

November 8, 2011



*Citi Education Series
on Family Economic Security*



Tax Credits Outreach: Tips and Tools for Service Providers and Advocates

John Wancheck, Center on Budget and Policy Priorities
Amy Matsui, National Women's Law Center
Melanie Ross Levin, National Women's Law Center

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Tax credits can help put money back in families' pockets.

- The federal **Earned Income Tax Credit** can be worth up to **\$5,751** in 2011.
- The federal **Child Tax Credit** can be worth up to **\$1,000** per child – and for 2011, is refundable for very low-income families.
- The federal **Child and Dependent Care Tax Credit** can be worth up to **\$2,100**.

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For 2011 (and 2012), refunds will not affect low-income tax filers' eligibility for any federally-funded program.

- Refunds received by low-income filers will not count as income for eligibility determinations for federally funded public benefits programs (like TANF, SNAP, SSI).
- Any savings contributions from refunds will also be excluded from determining benefit eligibility for 12 months following the receipt of the refund.



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And states offer similar tax assistance to families:

In 2011:

- Twenty-four states offer EITCs;
- Twenty-eight states offer child care credits; and
- Three states offer child tax credits.



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But families need to file their taxes and claim these credits to get the benefits!

- An estimated 20-25% of eligible individuals and families fail to claim the EITC each year, meaning that billions of dollars in tax credits go unclaimed.
- Make sure the families in your area aren't among them!

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Tax credits outreach is another way to help working families make ends meet.



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**And you can probably build on
the outreach you're already
doing!**

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You can take four easy steps to help inform families about tax credits.

- Get the facts.
- Partner up to expand your reach.
- Spread the word to families with children.
- Work with the media.

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Get the facts – about tax credits.

- Free materials on tax credits are available.
 - Visit www.nwlc.org/loweryourtaxes to download free state-specific fliers and other materials.
 - Visit www.eitcoutreach.org for information and materials on the federal EITC and the Child Tax Credit.
 - The IRS has a special webpage focusing on the EITC. Visit www.eitc.irs.gov/central/abouteitc/.



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Get the facts – about free tax preparation help.

- The IRS-sponsored VITA Program offers free tax help to low- to moderate-income (generally, \$48,000 and below) people who cannot prepare their own tax returns.
- The IRS also coordinates with AARP to offer tax help to people of low-to-middle income, with special attention to those age 60 and older, through a program called Tax-Aide.

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Volunteer vs. Paid Tax Prep

- Volunteer tax preparers are trained by the IRS and have IRS support.
- If you have questions or follow-up, organizations that do free tax prep don't pack up after April.
- Free tax preparers don't charge exorbitant Refund Anticipation Loans (RALs).
- Sometimes free tax preparers can connect families with other services or resources.

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To get information about free tax preparation services. . .

- Call the IRS' free hotline at **1-800-906-9887** to locate a VITA site near you.
- Call **1-888-227-7669** or visit <http://www.aarp.org/money/taxaide/> to locate an AARP-sponsored Tax-Aide site near you.

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Partner up to expand your reach.

- Work with EITC coalitions.
- Work with other advocacy or service organizations in your community.
- Work with local businesses.
- Work with state and local government agencies and officials.

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Tax Credit Coalitions

Over 300 local coalitions nationwide:

- Conduct tax credit outreach campaigns
- Organize free tax assistance services
- Link to financial services and asset-building programs
- Help assess eligibility for other public benefits

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Coalitions are “Grassroots”

- Organized by local community groups serving lower-income families.
- They are not government programs.
- Often include the mayor, or other public official, and local business leaders.

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What Coalitions Do

- Choose strategy, themes and materials for tax season outreach campaigns
- Find partners to host Volunteer Income Tax Assistance (VITA) sites
- Recruit VITA volunteers as preparers
- Organize training for volunteers
- Get campaign information out to workers!

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The Value of More Partners

- Outreach coalitions divide campaign tasks; takes advantage of partners' special capabilities and avoids duplication
- Some partners are experienced reaching some parts of the community:
Ex. – ethnic communities and businesses, family day care providers, people with disabilities

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Coalitions Partner with the IRS

- IRS staff don't run VITA sites
- IRS staff help sites get started, ensure quality of preparation
- VITA sites use IRS training materials and free tax software
- IRS provides trouble-shooting help during the filing season

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Connecting with a Coalition

- There may be one in your hometown!
- Directory of local partnerships, by state:
The National EITC Partnership website:
www.cbpp.org/eitc-partnership
 1. Spreadsheet with coalition members,
chairperson to contact
 2. Goals and activities of coalition

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Your Town Isn't Listed?

