



An Effective Outreach Campaign: A Spectrum of Involvement Where All Partners Can Find A Place

Over the past two decades, a great deal has been learned from outreach efforts conducted by organizations across the country. Their experience has helped to identify **six key elements** of a successful Tax Credit Outreach Campaign. It may be helpful to think of these elements as a “spectrum of involvement” or a range of activities. The spectrum starts with simple ways of conveying the message about the tax credits and moves toward more intensive efforts that weave outreach into the ongoing work of organizations and institutions that interact with eligible workers.

The six key elements include:

- 1** Distributing information about the tax credits and free tax filing help
- 2** Enlisting partners to reach out through their own networks and contribute to the overall campaign
- 3** Conducting outreach events and creating opportunities for workers to get help filing their tax returns
- 4** Increasing the number of VITA sites and improving the services they offer
- 5** Keeping the public eye on the campaign
- 6** Working to sustain outreach efforts into the future

Campaigns often start with the most basic activity: distributing information. They evolve over time to include broad community involvement that brings together the resources to sustain outreach on an ongoing basis. Throughout the life of a campaign, any given organization can find a way to become involved based on how closely tax credit outreach fits with its specific mission or depending on the special skills or resources it may be able to contribute. The important thing is that all potential partners see that they have a role to play in making the campaign as effective as it can be.

Read On to Learn More About the Six Key Elements of A Successful Tax Credit Outreach Campaign

1. Distribute information about the tax credits and free tax filing help. This kit contains much of the materials you will need for your campaign. There are full-color posters, as well as easy-to-reproduce flyers and envelope stuffers in English and Spanish. There also are materials that explain the value of free tax filing assistance and let tax filers know what documents to bring to a VITA site. You may wish to customize the posters and flyers by adding the contact information for the nearest VITA site or a local toll-free hotline number where more information about the credits and free tax filing opportunities are available. These items, as well as flyers translated into 19 additional languages and other useful materials, also are available on the Tax Credit Outreach Campaign website: www.eitcoutreach.org.

Getting this information into the hands of eligible workers is fundamental to a successful Outreach Campaign. If you are just beginning a campaign, or if tax filing season is fast approaching and there isn't much time to organize more intensive efforts, distributing these basic materials will still have an

important impact. Include information about the tax credits and VITA in school or congregation newsletters, in employee pay envelopes and consumer mailings, such as utility bills and shopper's circulars that are mailed to community residents. Arrange to display posters in employee break rooms, in store windows, on public transportation, in libraries, in offices where people apply for public benefits and other places where eligible workers are likely to see them.

2. Enlist partners to reach out through their own networks and contribute to the overall campaign.

Partners are the backbone of a vibrant and successful outreach campaign. They bring valuable contacts, skills and resources (staff, time, funding) to the table. Partners also can help enrich the campaign by recruiting VITA volunteers or by underwriting printing, publicity or other costs.

Outreach partners may include:

- Community organizations
- Nonprofit human services organizations
- Civic and service organizations
- Schools
- State and local governments
- Community development corporations
- Employers and local businesses
- Goodwill Industries
- Child care and foster care agencies
- Public benefit programs
- Labor unions
- Utility companies
- Banks
- United Way
- Legal assistance programs
- Faith-based groups
- Food banks and shelters

Organize a meeting to find out what potential partners may be doing already to promote the EIC and the CTC. If outreach work is not already underway, bring organizations together to establish an outreach coalition. Train potential partners about the EIC and CTC and why it is important for them to inform their employees, customers, clients, members



Each of the 16 member groups in the Eastern Maine CASH

Coalition (EMCC) plays a role in efforts to promote the EIC, CTC, and free tax preparation services in four counties. AARP provides training for all the volunteer tax preparers and hosts 15 of the Coalition's free tax filing sites. The Penobscot Credit Union, Washington/Hancock Community Action, and the Penquis Community Action Program also sponsor free tax preparation. United Way of Eastern Maine advertises the sites and provides administrative support for the Coalition. Women, Work and Community leads EMCC's asset development activities. The Department of Housing and Urban Development facilitates relationships with Native American tribes to make sure they know about available tax credits and free tax filing services.

