

**WEST VIRGINIA STAKEHOLDERS FORUM: BUILDING AN
EITC STATEWIDE INITIATIVE FOR REGIONAL
COMMUNITY COALITIONS**

Final Report of Peer TA Activity

Conducted for the West Virginia Department of Health and Human Resources
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Developed by the Welfare Peer Technical Assistance Network

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This report describes the Administration for Children and Families (ACF), Office of Family Assistance (OFA) Welfare Peer Technical Assistance Network event entitled *West Virginia Stakeholders Forum: Building an EITC Statewide Initiative for Regional Community Coalitions* that took place in Charleston, WV on November 2, 2005. The agenda from the event is provided in Appendix A. Appendix B lists the event participants, and an evaluation summary is provided in Appendix C.

The report is available for download at: <http://peerta.acf.hhs.gov/taevents/chron.htm>

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I. EVENT OVERVIEW

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The Welfare Peer Technical Assistance (TA) Network is a federally funded initiative sponsored by the Administration for Children and Families (ACF), Office of Family Assistance (OFA) within the U.S. Department of Health and Human Services. The purpose of Welfare Peer TA is to provide peer-to-peer technical assistance to public agencies and private organizations operating the Temporary Assistance to Needy Families (TANF) program. Welfare Peer TA facilitates the sharing of information between and among States and localities to establish linkages between organizations serving the needs of welfare recipients.

The event in West Virginia was titled *West Virginia Stakeholders Forum: Building an EITC Statewide Initiative for Regional Community Coalitions* and was designed as a follow-up to the Welfare Peer TA Event #115 in West Virginia. The Forum was attended by federal agency staff, State agency staff, and local representatives from the various service regions throughout the State. Local Community Action Agencies (CAAs) were represented, as was the West Virginia University Extension Service, the West Virginia Welfare Reform Coalition, and the West Virginia EITC Coalition through the North Central Community Action Agency. Overall, the Forum was designed to facilitate the next steps for West Virginia in collaborating on a Statewide plan for an effective EITC campaign for the tax year 2006.

The Forum included comprehensive information sharing related to the Earned Income Tax Credit (EITC). Highlights from the event included a speech from Mrs. Gayle Manchin, the First Lady of West Virginia, who has become an advocate and leader for the EITC initiative in West Virginia. Additionally, the leadership of West Virginia Department of Health and Human Resources (DHHR) has largely spearheaded this initiative, and participants were excited to hear that new funding resources have become available for local agencies conducting EITC campaigns. Forum participants were offered presentations on the Welfare Reform Coalition's EITC outreach campaign titled "Bounce Back," the IRS's perspective on conducting outreach in rural communities, and promising practices from the North Central Community Action EITC Coalition. The afternoon session focused participants on collaborating to develop a work plan for the campaign and identifying potential challenges surrounding a Statewide EITC campaign. The Forum added structure to the Statewide agenda by leveraging partnerships for a contact in each Region to serve as a leader for the Statewide effort.

As a result of this Forum, participants gained the following:

- Knowledge of funding opportunities from the Department of Health and Human Resources;
- A preview of the upcoming EITC marketing materials from the Welfare Reform Coalition;

- A better understanding of the IRS Rural Initiative in West Virginia;
- Examples of local community coalitions working in regional initiatives for the EITC; and
- The opportunity to collaborate with local stakeholders and formulate an action plan for a successful Statewide EITC initiative in West Virginia.

Stakeholders agreed that the Forum was a success for initiating a Statewide action plan on the EITC. The following report describes the Forum background and sessions that were designed to meet the needs articulated in West Virginia's request for technical assistance.

II. FORUM BACKGROUND

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In recent years large numbers of TANF clients have entered the workforce and moved off welfare. However, securing employment does not always equate to moving out of poverty. Many former TANF recipients earn annualized wages that still leave them below the poverty line. Many of these current and former TANF clients are eligible for the Earned Income Tax Credit (EITC).¹ Several studies, however, have revealed that, although they are eligible, many of these welfare recipients are not claiming the EITC for a variety of reasons.² The Earned Income Tax Credit (EITC) has been instrumental in closing the poverty gap for many of the nation's working poor. Enacted by Congress in 1975, the federal EITC is a refundable tax credit that increases the income of low-and moderate-income working families by providing tax reductions and cash supplements. As a federally funded anti-poverty initiative, the primary purpose of the EITC is to help employed low wage earners maintain their financial self-sufficiency by offsetting taxes, supplementing wages, and making work more attractive than welfare. Despite the success of the program, research reveals that perhaps as many as "15% - 20% of tax filers eligible for the credit fail to claim it."³ Unclaimed EITC dollars in 2003 totaled more than \$7 billion nationwide.

Widely praised for its success in supporting work and reducing poverty, the EITC has grown to be one of the most successful provisions of U.S. domestic policy. In fact, several expansions in the late 1980s and early 1990s turned the EITC into the largest federal aid program targeted to the working poor. The EITC provides some \$37 billion worth of assistance to almost 21 million low-income working families and is credited for lifting 5 million people out of poverty,⁴ including 2.7 million children of low-income workers living above the federal poverty line.⁵ Research also indicates that the EITC has had a powerful effect on increasing the proportion of single parents who are working.⁶ By providing an additional income boost through a tax refund, the EITC truly supplements wages. These and other outcomes indicate that the EITC is one of the country's most powerful income enhancements and effective work incentives

¹ Studies show that TANF recipients who find jobs typically earn \$8,000 - \$12,000 per year, well below the poverty line for a family of three. Johnson, N., Llobrera, J., & Zahradnik, B. (2003) *A hand up: How State earned income tax credits help working families escape poverty in 2003*. <http://www.cbpp.org/3-3-03sfp.htm>

² Phillips, K.R. "Who Knows about the Earned Income Tax Credit." The Urban Institute, January 2001. P.2, <http://www.urban.org>

³ Berube, A & Tiffany, T. The "State Of Low -Wage Workers: How the EITC Benefits Urban and Rural Communities in the 50 States." The Brookings Institute, February 2004. P.3. <http://www.brookings.edu/eitcseries>

⁴ The National EITC Outreach Partnership, "The Earned Income Tax Credit -A Fact Sheet" July 2004 www.centeronbudget.org/eitc-partnership/eitcfactsheet.htm

⁵ Berube, A. (June 21, 2004) "Background on EITC Campaigns". Presentation: EITC Funder's Meeting. Brookings Institute. <http://www.brookings.edu/metropolitanpolicyprogram>.

⁶ According to the National Bureau of Economic Research, the percentage of single mothers who work rose from 73 percent in 1984 to approximately 82 percent in 1996, and that EITC expansions had a stronger effect in increasing workforce participation than welfare policy changes.

for families with children. Numerous States and communities across the nation have undertaken initiatives to expand awareness of, and claims for, the EITC.

