Key Initiatives: Working Coalitions and Partnerships in Kentucky

Eric Seto, Executive Director Louisville Asset Building Coalition (LABD)
Mary O'Doherty, Development Director, Kentucky Domestic Violence Association
Keith Sanders, Executive Director, Lawrence & Augusta Hager Educational Foundation
Ljubomir Nacev, Ph.D, Chair, Northern Kentucky Asset Building Coalition (NKABC)
Jennifer Weeber, Director of Community Programs, Hazard Perry County Community Ministries

Kentucky Community Initiatives will show case innovative strategies and best practices for EITC outreach, asset growth and providing income tax assistance services.

10:50 – 11:35 AM Strategies for building and expanding the availability EITC /CTC and free income tax assistance services in Kentucky.

Moderator: Jewell Vanderhoef, Consultant, SPEC, IRS

(Panel presentation on building partnerships and local coalitions.)

Harmony Little, Project Manager, Central Kentucky Economic Empowerment Project (CKEEP)
Anna McGlone, 2-1-1 Program Coordinator, United Way of the Bluegrass
Eric Seto, Executive Director Louisville Asset Building Coalition (LABD)
John Nevitt, Assistant Director of Community Building, Metro United Way

11:35 – 12:30 PM Marketing Resources & Strategies for Community Initiatives

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

Harmony Little, Project Manager, Central Kentucky Economic Empowerment Project (CKEEP)
Jennifer Weeber, Director of Community Programs, Hazard Perry County Community Ministries

This presentation will include an overview of community and IRS EITC/CTC marketing resources and strategies to facilitate outreach and participation in local communities.

12:30 – 2:00 PM

Working in partnership to build strong families, enhance financial self-sufficiency and self-determination for low wage earners.

Moderator: Lisa Washington-Thomas, Federal Project Manager, Welfare Peer Technical Assistance Network

(Working Session)

Building effective partnerships on EITC/CTC outreach and VITA services (in both rural and urban communities).

Tiki Windley, Program Manager, EITC Carolinas

EITC Carolinas provides support to a variety of state and local EITC/VITA Coalitions that partner with business and community leaders in North and South Carolina to promote EITC/CTC outreach and make available free income tax services for low wage earners. By working with local and national financial institutions, EITC Carolinas works to provide appropriate financial services that assist the financially challenged and help the un-banked participate in asset development programs. This session will include information on strategies to build effective partnership opportunities.

Strategies for building relations with employers and business leaders on work support initiatives.

John Wilcox, Deputy Director, Corporate Voices for Working Families

The EITC/CTC are important tools for employers, employees and communities to help promote financial independence and self-sufficiency. This presentation will highlight the important role employers and business leaders can have in facilitating information and educational outreach on work support programs for low-wage earners.

2:00 – 2:15 PM

Break

2:15 – 3:15 PM

Urban and Rural Community Breakout Sessions

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

Team Leader: Michael McBride, Chief, Educational Institutions and Government Partnerships, IRS

Team Leader: Carol Quiller, Senior Tax Analyst, SPEC, IRS

Breakout Group I: Metropolitan / Urban Areas

Breakout Group II: Rural Areas / Small Towns

This working session will enable representatives from metropolitan centers and those from smaller rural communities to meet and discuss the unique challenges and opportunities confronting the respective communities, as they seek to promote EITC/ CTC outreach and expand the availability of free income tax filing services for former TANF clients and low wage earners.

3:15 – 4:30 PM

Opportunities for building a statewide partnerships to expand the availability of asset development resources for former TANF clients and other low wage earners in Kentucky.

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

The successful growth and commitment to advance income support initiatives in Kentucky creates a unique opportunity to for a dialogue between communities on shared goals, strategies and opportunities to form a statewide asset development coalition.

Amy Shir, Consultant, Institute for Social and Economic Development

An overview on the Corporation for Enterprise Development (CFED), Assets and Opportunities Scorecard. The Assets and opportunities Scorecard measures how easy or hard it is for families in Kentucky and across the nation to achieve the American Dream. This session will provide a review of these issues and programs designed to build asset growth opportunities for low wage earners.

4:30- 5:30 PM

Developing Financial Literacy Programs: A review of community resources.

Moderator: Jennifer Weeber, Director of Community Programs, Hazard Perry County Community Ministries

Jack Duff, JobSight Manager, Eastern Kentucky Concentrated Employment Program

Patrick J. Lonneman, Americorps Vista, Center for Great Neighborhoods of Covington

Joanne Bankston, Ph.D, State Specialist, Family Economics and Management, Kentucky State University - CEP

This session will include an overview of the "Money Smart Program" and other resources that are available to assist local agencies and community organizations develop financial literacy programs.

January 31, 2008 – Day Two

8:30 – 9:15 AM **Strategies for Funding Community Tax Assistance Initiatives**

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

Tiki Windley, Program Manager, EITC Carolinas

John Nevitt, Assistant Director of Community Building, Metro United Way

Building financially sustainable EITC/CTC outreach and income tax filing assistance programs for low wage earners are a critical concern. This session will highlight strategies for developing and securing funding for local programs.

9:15 – 10:00 AM **Developing Local Initiatives: Action Planning**

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

Team Leader: Michael McBride, Chief, Educational Institutions and Government Partnerships, IRS

Team Leader: Carol Quiller, Senior Tax Analyst, SPEC, IRS

Roundtable Planning Session: Participants will work in regional teams to build on Roundtable session discussions and strategies for developing, growing and enhancing local EITC/CTC outreach initiatives and community asset-building resources. (Workshop faculty will support planning teams).

10:00 – 10:40 AM **Developing A Mobile Multi-Community Outreach Project**

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

Dr. Jean Cooper, Ph.D, Executive Director, North East Oklahoma Community Action Agency (NEOCAA)

Providing asset education and income tax filing assistance services to all local communities can be a challenge. This workshop will share information on strategies for developing and managing a Mobile, Multi-Community Tax Filing Assistance Program. NEOCAA has successfully developed a network of mobile tax assistance sites in rural communities in Oklahoma. Funded with a grant from the HHS, Office of Community Services, the Oklahoma Community Action Agencies have established a statewide network of resources to promote financial self-sufficiency for former TANF clients and other low-wage earners.

10:40 – 10:50 AM **Break**

10:50 – 11:05 AM Overview of Tax Wise and effective usage of Tax Wise Preparer Fields:

Terrill Sarvis, Senior Stakeholder Relationship Tax Consultant, IRS Territory Office, Cincinnati, OH

This session will provide an overview on TAX Wise as a resource for developing information and data resources.

11:05 – 11:40 AM Opportunities and incentives for growing assets through Individual Development Accounts (IDA's) and other resources

Moderator: Jewell Vanderhoef, Consultant, SPEC, IRS

Amy Shir, Consultant, Institute for Social and Economic Development, Louisville, KY

Researchers have determined that IDA's can be effective tools to help former TANF clients and other low wage earners build assets and move toward financial self-sufficiency and security. This session will include information on both currently available IDA programs in Kentucky and opportunities to establish additional IDA programs.

11:40 – 12:20 PM Review of the Developing Community Initiative Strategies

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

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

12:20 – 12:30 PM Closing Remarks and Evaluation

Lisa Washington-Thomas, Federal Project Manager, Welfare Peer Technical Assistance Network