Casey Family Services leads CASH Maine, a statewide coalition that includes EMCC and seven other regional coalitions. In 2010, Key Bank, a statewide Coalition member, sponsored a series of more than 100 television public service announcements that ran on two ABC affiliates throughout Maine. The announcements highlighted topics such as free tax preparation, the EIC, the CTC, and how to build savings; they also referred viewers to dial "2-1-1" to find the closest free tax site. In 2010, EMCC's outreach efforts enabled the Coalition's 19 tax sites to complete 3,201 tax returns, providing \$943,004 in EIC refunds and \$394,328 in CTC refunds.

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and others. A training session for potential partners can be the start of building a far-reaching Outreach Campaign. For example, conducting a training session for the Chamber of Commerce could lead to the involvement of businesses throughout the community. The social action committee at a local church may include members who also are business leaders, school officials or hold other prominent positions. Thus, engaging the congregation in the campaign could be a link to other outreach opportunities. A successful Outreach Campaign will offer partners a wide range of ways to contribute. Encourage partner organizations to incorporate outreach activities into their own work, and challenge them to work together to build the capacity of the campaign.

3. Conduct outreach events and create opportunities for workers to file tax returns for free.

Take advantage of places where eligible people may gather — such as tenant meetings in housing developments, PTA meetings, community sporting events, civic or cultural events, community health or job fairs or other activities — to distribute information about the tax credits and VITA. Set up your own special event that draws attention to the Tax Credit Outreach Campaign. Organize free tax filing opportunities at community events, publicizing them in advance so tax filers know what documents to bring with them. Your IRS Territory Manager can help identify trained volunteers to help prepare tax returns at an event. Retired or volunteer accountants, the Society of Certified Public Accountants, or students also may be able to assist.

4. Increase the number of VITA sites and improve the services they offer.

Few communities have enough VITA sites or sites that are in locations that are most convenient for eligible workers. Community action agencies, schools, recreation centers, libraries, housing developments, public assistance offices or other places that have good



To expand the use of free tax preparation services and enhance financial education outreach efforts, Purdue Cooperative Extension Services (PCES) joined the Allen County Financial Stability Partnership in Fort Wayne, Indiana. The Partnership coordinated two events to promote the tax credits and free tax filing assistance services.

One event was in mid-October 2009, during Money Smart Week — a national initiative of the Federal Reserve Bank of Chicago to help consumers better manage their personal finances. PCES coordinated a kick-off Money Fair with vendor booths and educational workshops. Partnership members presented information about the tax credits, free tax filing assistance (including the availability of interpreter services in Spanish, Russian, French, and Arabic), foreclosure prevention, financial resources, and budgeting tips.

For the second event, held on National EITC Awareness Day in January 2010, the Partnership prepared tax returns in U.S. Senator Dick Lugar's office.

During the 2010 tax season, the Partnership filed a total 1,359 tax returns providing \$764,888 in EIC refunds.

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connections with eligible workers are ideal locations for VITA sites. Work with your IRS Territory Manager to establish new VITA sites. Help improve services at existing VITA sites by enlisting local

Everything is relational. While tax season will come to an end, partnerships should not. Continual communication with all partners is imperative. As a “Professional Friend Maker,” I call our partners once a month or visit them to strengthen our relationship so that everyone is ready once tax season rolls around. If you don’t nurture partnerships and establish a personal connection in addition to the business relationship, they will not trust you enough to take it to the next level.

Kelly Hugunine, Community Services Agency Development Corporation, Reno, Nevada

businesses to donate computers to enable the site to offer electronic filing, which gets filers their refunds more quickly. Recruit bilingual volunteers or provide interpreters in communities where tax filers speak languages other than English. Work to ensure that VITA sites are accessible to people with disabilities. Enlist volunteers to provide child care while parents are getting their taxes filed.