The EITC can be a powerful support to the families of West Virginia. By providing financial resources that reward work, the EITC empowers individuals and families to participate more fully in the retail and commercial economies of West Virginia. Specifically, EITC filers can use their tax refunds immediately to increase their spending power or to begin saving for longer-term financial assets such as tuition payments, increasing access to transportation through car repair or down payment on a car, or a down payment for a home.⁷ Additionally, filers accessing the Advanced Earned Income Tax Credit (AEITC) see an immediate increase in their take home pay, thereby increasing spending power and decreasing potential reliance on public assistance.⁸

The Earned Income Tax Credit can have two important effects on the economic well-being of communities. First, it encourages and rewards work by providing a significant financial incentive for earned income. Second, it increases the financial capacity of families. When coupled with thoughtful asset-building and financial literacy programs, these impacts can, over time, extend into the community through:

- Improved job stability and enhanced retail participation;
- Increased home ownership; and
- Decreased reliance on public assistance.

Job stability and increased retail participation support the health of local economies and businesses, which, in turn provides jobs and a strong tax base for local communities. Low-income earners able to access savings will have fewer instances of employment interruptions due to financial emergencies. For example, reliable transportation is extremely important for job stability and, in rural areas, workers are more likely to rely on a personal vehicle. Upkeep on an automobile is expensive, and any unexpected repairs can quickly deplete resources. The ability to accumulate personal savings provides a cushion against such financial situations.

Lastly, at least some families in West Virginia will be able to leave public assistance because of the financial benefits associated with the EITC. Investments in the EITC by public assistance agencies have significant returns on investment, with several local collaboratives

⁷ Welfare Peer Technical Assistance Network. (Winter 2005).

⁸ Welfare Peer Technical Assistance Network (Winter 2005).

exceeding \$10 returned to the community for each dollar spent on the campaign.⁹ In Tulsa, Oklahoma, an investment of \$80,000 resulted in nearly \$14 million in federal tax refunds into the community.¹⁰

To expand TANF client and community awareness and participation in federal tax credit programs such as the EITC, the State of West Virginia requested technical assistance from the Welfare Peer Technical Assistance Network, as a follow-up to the TA event that took place in January, titled “EITC Strategies for West Virginia.” The DHHR sought to bring together local community partners to develop regional action plans for a successful Statewide EITC initiative.

In response to the TA request from West Virginia, the Welfare Peer TA Network in conjunction with EITC consultant David Cunningham planned, designed, and implemented a Forum event that was held on November 2, 2005 in Charleston, WV. Approximately 30 individuals representing a wide variety of federal, State, and local agencies and organizations attended the Forum. The Forum was designed to move the Statewide EITC agenda into action by increasing dialogue between participating agencies, community organizations, and volunteer groups regarding the 2006 tax season and to focus the Statewide effort to build and expand community coalitions to make the EITC more accessible to low-income families and families leaving TANF in West Virginia.

The following report describes the Forum event that was designed to meet the needs articulated in West Virginia’s request for technical assistance.

⁹ Welfare Peer Technical Assistance Network. (2005). *Building Assets for Virginia: Using Tax Credits to Support Families*. U.S. Department of Health and Human Services.

<http://peerta.acf.hhs.gov/pdf/CharlottesvilleFinalRpt.pdf#search='Building%20Assets%20for%20Virginia'>

¹⁰ National League of Cities. *Developing a Campaign Budget and Funding Strategy*.

<http://www.nlc.org/nlctoolkit/html/part2d.html>

III. FORUM SESSIONS

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The Welfare Peer TA Forum event entitled *West Virginia Stakeholders Forum: Building an EITC Statewide Initiative for Regional Community Coalitions* took place in Charleston, West Virginia. The one-day event included workshop sessions, interactive discussions, and presentations. The following sections of this report summarize the content of the event sessions.

1. **WELCOME AND INTRODUCTIONS: THE IMPORTANCE OF THE EARNED INCOME TAX CREDIT AND THE CHILD TAX CREDIT TO WEST VIRGINIA FAMILIES**

During this introductory session, three speakers each welcomed the Forum participants and offered their initial thoughts on the purpose, goals, and anticipated outcomes of the event. Lisa Washington-Thomas, Federal Project Officer for the Welfare Peer Technical Assistance Network, opened the event by introducing Margaret Waybright, the Commissioner of the DHHR in West Virginia.

Commissioner Waybright opened by expressing her excitement for working with the EITC to bring money back to low-income families and to the economy of West Virginia. Last year, \$73 million of the EITC went unclaimed in West Virginia. This money can help families become self-sufficient. The Commissioner looks forward to working with the community stakeholders and volunteers to help low-income families. She commended the dedication and support of Mrs. Gayle Manchin, the First Lady of West Virginia, to this important initiative. Mrs. Manchin has a background in education and has spent her career serving children and families. The EITC Statewide initiative is a way that Mrs. Manchin can serve the children and families of West Virginia, as the First Lady, by returning money back into the local communities. The Commissioner welcomed Mrs. Manchin to give her perspective on the benefits of the EITC.

Mrs. Manchin began by thanking participants for their commitment to this very important project. The EITC needs to be an important voice in West Virginia because of the success it has in bringing results. Through her experiences as the First Lady of West Virginia, Mrs. Manchin has learned that partnerships and collaboration are the best ways to carry out effective programs in West Virginia. Awareness and education for the EITC are two powerful tools that can empower and change lives in West Virginia.

Mrs. Manchin commended the DHHR for their work on the EITC to bring more money into West Virginia. She expressed gratitude to Welfare Peer TA Network for helping West Virginia reduce the amount the EITC lost for tax year 2006, through the Forum. By having collaborative events, more money can be brought to families in West Virginia to build further resources and assets. The EITC reduces dependence on public assistance and strengthens the

individual, families, and the community, which translates into a more economically stable West Virginia.

West Virginia is truly an example of how people can work together. As individuals are strengthened through the EITC, the State of West Virginia can become stronger. West Virginia ranks in the top five States for the level of giving and volunteerism. Although the State may rank lower in financial assets, the State is rich in the quality of people that are residents. This spirit can help the State have a successful EITC initiative. As evidence of the power of the volunteer spirit, West Virginia was the first State to answer the needs of people who were devastated by Hurricane Katrina. By utilizing a three-pronged plan, West Virginia was able to aid evacuees in transitioning after the disaster. The plan consisted of bringing evacuees to West Virginia, addressing their immediate needs, and helping to relocate them with family or transition them into a new life in West Virginia. The EITC rewards families for work and thus, helps them help themselves. Mrs. Manchin is happy to be an advocate for this program and thanked those working hard to make West Virginia a stronger State.

