



Welfare Peer Technical Assistance Network

Sponsored by the Administration for Children and Families

Peer Technical Assistance (TA) Short Summary

Requesting Agency:	University of Missouri- Columbia, Personal Financial Planning Department, Human Environmental Sciences, Extension Services: Missouri Taxpayer Education Initiative (MOTAX)
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TA Event Tracking #:	146
TA Requested:	The University of Missouri Extension requested the assistance of the Welfare Peer TA Network to plan and conduct a 2-day statewide Roundtable on the Earned Income Tax Credit (EITC)/Child Tax Credit (CTC) and strategies to help eligible current and former TANF clients and low-income families apply for the credits The Roundtable would include regional extension faculty, community action agency staff and partnering organizations staff statewide.
TA Goal:	The principal goals of the Roundtable were to expand EITC/CTC outreach, regional partnership and collaboration to promote the credits and income tax filing services in rural areas. Additional goals were to also establish or enhance partnerships with the Missouri Department of Social Services, social service networks, business leaders and faith-based organizations, etc. with an aim toward helping low-wage earners and former TANF clients achieve financial independence.
TA Format:	Roundtable
Sample Evaluations:	“I learned new strategies to recruit and train additional volunteers.” “By hearing from other VITA providers I learned new ideas to try in my community.” “The client perspective was great.”

Analysis:

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. 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.

The Roundtable event in Missouri was attended by Federal agency staff, representatives from the Missouri Department of Social Services, Missouri community action agencies, and local representatives from the various service regions throughout the State, including GRO-Grass Roots Organizing, Gateway EITC Community Coalition, United Way, The Family Conservancy, Salvation Army, state agencies, faith-based community, and state universities. Overall, the Roundtable was designed to share organizational outreach methods and strategies; strengthen opportunities for collaboration between service providers, state agencies, and national partners; expand employer knowledge and support of the EITC/CTC as services that will benefit their workers and increase employee job retention, increase the availability of free income tax filing services for low-wage earners; expand the availability of financial literacy services for the target community; and build knowledge and understanding on how the EITC through outreach to current and former TANF clients and low-income families can grow and expand local and State economies.

The Roundtable included comprehensive information sharing related to the EITC. Roundtable participants were offered numerous presentations detailing the purpose of, and eligibility for, the EITC, unclaimed benefit totals from FY 2004, why TANF recipients are a good target audience for an EITC initiative, and examples of EITC Initiatives from other localities. Additionally, Federal Internal Revenue Service (IRS) staff presented on the various aspects of Volunteer Income Tax Assistance (VITA) sites, the IRS rural outreach initiative, and other helpful resources available from the IRS such as TaxWise software. In addition, a representative from The Family Conservancy offered a presentation on engaging eligible taxpayers in Individual Development Account (IDA) programs, and participants were also provided with information from the Federal Deposit Insurance Corporation (FDIC) on the Money Smart curriculum and other financial literacy resources

Additionally, networking sessions also afforded participants the opportunity to leverage the Roundtable as a catalyst for a coordinated Statewide EITC effort among stakeholders across the State of Idaho.

Overall, participants, speakers, and facilitators agreed that the Roundtable was a successful event that will help build the statewide and local capacity for Missouri to organize local initiatives, access resources, and develop collaborative partnerships related to the EITC to support working families.

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