5. Keep the public eye on the campaign.

Media coverage can keep public attention on the progress of your Tax Credit Outreach Campaign and also can attract new partners and volunteers. Nurture a good relationship with the media by demonstrating that you are a responsive and reliable source for information. Always keep the main message front and center: The tax credit story is about hard-working people raising families and trying to achieve financial security.

Send news about the tax credits and your campaign activities to newspapers and radio and television stations. Include reporters and columnists who cover



Northeast South Dakota
Community Action Program
(NESDCAP) in Sisseton, South Dakota

uses several strategies to promote free tax filing services in its 17-county service area. In 2010, NESDCAP hosted a VITA site between January 15 and October 15 and conducted 12 mobile tax preparation clinics in eight communities. To promote the tax credits and free tax preparation, in January NESDCAP published weekly news releases on several topics, including EIC eligibility, the role of a VITA program, and important documents needed to file tax returns at VITA sites. NESDCAP also produced public service announcements that aired on two radio stations for two weeks during February and March and promoted its free tax preparation services on three local cable stations throughout the tax season. In addition, NESDCAP distributed nearly 3,000 flyers, brochures, envelope stuffers, newsletter articles, posters, and postcards. These combined efforts led NESDCAP's VITA site to complete 300 tax returns, providing over \$550,000 in total refunds to taxpayers in 2010.

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human services, personal finance, and business issues, as well as those who write feature stories. Meet with the editorial board. Send information to hosts and producers of community affairs programs and local talk shows. Remember to include non-English language media. Weekly or small community newspapers may be willing to print your flyer as an

[An important aspect of] sustainability is predicated on the idea of going beyond merely helping people get the EIC. While helping working families access the EIC one year is terrific, forward-thinking organizations realize that a multi-year approach combining EIC outreach and asset building is the best bet for helping those families build financial stability.

Jason Sabo, United Way of Texas, Austin, Texas

advertisement. Shoppers' guides and circulars that advertise in-store sales can also run tax credit messages. Radio and TV stations may agree to air public service announcements (PSAs). Transit authorities can donate ad space for bus shelters, buses and trains. In some movie theaters, slides with local ads are projected on the screen before the film. Ask the manager if a tax credit ad can be included.

Think about partners with the resources and connections to get coverage for the campaign. The support of elected officials and other high-profile community leaders can draw attention to the campaign. Public agencies, community colleges, or utility companies may have regular space in the local paper or a routine timeslot on local radio or cable TV. Visit the "Outreach Tools" section of www.eitcoutreach.org, for more ideas on working with the media.

6. Work to sustain outreach efforts in the future. Work on making outreach activities an integral part of how organizations in the community operate. For example, businesses may start by posting tax credit flyers on the lunchroom bulletin board, but they can institutionalize outreach by including tax credit

information in the orientation for new employees. A community college may conduct training for students who wish to volunteer at local VITA sites. The college can institutionalize tax credit outreach by sponsoring its own VITA site and initiating a system for informing its employees and students about the credits and where to get free tax filing help on campus. (This could be a campus-wide email or notices with paychecks or end-of-term grades, for instance.) Identify funding and other resources that can add stability to a budding campaign and help it grow.

Fundraising

Tax Credit Outreach Campaigns can operate on the in-kind support of its partners, but as the campaign broadens and intensifies, specific funding may be necessary. Community foundations, in particular, may have a special interest in the economic health of their community. Civic groups, local businesses or the United Way may help provide support for the campaign. Government funding, such as the Community Development Block Grant or special state outreach grants, may be available.

Campaigns will have to make the case for why tax credit outreach is needed. The Brookings Institution provides data on EIC claims by zip code at www.brookings.edu/metro/EITC/EITC-Homepage.aspx. This information can help you document the need for outreach and help pinpoint where outreach efforts should be targeted. For other ideas on making the case for outreach visit the "Outreach Tools" section of the Tax Credit Outreach Campaign website at www.eitcoutreach.org