Ms. Washington-Thomas concluded the welcoming session by reviewing the impact of the EITC to alleviate poverty. The EITC is the most effective federal program to bring families out of poverty. In 2002, 4.9 million people, including 2.7 million children, were lifted out of poverty as a result of the federal EITC. For tax year 2004, working families with one child were eligible for the credit if their income was below \$30,338. Since the EITC was enacted in 1975, it has served an increasing number of individuals and families. In 2003, over 19.2 million taxpayers claimed the EITC—more than one out of every seven filers—and the total amount claimed in was \$34.4 billion in 2003.¹¹ The average credit per family was \$1,784 in 2003.¹²

EITC campaigns across the country are currently connecting tax preparation and outreach activities coupled with asset-building strategies, such as Individual Development Accounts (IDA).¹³ By directing their refund into an IDA, EITC recipients can enhance their savings and asset building potential by receiving matching funds on their credit. Additionally, a recent study found that the EITC reduced the number of lower-income working households with severe housing cost burdens by 18 percent.¹⁴ It was found that many low-income families intend to use their EITC refund to build assets for the future. More than 70 percent of EITC recipients plan to

¹¹ House Committee on Ways and Means (2004). *Green Book. Publication No. WMCP 108-6*. Washington, DC: U.S. Government Printing Office.

¹² House Committee on Ways and Means (2004). *Green Book. Publication No. WMCP 108-6*. Washington, DC: U.S. Government Printing Office.

¹³ Fernandez, A. (2002). *Earn it, keep it, save it: A guide to a successful tax credit campaign in your community*. Baltimore, MD: Annie E. Casey Foundation.

¹⁴ Stegman, M., Davis, W., & Quercia, R. (2003). *Tax policy as housing policy: The EITC's potential to make housing more affordable for working families*. Washington, DC: Brookings Institution.

spend their refunds to improve their economic and social mobility, including investments toward long-term saving, schooling, transportation, and moving to a new neighborhood.¹⁵

2. WV DHHR VISION OF THE EITC AS A TOOL FOR LIFTING FAMILIES TO FINANCIAL SELF-SUFFICIENCY, REDUCING POVERTY, AND EFFECTIVELY TRANSFERRING TANF CLIENTS INTO THE WORK FORCE

Sue Ellen Buster, WV DHHR Director of the Division of Family Assistance, Bureau for Children and Families, introduced Charles Young, WV DHHR Assistant Commissioner, to speak about the impact of the EITC and CTC in building community assets.

Mr. Young began by thanking Ms. Washington-Thomas and the Welfare Peer TA Network for bringing West Virginia EITC stakeholders together for this event. He expressed gratitude to event participants for helping the Statewide effort to expand the EITC. DHHR knows the importance of helping the residents of West Virginia receive assistance. The EITC is a powerful work incentive that can have a huge impact on the quality of life for the clients of DHHR by supplementing low wages and making work more attractive.

Mr. Young gave an example of the potential impact that the EITC can have on a single parent family. A single mother working at minimum wage makes around \$11,000 annually. While DHHR can help this family with public assistance for food and energy costs, this family will still struggle. The EITC can help the family meet its needs, not only by supplementing low wages, but by making the labor force attractive. The EITC can give public assistance clients resources to make ends meet.

This meeting can help West Virginia coordinate efforts for the upcoming tax season. DHHR has made a commitment to distribute tax information through their offices with the location of the local volunteer tax sites. Many clients are discouraged from applying for the EITC because they believe that in order to claim the EITC they must use a paid tax preparer. DHHR will make resources available to help correct this misunderstanding.

Recognizing the efforts of the local communities to bring money back into West Virginia and the importance of the EITC, Mr. Young made the announcement that DHHR will provide funding for local community initiatives for EITC and VITA networks. It is the efforts of local community collaboratives and networks that work to bring money back into the State of West Virginia; and therefore, the State will provide funding to these groups. DHHR would like to

¹⁵ Smeeding, T. M., Ross Phillips, K., & O'Connor, M. (2000). *The EITC: Expectation, knowledge, use, and economic and social mobility*. National Tax Journal, 53 (4-2), 1187-1210.

jumpstart the EITC efforts in West Virginia by providing funding for these local community-based networks. Individuals can make proposals to WV DHHR until November 15 for funding. Funding toward the EITC campaign in West Virginia makes economic sense because of the return potential to bring more money back into the State.

Concluding this session, Ms. Washington-Thomas thanked the Welfare Peer TA contractors, José Rivera, Dr. Jeanette Hercik, and David Cunningham, for their efforts in coordinating this event, and the Peer TA Requesters, Pam Mills and Ms. Buster.

3. WEST VIRGINIA EITC OUTREACH MODEL FOR SUCCESS

Ms. Buster introduced the West Virginia Welfare Reform Coalition that developed a Statewide outreach and marketing campaign to increase the access to the EITC and CTC for West Virginia eligible families. Tricia Clendenen Kingery and Elizabeth Damewood shared lessons learned over the last year from the EITC initiative.

Ms. Damewood, Senior Program Manager for the Welfare Reform Coalition, began this session by reviewing the objectives of the Welfare Reform Coalition. The West Virginia Welfare Reform Coalition was formed to carry out ongoing dialogue on welfare with the policy change from AFDC to TANF in 1996. Specifically, the Welfare Reform Coalition was created “to initiate action in the areas of research, education, advocacy, and coalition building necessary to ensure that West Virginia’s citizens, communities and organizations successfully implement welfare reform.” The Coalition is a 501(c)(3) organization with partners across the State of West Virginia, including faith-based organizations, State government agencies, human service agencies, and non-profit organizations. The Coalition is built on helping people transition from welfare to work and building assets to move people out of poverty. The EITC is an effective tool for helping low-income people build assets to become self-sufficient.

The Coalition’s EITC campaign first focused on encouraging clients to claim the EITC as “Money in your pocket!” Secondly, the campaign advocated using the EITC for asset development as “It’s your money, your future!” Because client feedback suggested that people were not claiming the EITC because taxes were intimidating and overwhelming, the campaign sought to simplify the process and help clients understand taxes and the benefits of filing. From the perspective of the Coalition, this year is the most exciting. The Coalition has focused on engaging partners and local coalitions across the State. Additionally, the Coalition has better focused its marketing materials for its target audience to give them the necessary information to better understand the EITC and asset building.

