

For four years, the Human Resources department at St. Joseph's Hospital and Medical Center (SJHMC) in Phoenix, Arizona has coordinated free tax preparation services for its employees. In 2011, SJHMC expanded its services to Mercy Gilbert and Chandler Regional Medical Centers. The three sites prepared federal and state tax returns for hospital employees, volunteers and contract staff with income less than \$56,000 for four weeks beginning in February. Employees were required to complete a reservation form to schedule appointments, which were available Monday to Friday, 7:00 AM to 4:00 PM. SJHMC promotes the free tax preparation services through the hospital's monthly benefits newsletter, email blasts, and manager/director meetings. For the 2011 filing season, eight VITA volunteers filed 191 tax returns (a 33 percent increase from the previous year), generating \$349,642 in federal refunds and \$49,937 in state refunds.

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Businesses and Employers

Since the EIC and the CTC are tax benefits for people who work, employers are logical and important partners in any campaign. Partnering with local businesses that cater to low- and moderate-income consumers can reach customers, as well as employees. Government agencies and nonprofit groups are employers too. Their workers often earn modest wages and could qualify for the credits.

STRATEGIES

- Interest local businesses in conducting tax credit outreach by stressing that they have a stake in boosting EIC and CTC participation: Promoting the credits helps stabilize the workforce. When employees have the money they need to get to work, pay for child care and address their families' day-to-day needs, they are more likely to keep their jobs. Tax credits mean more money in the pockets of community residents. Customers are better able to pay their bills. Community leaders can think of the credits as an economic development tool.
- Enlist a business organization to deliver the message about the importance of the tax credits. Gaining the support of the Chamber of Commerce, merchants' associations, trade groups or other business organizations will give your campaign credibility with employers and will provide a link to large networks of businesses.
- Persuade local businesses to use tax credit promotional materials. Stores can display posters and flyers. Family restaurants can print tax credit messages on tray liners or placemats. Department stores can play announcements on in-store public address systems. Utility companies can include tax credit information with their monthly bills.
- Show employers effective ways to inform employees about the tax credits. Incorporate tax credit information with employee paychecks, December through March. Display posters and flyers where employees check in at the beginning

and end of each day, and in the employee lounge or lunchroom. Publish an article about the tax credits in employee newsletters. One large government employer ran an EIC message as a computer screensaver. Another placed an EIC reminder on the telephone recording that plays when a caller is “on hold.” Another business made EIC information available through its employee “resource line,” an internal hotline employees can call for information about company benefits and other services.

- Train managers to deliver information about the EIC and the CTC to employees they supervise and to new hires. Include tax credit information in employee manuals.
- Direct employees to free tax filing sites. Employers with many low-wage employees can provide a list of nearby VITA sites or they can arrange to have VITA volunteers visit the worksite to help employees file their tax returns.
- Explore strategies for reaching self-employed entrepreneurs. The Self-Employment Tax Initiative (SETI) is a small business development strategy that helps lower-income, self-employed individuals formalize and grow their businesses, create jobs and access tax-based asset building opportunities. A project of the Corporation for Enterprise Development (CFED), SETI has provided support to over 40 organizations since 2006 to help them develop programs that provide skilled free or low-cost tax preparation assistance, business development and asset-building services to lower-income self-employed taxpayers. SETI also conducts research and field-building among local partners and promotes sound tax policy to better enable self-employed entrepreneurs to meet their tax obligations and receive the tax benefits they have earned. SETI offers an online Resource Bank (www.cfed.org/programs/seti/resource_bank/) containing strategies, tools, templates, sample materials and other resources to help organizations interested in providing self-employment tax assistance to low-income entrepreneurs with outreach, marketing, volunteer recruitment, organizational tools for clients and more. *For more information, contact SETI's Kim Pate at kpate@cfed.org or visit www.cfed.org/programs/seti.*

AccountAbility

Minnesota (AAM), a community-based nonprofit organization in St. Paul, Minnesota, provides free tax assistance and related financial services to low-income taxpayers and delivers support statewide to enable other agencies to provide such services. In 2011, AAM assisted 724 self-employed customers with free tax assistance by recruiting and training more than 25 volunteers to prepare basic self-employment returns. AAM designed outreach materials specifically for the self-employed and created organizational tools to help them better prepare their financial information for tax filing, in both Spanish and English. AAM initiated an innovative project helping rural sites prepare more complicated self-employment returns through video conferencing. Using laptop computers with video cameras, AAM provides rural tax site partners the ability to start the tax preparation screening process with a self-employed customer. The partner could then remotely access AAM's self-employed tax preparation volunteers in St. Paul to complete the return and ask questions of the taxpayer. AAM collaborated with the Self-Employment Tax Initiative in developing this capacity.



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www.eitoutreach.org

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