



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.cbpp.org/eic2010.

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



At the University of Wisconsin Extension in Adams County, the Nutritional Education Program (NEP) educators use their in-depth knowledge of the rural community to make tax credit outreach efforts as effective as possible. NEP educators analyzed where families that might benefit from the tax credits can be reached within the community and created partnerships to carry the message. To reach workers who do not speak English, NEP worked with a teacher at a local public school who was already acting as a liaison to these families. NEP called local markets and asked them to distribute flyers with both healthy recipes and EIC information to reach budget-conscious shoppers. Enlisting the help of the Milwaukee IRS, NEP displayed posters in five community gathering spaces and distributed 600 flyers, 190 brochures, and 250 tax-themed newsletters.

Contact: Theresa Wimann, University of Wisconsin, (608) 339-4237 or Theresa.wimann@ces.ewex.edu.

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

The key to distributing information effectively is three-fold: early, often and as widely as possible... Whether you're using email or [placing] flyers on cars, devise a plan to get tax credit information out to the community on an ongoing basis. Even if it's once a month or every other week, the message needs to be repeated.

Latisha Latiker, Children's Defense Fund, Southern Regional Office, Jackson, MS

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 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 the 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 the event. Retired or volunteer accountants, the Society of Certified Public Accountants, or students also may be able to assist.



The New York State Office of Temporary and Disability Assistance (NYSOTDA) is a founding member of the CASH Coalition of the Greater Capital Region which has grown to include over 50 partners in six years. NYSOTDA participated in Super Saturday events in three communities during 2009 to promote work supports such as food stamps, health insurance and energy assistance, in addition to tax credits. The Super Saturday events also linked participants to banking and financial education opportunities. During the first six months of 2009, NYSOTDA representatives made 53 formal group presentations and staffed 14 conferences, where they introduced tax credit and work support information to local businesses, community-based organizations, and social service agencies. NYSOTDA also distributed written materials, and managed a comprehensive website, estimating that it shared information with 1,500 employers. In 2009, NYSOTDA coordinated 23 VITA sites in local departments of social services, filing a total of 7,678 tax returns with the help of more than 200 volunteer tax preparers.

Contact: *Mark Schaffer, NYSOTDA, (518) 474-9346 or Mark.Schaffer@otda.state.ny.us.*

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 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 businesses to donate computers to enable the site to offer electronic filing, which gets filers their



To increase the accessibility of free tax preparation, PathWays PA provides services to four counties in Pennsylvania through both mobile and fixed VITA locations. Armed with portable laptops and printers, the 31-year-old nonprofit organization overcomes barriers to reaching low-income workers, immigrant workers, and workers with disabilities by traveling directly to where those families live and work. In 2009, PathWays PA arranged a total of 70 mobile tax preparation clinics, and up to five per day during the height of the tax season. Clinics are located primarily at child care centers, welfare-to-work offices, libraries, and health care facilities and are promoted using flyers, print media and television spots. In addition to free tax filing, PathWays PA screens individuals for eligibility for other work supports and provides financial education at many of the mobile clinics. In 2009, PathWays PA filed approximately 1,000 returns, of which 604 were prepared at mobile clinics.

Contact: Lyn Kugel, PathWays PA, (610) 543-5022, or lkugel@pathwayspa.org.

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

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 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 advertisement. Shoppers' guides and circulars that advertise in-store sales are good places to run tax credit messages. Radio and TV stations may agree to air public service announcements (PSAs). Transit authorities could be persuaded to donate the space for ads on 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.

[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

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 Tax Credit Outreach Campaign website, www.cbpp.org/eic2010, 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 Tax Credit Outreach Campaign website at www.cbpp.org/eic2010.