Ms. Kingery joined the Welfare Reform Coalition as the EITC Outreach Coordinator in June to apply her for-profit marketing experience to the non-profit world. Ms. Kingery's role is to serve as a resource to further advance the West Virginia EITC outreach efforts. The goal of the campaign is to increase the number of EITC filers in West Virginia, which will improve the quality of life for West Virginia families. The strategic plans include:

- Developing a Statewide outreach campaign with materials customized and utilized at the local level;
- Improving access to free tax preparation;
- Focusing on areas where one-third or more eligible people did not file and where over 50 percent used paid preparers;
- Leveraging partnerships;
- Providing strategic media coverage;
- Educating and building resources; and
- Tracking and measuring results.

Media coverage has the potential to drive results for this campaign, but is, as of yet, an untapped resource. The campaign provides monthly media sample templates for local EITC campaigns, which are sent out on the first Monday of each month. On the third Friday of each month, *The State Journal* publishes a feature on the EITC. The next article will be focused on the VITA (Volunteer Income Tax Assistance) site volunteers. Additional highlights of the campaign for this year include a Statewide outreach campaign work plan, which is managed by Ms. Kingery. Additionally, the establishment of coalitions and partnerships have been key to this campaign. The campaign has developed Statewide distribution partners for the EITC marketing materials. These include community organizations, churches, and DHHR.

The Coalition has also put together a group of State stakeholders called EITC Ambassadors. These Ambassadors receive e-mails from the Welfare Reform Coalition and attend monthly meetings on the campaign. The Coalition has formulated a branding for the Statewide EITC campaign called "Bounce back." "Bounce back" was created because the EITC gives money back to the economy and helps low-income people get back on their feet. This brand is located on the posters, envelope stuffers, and brochures. These resources can be found on www.wveitc.com, and can be formatted with local information. Additionally, funding is available for communities in the form of \$1000 mini-grants for EITC and VITA sites. Because volunteers are vital to the success of an EITC campaign, the Coalition has initiated a Volunteer Recognition Program called "Retain, Recruit, Recognize!" Volunteers receive recognition based

on the amount of EITC filings that they complete and the amount of money returned to the community as a result.

The next steps of the campaign for the upcoming tax season included providing brochures on the BB&T Community Development Bus on how to build assets, distributing of materials for local campaigns starting late fall, and providing mini-grants at the end of November. The VITA site managers training took place on November 14 in Parkersburg, November 15 in Wheeling, and November 17 in Charleston. The EITC campaign website became live on November 18 at www.wveitc.com for localities to access distribution materials. The next EITC Ambassadors meeting took place on December 8 to begin planning for the Statewide EITC kick-off day on January 9. From her experience in the EITC campaign, Ms. Kingery expressed her appreciation for DHHR, the IRS, and the local communities around West Virginia. She also asked participants to fill out the WV EITC Campaign Sign-On sheet to become an EITC Ambassador for West Virginia.

4. WEST VIRGINIA EITC COMMUNITY COALITION MODEL FOR SUCCESS

Ms. Buster introduced Barbara Fleischauer and Joshua DeFelice, representatives from the North Central Community EITC Coalition to present information on strategies for developing public relations campaigns around the EITC in their region. They highlighted methods and procedures for reporting success rates from communities in the region.

Ms. Fleischauer began by reviewing her past experience and relation to the EITC. Ms. Fleischauer, a former State legislator, began as a community activist, before moving on to the State legislature of West Virginia, serving as the chair of the Juvenile Task Force. When her term ended, her interest on helping families did not. Ms. Fleischauer took in the EITC. Several conferences bolstered her inspiration to become a larger part in the EITC campaign in West Virginia, which led her to become the Chair of the North Central EITC Coalition.

Last year, the EITC Coalition got a late start on their campaign. It began from the brainstorming of the nine counties included in the North Central region of West Virginia. West Virginia University students have been a huge help to the campaign as volunteers and interns. Although many regions around West Virginia have had difficulty receiving media support, the North Central region has been successful in using the media to support its campaign. Advertisements and information have been broadcast on the television and radio, and printed in newspapers. The success of the media support is because the Coalition focused on their local media resources. For the most part, the local media is willing to support campaigns that will help the community in the long term. The partnerships have also been key to helping communicate the EITC including the Extension Service of the West Virginia University, the Family Resource

Network, the United Way, and the State Treasurer's Office. Although the campaign did get a late start and resources were low, the campaign was successful because of the effective communication and partnerships.

This coming season, the EITC Coalition is going to better target their campaign to the local counties, rather than the region as a whole. This year, information will be included with the Holiday meals distributed to low-income families.

Ms. Fleischauer reviewed tips from her EITC experience on strategies for promoting an EITC campaign on a small budget. These strategies include:

- Make it local by creating an inventory of local media partners.
- Help the media do their job by providing press releases and information.
- Get stories of real people, which is key to giving the campaign a "face."
- Repeat the message to give people better understanding.
- Think about the audience, which includes those who have not applied, those who apply but use paid tax preparers, and employers to help their workers, and VITA volunteers.
- Make the content newsworthy, including an event, holiday, tax deadline, or by using the campaign brand.
- Be enthusiastic to make people care about filing taxes.
- Use nontraditional media, such as service groups, grocery stores, senior centers, unions, skating rinks, childcare centers, Laundromats, libraries, and schools.

Mr. DeFelice continued the presentation by reviewing a tracking process model for an EITC campaign. The tracking model includes a client profile sheet to be filled out by the volunteers after a client leaves a VITA site. This resource provides VITA sites the ability to measure and evaluate progress. Mr. DeFelice offered to send the resource to participants for their use at local sites, and offered his assistance to help participants with using Microsoft Excel. The tracking sheet can also be used to show individual volunteer returns. Specifically, Mr. DeFelice was able to bring back \$70,000 worth of EITC to West Virginia by helping to file tax returns himself. The tracking sheet helped the nine counties of the North Central region document its success for filing 750,000 returns last year.

Mike Beulike, Senior Tax Specialist from the Internal Revenue Service, asked Mr. DeFelice to share his personal experience as a VITA volunteer. Mr. DeFelice attended the training, took a self-test online, learned the TaxWise software to become a volunteer. He reiterated that it was not intimidating, although many people fear taxes. However, there are opportunities for other volunteers to work at VITA sites as greeters or in other such roles without having to file tax returns.

5. OVERVIEW OF THE IRS GOAL TO DEVELOP STATEWIDE EITC INITIATIVES

This session of the Forum featured a presentation by the Stakeholder, Partnerships, Education, and Communication (SPEC) organization of the Internal Revenue Service. The presentation included information on successful community-based projects around the country that have resulted in increased filings for the EITC and CTC (Child Tax Credit) in the 2004 tax season and the IRS's goal for expanding these efforts for Statewide successes in West Virginia. Ms. Washington-Thomas introduced Sandra Trigg, the West Virginia SPEC Territory Manager from the IRS.