More at National EITC Partner's website:

- List of IRS Territory Managers who work with organizations in the state
- Contact people for national organizations
 - Your United Way or Goodwill may be active
- Descriptions of national organization involvement in tax credit outreach

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More Connections for You

- The Center on Budget and Policy Priorities has a contact list of 7,000 organizations who request the Center's annual Tax Credit Community Outreach Kit —
Call CBPP: **202-408-1080**
- National Community Tax Coalition website:
www.tax-coalition.org/programs.cfm.

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Spread the word to families with children.

- Give materials to your members, your partner organizations, and government agencies or businesses.
- Use your or your partners' newsletters.
- Put information on tax credits on your website and share the link!
- Hold parent meetings.
- Be prepared to give information out over the phone.

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Give materials to your members, your partner organizations, and government agencies or businesses.

- Email around electronic copies of outreach materials to your networks.
- Bring sample outreach materials to meetings and conferences.
- If you can, make copies for your partners!

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Use your or your partners' newsletters.

- Towards the end of the year, put a short article about tax credits in your newsletter – many families file their taxes in January!
- Put a reminder in your spring newsletter for families who are late filers.

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Sample newsletter article. . . .

Help Families Claim Valuable Tax Credits - Worth More Than Ever This Year!

You can make a difference by educating low- and moderate-income families about federal and state tax credits that can help put thousands of dollars in their pockets! When they file their taxes for 2011 in early 2012, working families may be eligible to claim valuable federal tax credits, such as:

- **Earned Income Tax Credit**, which helps provide a wage supplement for low and moderate-income families (those earning less than \$49,078 annually). This credit is worth up to **\$5,751**, and is refundable.
- **Child Tax Credit**, designed to help families offset some of the costs of raising children. This credit is worth up to **\$1,000** per child. Families who owe little or no income tax can receive some or all of this credit as a refund if they earned at least \$3,000 in 2011.
- **Child and Dependent Care Tax Credit**, designed to offset some of the child or dependent care costs that families incur in order to work. This credit is worth up to **\$2,100**, though the amount that can be claimed is limited by a family's actual federal income tax liability.

In addition, many states offer their own child and dependent care tax credits and earned income tax credits, and a few offer child tax credits as well.

But families have to know about the credits in order to claim them on their state and federal tax returns, and you can help. Each tax filing season, the National Women's Law Center, working with advocates and service providers across the country, conducts a national tax credits outreach campaign. Participating is easy!

- **To download free outreach materials**, many of which are available in Spanish and other languages, visit the NWLC Tax Credits Outreach Campaign webpage at www.nwlc.org/LowerYourTaxes.
- **To find out more about the location, dates, and hours of free tax preparation sites in your area**, call the Internal Revenue Service toll-free at (800) 906-9887.
- **For more information**, or to join the campaign as a community partner, contact Melanie Ross Levin at mrosslevin@nwlc.org.

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Put information on tax credits on your website and share the link!

- Put tax credit information on your website.
 - Link to www.nwlc.org/loweryourtaxes.
 - Give information about local free tax preparation services.

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Hold parent meetings.

- Organize a meeting in early January to tell families about tax credits.
- Ask if you can make a presentation at parent meetings or trainings organized by others in your community.



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Be prepared to give information out over the phone.

- Have your receptionist ask families who call if they want information about tax credits or free tax preparation services.
- If you have a pre-recorded message, mention tax credits resources.
- If your community has a 211 service, ask if those operators can give out tax info.

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Work with the media.

- Talk to newspaper and television reporters, and with radio news services.
- Organize a press conference with state and local government officials.
- Write letters to the editor.
- Start a Public Service Announcement campaign.



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For more information about working with the media....

Visit www.nwlc.org/loweryourtaxes to
download:

- A media tipsheet
- Sample PSAs

And contact NWLC if you would like help
drafting a press release!

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Become an NWLC Community Partner

As a community partner, you will receive:

- Customized resources that make it easy to spread the word about tax credits to families in your community;
- Technical assistance on issues relating to tax credits and outreach activities; and
- Acknowledgement on our website.

Sign up today at

<http://action.nwlc.org/communitypartner>



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**Now you have some tools to
give families information about
tax credits that can help them
make ends meet.**



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For more tips and tools about tax credits outreach techniques:

- Download NWLC's Toolkit for Advocates, state flyers and other materials at <http://www.nwlc.org/loweryourtaxes>.
- Download CBPP's Earned Income Tax Credit outreach kit at <http://eitcoutreach.org>.