Ms. Trigg offered her appreciation to DHHR and the Welfare Peer TA Network for their dedication to the EITC. Since its inception in 2001, SPEC has strived to assist taxpayers by leveraging partnerships. Partnerships with local coalitions have helped the IRS gain the trust of the taxpayers around West Virginia. SPEC uses a three-pronged approach for assisting low-income taxpayers: awareness and education, tax preparation, and asset building.

This approach represents a change in ideology from the IRS to working with low-income families. Not only does the EITC give low-income families a supplement to wages, it helps to move families out of poverty to self-sufficiency. The VITA assistance and EITC can be a dramatic change for low-income families by building assets. Ms. Trigg offered thanks to the State of West Virginia, the West Virginia EITC Campaign, Huntington EITC, Community Resource, Inc., and the North Central EITC Coalition, for their commitment to helping families. Last year, 22 new VITA sites were started with an average EITC refund of \$1,284 per filing. This is only the beginning of the campaign and more can be done to make this a successful tax season as well. Ms. Trigg introduced Mike McBride, the Director of the IRS Projects and Partnerships Division for the United States.

Mr. McBride gave a presentation titled "SPEC on the 'ROAD:' FY 2006 Rural Outreach and Assistance Demonstration." The EITC and CTC lift more children out of poverty than any other federal program. Therefore, the goal of the SPEC organization is to "develop outreach, free or low cost tax return preparation, and financial literacy pilot models that provide these

essential services to the SPEC population living in rural America.” In May of 2004, Mr. McBride began working with the ROAD project, which stands for the Rural Outreach and Assistance Demonstration (ROAD). The ROAD initiative defines rural areas as “places outside of urban areas.” Urban areas are characterized as cities with a population of more than 50,000 people. Mr. McBride outlined five major pilot areas or targeted areas of poverty where the IRS ROAD initiative focused on for FY 2005. These five areas include:

- The Old Plantation Belt—down the Eastern seaboard and along the Gulf of Mexico.
- The Mid-South Delta—including the Mississippi Delta.
- Appalachia—including the rural areas in Kentucky and West Virginia.
- Indian Country—primarily the Indian reservations in the Northwest.
- Southwest—including the rural areas of the Southwestern States.

The definitions of success for the ROAD initiative are measured by the extent of change in the following factors:

- Improving quality of life for rural America by bringing the EITC and CTC to low-income people;
- Fostering self-sustaining partnerships;
- Creating sites that continue to expand in the future;
- Creating collaborations that grow through outreach;
- Increasing tax benefits through collaborations; and
- Utilizing lessons learned to formulate future rural initiatives.

Mr. McBride reviewed the elements of a successful initiative. These include local rural partnerships, civic leadership and commitment, funding, financial literacy programs, and a broad partner base. Results from the FY 2005 Rural Initiative pilots included increased EITC filings in each of the regions. In Louisiana, a Statewide workshop through Welfare Peer TA promoted the creation of local partnerships. VITA returns increased throughout Louisiana, and Louisiana is moving toward a Statewide initiative for FY 2006. In Montana, the North Central Montana Community Ventures Coalition conducted VITA sites at three reservations and was so successful that they plan to expand to a Statewide initiative in 2006. Additionally, Michigan’s 12 poorest counties all benefited from the rural initiative by a coalition formed with DHS staff, senior citizen groups, and IRS staff. The State of West Virginia was successful in the completion of the

Welfare Peer TA Workshop in January 2005 to help define Statewide strategies for the EITC campaign. Additionally, the Department of Justice Community Capacity Development Office partnered with SPEC for three “Weed and Seed” facilities for VITA and financial literacy programs. For FY 2006, the pilots will expand to three additional rural cities. The lessons learned from the initiative included:

- Build alliances with groups have pre-existing rural connections;
- Identify advantages of the EITC for organizations and politicians;
- Use the Welfare Peer TA Network as a catalyst to form community coalitions; and
- Successfully market mobile VITA sites.

The FY 2006 rural strategy will expand to rural areas of Alabama, Mississippi, Georgia, Texas, New Mexico, Tennessee, Michigan, Massachusetts, Ohio, and Utah. The Statewide initiatives that will benefit will continue to be Louisiana, Montana, West Virginia, Delaware, and Oklahoma. The rural strategy Goal for FY 2006 is to identify States to develop a Statewide comprehensive Rural Strategy, maintain and strengthen FY 2005 pilots, and convert Louisiana, West Virginia, and Montana into Statewide strategies. The strategies are as follows:

- Strategy 1: Indirect outreach via rural groups

Examples of Activities:

- Identify self-sufficient partners.
- Consult rural Americans and organizations on best actions.
- Pilot with DOJ Weed & Seed locations.
- Pilot with USDA/HUD local offices.
- Pilot with DOL One-Stop Centers.
- Pilot with a western RCAP State.
- Identify additional partner organizations for FY 06.

- Strategy 2: Partner to establish self-sufficient VITA

Examples of Activities:

- Pilot VITA/Coalition site with Empowerment Zone/Corporations.
- Louisiana, HHS and New Orleans Territory to conduct three-pronged campaign.
- AARP to collaborate on select pilots.
- Pilot VITA sites with DOJ “Weed & Seed” locations.

- Strategy 3: Engage partners who emphasize Financial Literacy Programs

Examples of Activities:

- Partner with North Central Montana Community Ventures Coalition to establish pilot outreach, tax prep, financial literacy program in Montana.
- Establish pilot VITA site specializing in IDAs with DOJ Weed & Seed and HHS.

- Strategy 4: MOU with Federal Agency

Examples of Activities:

- Develop a Memorandum of Understanding with HHS regarding community based grantees.

There will be periodic reports from each IRS Territory to discuss each pilot, identify successes, share best practices, identify needed improvements, and identify new partners. Examples of measures for success will be if there is an increase in eligible EITC claims, increase in e-filed returns, and an increase in the number of taxpayers receiving financial literacy training and opening IDAs.

6. A PRESENTATION ON THE WEST VIRGINIA EITC INITIATIVE TOOLKIT

Ms. Kingery developed an EITC Toolkit for volunteers, coalition members, and partners. The presentation provided an overview of the toolkit and how it can be utilized to improve the quality of service being provided. Ms. Kingery provided participants with copies of the official 2005-2006 Outreach Toolkit for the EITC campaign. She reviewed aspects of the toolkit that would be useful to local community coalitions. The toolkit includes templates for the EITC marketing materials that can be tailored to include local information. The toolkit provides information on achieving success through the five strategies from the Welfare Reform Coalition:

- Develop an energized and organized campaign;
- Establish regional coalitions;
- Encourage grassroots outreach;
- Retain, recruit, recognize volunteers; and
- Work with the media.

Ms. Kingery highlighted some resources in the toolkit. For EITC stakeholders to use local community coalitions and encourage grassroots outreach, the toolkit provides guidance for

outreach activities and materials for reaching out to community-based organizations, businesses and employers, government leaders, churches and schools (page 17). These suggestions can help better focus a campaign to reach the target audience within each group. The State of West Virginia has already guaranteed that all State employees will receive information on the EITC. The Welfare Reform Coalition is also working with the West Virginia Chamber of Commerce to distribute information and is working toward utilizing local government leaders. The toolkit provides local EITC community collaboratives examples and resources for leveraging the support of government partnerships page 19).

Because volunteers are key to a successful VITA site, the toolkit provides sample certificates for volunteers, which includes the number of tax returns that he/she filed (page 23). Also, because media plays an important role in outreach, the back of the toolkit includes a list of local media contacts for EITC outreach.

7. BUILDING SUPPORT FOR WEST VIRGINIA'S REGIONAL COMMUNITY COALITIONS ON THE EARNED INCOME TAX CREDIT AND THE CHILD TAX CREDIT

This session included brainstorming on strategies to support and fund EITC and CTC outreach and free tax-filing services in West Virginia to make a difference for families and communities. This facilitated dialogue focused participants on the importance of lessons learned by model programs and how to best adopt the success of the programs in their communities.

David Cunningham, an EITC consultant to the Office of Family Assistance, began this session by commending Ms. Kingery on her efforts to create a successful EITC campaign. One of the biggest challenges of the EITC is awareness. The focus of a successful EITC campaign should be client-based, so that the clients can gain a better understanding of the information to apply for the EITC. There are a lot of working families who can benefit from the EITC who are not taking advantage of it. Across the country, only 64 percent of TANF clients have actually benefited from the EITC. In West Virginia, 141,707 tax returns were filed last year claiming the EITC, which returned \$238,230,169 to West Virginia families.

Education on the EITC is one of the greatest challenges, and it must be started early to prevent the use of paid tax preparers and refund anticipation loans. Many EITC-eligible clients are not knowledgeable enough about the EITC and asset building strategies to plan for the future and informed financial decisions. The education process should begin as early as November and December. This way, the message of the EITC can be reiterated until the person is ready to file their taxes. Mr. Cunningham cited a common marketing strategy that in order to internalize

information, it must be presented seven times, and after twelve times, consumers are likely to buy the product. The EITC can be marketed under the same concept.

Successful EITC campaigns must be locally focused. Local public officials can help leverage partnerships in local communities. Public officials will be likely to aid in an EITC campaign if they become aware of the impact the EITC can have on their local communities. For example, a single person receiving the EITC receives the equivalent of a 19-cent increase per hour.

TANF and Head Start clients make ideal audiences for a targeted outreach campaign. Oklahoma has found that many Headstart families are eligible for the EITC, and the Headstart offices are often good locations for VITA sites. The ability to document the impact of the EITC is an important step for a campaign, which is what Mr. DeFelice has offered participants. The resource allows easy demonstration of the Statewide impact, which can send a strong message to State policymakers. Employers are another great resource for EITC outreach. By conducting outreach, employers can boost the income of their employees. For the employers, the EITC offers longer job retention for the employees because it helps them become self-sufficient. In another model program, Virginia utilized high school students as VITA volunteers. Mr. Cunningham concluded by reiterating that there are many points of contact that can be made for a targeted EITC campaign.

At this point in the session, Mr. Cunningham along with Dr. Hercik, Deputy Project Director for the Welfare Peer TA Network, facilitated brainstorming with local partners on focusing the EITC campaign. Participants identified the top five issues for the EITC campaign in their local communities and discussed possible solutions:

7.1 Increasing the Number of Partners and the Channels of Communication

Participants brainstormed on ways to enhance partnerships. Key leaders can help access key groups in communities. Mr. Cunningham gave an example of Waco, TX, where the mayor held a meeting for the largest employers in the city to educate them on the unclaimed EITC. At the local hospital, over 1,000 employees were likely to be eligible for EITC. Already in Waco, several of those individuals are using the EITC toward buying houses in that community. The Waco Chamber of Commerce made the EITC a priority, which in turn, stimulated significant interest in other hospitals in the community and around Texas. Participants brainstormed on key partnerships that can be leveraged for the EITC campaign in West Virginia:

- Local major business,
- Chamber of Commerce,
- Rotary Clubs,
- Workforce Development Agencies,
- Media,
- Faith-based organizations,
- United Way,
- Financial institutions,
- College/Education Institution,
- Family Resource Centers located in rural areas, and
- West Virginia University Extension Service.

The SPEC division of the IRS provided examples for networking partnerships together. If there are local channels in a bank, the bank can bring in other banks and educational institutions, and they can leverage their partnerships with other foundations. The same thing is true with the faith-based community. Competition, in this manner, can drive results for the EITC campaign. Benton Harbor, MI is another exemplary program that conducted targeted outreach to TANF clients. After the initiative, 89 percent of clients reported that they filed for the EITC.

7.2 Maintaining Good Relationships with Partners and Volunteers

The success of an EITC campaign is vital to the longevity of the organizations. A campaign coordinator needs people to serve as backup. Knowledge should be shared throughout the organization of a successful campaign and coalition.

Volunteers can be used in a variety of tasks. It is important to make sure that volunteers are doing jobs they feel the most comfortable doing. The National Tax Coalition offers specific information on the job descriptions to run a VITA site.

7.3 Recruitment, Training, and Retention of Volunteers

Because tax filing can be intimidating, other tasks can be assigned to volunteers such as intake and outreach. Ms. Fleischauer suggested using college and high school students to watch children while their parents file their tax returns. Additionally, students can play important roles

in outreach for distributing marketing materials. Many school systems are members of the National Academy Foundation, which has expressed support of the EITC. Mr. McBride is aware that the IRS has partnered with Beta Alpha Psi, an honorary organization for Financial Information students and professionals, which can be of help in college towns.

The difficulty with recruiting volunteers is a common misperception. There are many untapped resources for recruiting volunteers. For example, *Modern Maturity* magazine, through the AARP, will run a volunteer recruitment advertisement for local campaigns. The United Way can also help with volunteers because they have preexisting trust with the community. For training volunteers, the IRS's VITA site tax filing training is constantly improving through the "Link and Learn" program online. Retention of volunteers is linked with providing volunteers with recognition for their hard work through certificates and parties.

7.4 Access to VITA Sites

VITA services must be scheduled and located in the most convenient locations for the client. Times must be flexible enough to accommodate the work schedule of the client base. Mobile services are a great resource for clients without access to transportation. To address the lack of VITA services in rural areas, Louisiana set up grants to fund organizations to provide mobile tax services. Grambling University served five parishes through mobile operations, and Job1 in New Orleans was hired to run mobile tax services in rural areas around New Orleans.

7.5 Overcoming Barriers

Barriers help explain why people do not apply for the EITC. Lack of understanding and lack of trust are two main factors why people may be intimidated to file taxes. Localized campaigns can help gain trust and get the word out. The First Lady is a great champion of the cause to promote the EITC around West Virginia and to make the campaign accessible. Ms. Fleischauer suggested using a resource on the "myths and facts" about tax filing to reduce fear among clients. The IRS confirmed that there is no penalty for delinquent filings for EITC filers, which is a common misconception.

The group brainstormed from the planning session on the most important strategies to take from the Forum. These include:

- Get United Way involved,
- Network with housing agencies,
- Reach out to other areas in the State,

- Use coalitions, and
- Utilize political networks.

The brainstorming provided local stakeholders with new ideas for a successful tax-filing season in 2006.

8. EXPANDING WEST VIRGINIA STAKEHOLDER EITC ADVISORY GROUP, NEXT STEPS, AND CLOSING REMARKS

Ms. Kingery's goal is to start a coalition in all regions across the State for the EITC. She asked for names for an outreach coordinator for each region to distribute information from the Welfare Reform Coalition.

Ms. Washington-Thomas offered thanks to all faculty and participants. West Virginia has moved forward toward a strategy to help welfare recipients to gain the EITC. However, there are more people outside of TANF that need the assistance of the EITC. Ms. Buster concurred that there was a lot of good discussion, which will help the campaign build more this year. She thanked the Welfare Peer TA Network for their dedication to this important issue.

Other resources made available to participants moving forward with the EITC include:

- The Center for Budget and Policy Priorities:
<http://www.cbpp.org>
- National League of Cities:
<http://www.nlc.org/home/>
- Center for Economic Progress:
<http://www.centerforprogress.org/>
- The National Community Tax Coalition: <http://www.tax-coalition.org/>
- Corporate Voices:
<http://www.cvworkingfamilies.org/>
- Internal Revenue Service:
<http://www.irs.gov/>
- IRS Link & Learn training:
<http://www.irs.gov/app/vita/index.jsp>
- Welfare Peer Technical Assistance Network:
<http://peerta.acf.hhs.gov/>
- FDIC Money Smart curriculum:
<http://www.fdic.gov/consumers/consumer/moneysmart/>

The Welfare Peer TA Network was excited to have hosted this successful event and looks forward to future collaboration opportunities with TANF professionals in West Virginia. Others interested in further materials related to the EITC, free tax preparation services, and low-income families are encouraged to visit the Welfare Peer TA Network Web site, located at <http://peerta.acf.hhs.gov/>.

**APPENDIX A:
AGENDA**



WELFARE PEER TECHNICAL ASSISTANCE NETWORK
West Virginia Stakeholders Forum:
Building an EITC Statewide Initiative
for Regional Community Coalitions
 Charleston, WV
 November 2, 2005



<p>9:00-9:45 AM</p>	<p>Welcome and Introductions: The Importance of the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC) to West Virginia families</p> <ul style="list-style-type: none"> ■ <i>Introduction of First Lady: Margaret Waybright</i>, Commissioner West Virginia Department of Health and Human Resources (WVDHHR) ■ <i>First Lady of the State: Mrs. Gayle C. Manchin</i> ■ <i>Ms. Lisa Washington-Thomas</i>, Federal Project Officer, Administration for Children and Families, U.S. Department of Health and Human Services (DHHS) <p>Moderator: Sue Ellen Buster, Director of the Division of Family Assistance, Bureau for Children and Families, WVDHHR</p>
<p>9:45-10:15 AM</p>	<p>WVDHHR Vision of the EITC as a Tool for Uplifting Families to Financial Self-Sufficiency, Reducing Poverty and Effectively Transferring TANF Clients into the Work Force</p> <p>Representatives of WVDHHR will provide an update on their efforts to date in using the EITC and the CTC as a mechanism to support low-income families. They will share their vision on the potential impact of the EITC/CTC for low-income families and former TANF clients and the importance of building an EITC Statewide initiative to support the development of community coalitions in making EITC/CTC accessible Statewide. WVDHHR will announce new funding resources support these regional community coalitions.</p> <p>Speaker: Charles R. Young II, Assistant Commissioner, Office of Children and Family Policy, Bureau for Children and Families, WVDHHR</p> <p>Moderator: Sue Ellen Buster, Director of the Division of Family Assistance, Bureau for Children and Families, WVDHHR</p>
<p>10:15 AM -10:30 AM</p>	<p>Break</p>
<p>10:30 – 11:00 AM</p>	<p>WVA EITC Outreach Model for Success</p> <p>The West Virginia Welfare Reform Coalition (WVWRC) developed a Statewide outreach and marketing campaign to increase the access to EITC/CTC for eligible West Virginia families. Speakers will share the lessons learned over the last year from the EITC initiative.</p> <p>Speakers: Elizabeth Damewood Lovas, Senior Program Manger, WVWRC <i>Tricia Clendenen Kingery</i>, Assistant Program Manager, WVWRC</p> <p>Moderator: Sue Ellen Buster, Director of the Division of Family Assistance, Bureau for Children and Families, WVDHHR</p>

<p>11:00 – 11:30 AM</p>	<p>WVA EITC Community Coalition Model for Success</p> <p>Representatives from the North Central Community EITC Coalition will present information on strategies for developing public relations campaigns around the EITC in their region. In addition, they will highlight the methods and procedures for reporting success rates from communities in the region.</p> <p>Speakers: <i>Barbara Fleischauer and Josh DeFelice</i>, North Central Community EITC Coalition</p> <p>Moderator: <i>Sue Ellen Buster</i>, Director of the Division of Family Assistance, Bureau for Children and Families, WVDHHR</p>
<p>11:30 AM – 12:30 PM Working Lunch</p>	<p>Overview of IRS Goal to Develop Statewide EITC Initiatives</p> <p>The IRS has initiated community outreach and education programs on the EITC and CTC, through the Stakeholder, Partnerships, Education and Communication (SPEC) organization. SPEC provides critical support to community based initiatives in West Virginia. This presentation will include information on successful community based projects around the country that have resulted in increased filings for the EITC and the CTC in the 2004 tax season, and the IRS goal for expanding these efforts for Statewide successes in West Virginia.</p> <p>Speaker: <i>Mike McBride</i>, Chief, Educational Institutions and Government Partnerships, Internal Revenue Service</p> <p>Moderator: <i>Ms. Lisa Washington-Thomas</i>, Federal Project Officer, Administration for Children and Families, U.S. Department of Health and Human Services (DHHS)</p>
<p>12:30 PM – 1:00 PM</p>	<p>A Presentation on the West Virginia EITC Initiative Toolkit</p> <p>The West Virginia Welfare Reform Coalition (WVWRC) has developed a toolkit for EITC volunteers, coalition members, and partners. This presentation will provide an overview of the toolkit and how it may be utilized to improve the quality of service being provided.</p> <p>Speaker: <i>Tricia Clendenen Kingery</i>, Assistant Program Manager, WVWRC</p> <p>Moderator: <i>Pamela Mills</i>, Senior Policy Specialist, Division of Family Assistance, Office of Children and Family Policy, WVDHHR</p>
<p>1:00 PM – 3:30 PM</p> <p><i>(includes break and report back from small groups)</i></p>	<p>Building Support for West Virginia’s regional community coalitions on the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC)</p> <p>This will be a brainstorming session on the strategies to support and fund EITC and CTC outreach a free tax filing services in West Virginia to truly make a difference for West Virginia families and communities. This facilitated dialogue and will focus the participants on the importance of the lessons learned by the model programs and how to best adopt the successes of these programs in their community. At the close of the session, WVDHHR will have a more robust understanding of the gaps in services, the challenges facing the building of these community coalitions and the support they need to grow and sustain.</p> <p>Moderator: <i>Sue Ellen Buster</i>, Director of the Division of Family Assistance, Bureau for Children and Families, WVDHHR</p> <p>Facilitators: <i>David Cunningham and Jeanette Hercik</i></p>

3:30 PM – 4:00 PM	Expanding West Virginia Stakeholders EITC Advisory Group The focus of this session is to identify active participants, from all regions of the State, willing to serve as contacts for and representatives of their area. The emphasis of the group will be to coordinate activities throughout the State. Moderator: <i>David Cunningham</i> , EITC Consultant Facilitator: <i>Tricia Clendenen Kingery</i> , Assistant Program Manager, WWRC
4:00 PM – 4:15 PM	Next Steps and Closing Remarks <i>Sue Ellen Buster and Lisa Washington-Thomas</i>

**APPENDIX B:
PARTICIPANT LIST**



WELFARE PEER TECHNICAL ASSISTANCE NETWORK
West Virginia Stakeholders Forum:
Building an EITC Statewide Initiative
for Regional Community Coalitions
Charleston, WV
November 2, 2005



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**APPENDIX C:
EVALUATION SUMMARY**

**APPENDIX C:
WELFARE PEER TA NETWORK
WEST VIRGINIA STAKEHOLDERS FORUM: BUILDING AN EITC
STATEWIDE INITIATIVE FOR REGIONAL COMMUNITY COALITIONS**

EVALUATION SUMMARY

At the conclusion of the Forum, participants were asked to evaluate how well the Welfare Peer TA event met their expectations and needs. The double-sided evaluation form asked participants first to rate the extent to which they agreed with a series of five general statements about the Forum on a 5-point scale, where 1 = Strongly Disagree and 5 = Strongly Agree. Each of the five statements and associated average scores are presented in the below chart.

Statement	Average Score
The speakers had valuable information to share, and were thorough in the subject areas presented.	4.5
The speakers engaged the audience effectively and facilitated interactive discussions.	4.05
The importance and purpose of an EITC Statewide Initiative was clearly and thoroughly explained.	4.55
The presentation of models and lessons learned provided concrete examples that stimulated discussion.	4.16
The information presented will be useful in increasing the use of the EITC in West Virginia cases.	4.38
The group exercises for our region will help us develop a strategic plan for working with the Community Coalitions.	4.26

Additionally, participants were asked four open-ended questions about their reflections on the Forum and their future technical assistance needs. These questions and representative responses received are presented below:

1. What did you find most useful about attending this forum (i.e. any immediate or long-term benefits to you/your staff that you anticipate as a result of attending this forum)?

“EITC Toolkit.”

“Information about existing coalitions with the State. Best practices.”

“This forum was very informative. I now have additional knowledge to help families to achieve another area of self-sufficiency.”

“Information provided by Tricia Kingery.”

“Facilitating connections with others around the State doing the same thing.”

“Most wonderful to see the First Lady involved and excited about supporting the EITC efforts.”

“Toolkit. Mr. Cunningham’s discussion. Barb & Josh.”

“Handouts for future publicity. Toolkit and Ad Campaign.”

“Info about grants, funding. Info from WWRC regarding marketing/publicity.”

“Gives updated information and maintains coordination of the various EITC partners/coalitions.”

“Tricia Kingery. Outreach toolkit.”

“The successes of the local coalition.”

“Contacts with State. As IRS employee, found new contacts.”

“Strengthening coalitions and EITC campaigns.”

“DHHR announcement of grant funding. Everyone coming together in a cooperative and cohesive communication effort.”

2. What issues would you have liked to have spent more time on during the forum?

“Why folks don’t claim EITC.”

“I would like to have done a mock return.”

“More work with regional groups, that would have been helpful before lunch. Most providers left after lunch.”

“Nuts and bolts about mobile sites, sites that are open during non-work hours. Recruiting, training and retaining volunteers.”

“It may have been beneficial to see what the local offices are doing to support EITC as their customers are coming off the rolls.”

“Developing strategies (who will do what) that can be of use to all locations.”

“Partners, volunteers.”

“More info/presentations tying VITA to EITC.”

“Each issue was thoroughly discussed as the meeting progressed.”

“The process of certifying and recruiting tax preparers.”

“How to build a State coalition.”

“Regional coalition building (key contacts in various areas throughout the State.”

3. On which aspects of the EITC would you like to receive additional technical assistance?

“EITC. VITA software.”

“None at this time.”

“Working in coalitions.”

“Volunteer issues, equipment issues.”

“Cannot think of any aspects at this time.”

“Mobile vans for EITC and tax preparation.”

4. Please share any overall opinions or comments you have regarding the program or the that you feel might be helpful in planning future forums.

“Very helpful. Keep up the great work.”

“Topical meeting during the year so that you can get more specifics on all possibilities you could achieve to become even more successful.”

“An agenda should have been provided prior to the meeting. Many individuals were not aware that this was a full day event.”

“Late notice was a problem with attendance. Might want to have conference in 4 regions of DHHR to get people from all corners and more remote areas.”

“Not only do the customers forget but the local field staff forget as customers leave the TANF/WORKS rolls. There should be exit packets for customers just like orientation.”

“Something may come up later. Keep group coordinated once year. This was a better time than January. That is too late due to EITC filings and the weather.”

“This program should be no more than a 4 hour session.”

“Great meeting.”

“Excellent program.”

“Encourage open attendance rather than limiting or setting controls on attendance. Set a date and announce it much earlier. Set agenda in advance and allow time for prep. Thank you for allowing me to participate. Break out groups earlier in the day would be helpful in the future.”