



Outreach Strategies:

You don't have to be a tax expert to help working families learn about and claim the Earned Income Credit and the Child Tax Credit!

Community organizations, social services providers, government agencies, faith-based groups, schools, labor unions, employers, advocacy groups and others all can play a vital role in bringing these tax benefits within reach of working families and individuals. Whether your goal is to incorporate tax credit outreach into your routine activities or to launch a full-fledged community-wide campaign, you will find what you need here. As you develop and enrich your Tax Credit Outreach Campaign, you may be looking for ideas that will help you engage new partners in outreach activities, or for strategies that will help you conduct effective outreach activities in particular communities. The material in this booklet will help you with either approach.

Each section of this guide focuses on a potential outreach partner or a community in which there is likely to be a need for outreach. For each of these, you will find suggested outreach strategies, as well as examples of activities being implemented by organizations like yours across the country. In addition, you will find the answers to commonly asked questions about the tax credits and notes about much more information available on our website, www.eitcoutreach.org.

As you consider new ideas for outreach, spend some time exploring the companion booklet in this kit, *Your Tax Credit Outreach Campaign: What You Need to Know*. It describes "Six Key Elements of a Successful Outreach Campaign" and can help you in planning your activities and building a campaign that continues past the tax filing season and into the future.

Find Tax Credit Outreach Coalitions

The outreach examples in this booklet represent just some of the great tax credit outreach ideas that are working in communities across the country. You can find more examples in the searchable Outreach Database on our website, www.eitcoutreach.org.

On behalf of the National EITC Outreach Partnership, we also provide an extensive state-by-state listing of hundreds of local tax credit coalitions providing free tax filing assistance at: www.centeronbudget.org/eitc-partnership/eitc-partnership.htm

This listing is assembled annually by the IRS Stakeholders, Partners, Education and Communication (SPEC) office from information provided by local IRS staff working directly with tax credit outreach and Volunteer Income Tax Assistance (VITA) programs. Each state link provides a separate tab for each local outreach coalition, with a listing of participating organizations, major activities and future plans. Contact information for the coalition chairperson is also provided, so that you can find out more.

Check out the coalitions operating in your state for ideas about potential partners in your area. A coalition elsewhere in your state may be able to give you a good lead for a contact in your own community!

The coalition listing also indicates which IRS regional territory it falls within and the website provides a listing of the IRS Territory Managers. You may contact the Manager in your region to find out more about outreach efforts and VITA programs operating in your area, even if a formal coalition is not already in place. ***You will also find the Territory Manager list on page 25 in the companion booklet, "Your Tax Credit Outreach Campaign: What You Need to Know".***

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For several years, the San Bernardino Transitional Assistance Department (TAD) in California has coordinated a



VITA program. TAD administers services in 15 offices throughout the county, including cash assistance, SNAP, and public housing as well as other services such as child care and refugee resettlement. Each office offers free tax preparation for the public from mid-January through the end of April; all of the offices provide VITA services in Spanish.

In November and December 2010, TAD called clients who were currently working or had worked in 2010 to see if they would be interested in receiving free tax preparation assistance. In January 2011, staff made additional phone calls and discussed the EIC, CTC, and VITA with clients during appointments. In addition, TAD distributed flyers in the community and sent a mass mailing to its entire contact list to promote the service.

Volunteer tax preparers at the VITA sites included 15 TAD staff plus 65 participants in the Subsidized Work Experience program (Welfare-to-Work). Working with the VITA site was one option for program participants to fulfill their work requirements. Participants go through a background check and orientation in addition to receiving VITA training. Participants are paid the minimum wage and can receive vouchers to purchase professional attire if needed. As a result of this work experience, many participants have gained full-time employment. In 2011, the 15 VITA sites filed 1,743 tax returns generating \$4,112,136 in federal refunds, including \$2,364,366 in EIC refunds.

Contact: Jessica Paran, TAD, (909) 252-4768, jparan@hss.sbcounty.gov

Public Benefit Programs

Many state and local government agencies that administer public benefits such as Medicaid, the Children's Health Insurance Program (CHIP), food stamps (now called SNAP) or subsidized child care, have ongoing contact with families and individuals who work and also receive public benefits. Enlisting such agencies in tax credit outreach is an effective way to reach large numbers of eligible workers on a regular basis.

Organizations engaged in outreach activities aimed at boosting enrollment in specific benefit programs like Medicaid and CHIP are natural partners and can be encouraged to inform families about tax credits as well. Similarly, Tax Credit Outreach Campaigns can alert families to the opportunity to obtain other benefits that may be critical to the health and well-being of their families.

STRATEGIES

- Work with state or county program administrators to arrange for information about tax credits for low-wage workers to be included in regular mailings to families and individuals receiving public benefits. Include a flyer or envelope stuffer with benefit checks, WIC coupons, program renewal notices, waiting list information, rent notices in public housing, or other mailings.
- Train eligibility workers to inform families seeking public benefits about the tax credits and free tax filing assistance. They can assure families that claiming the tax credits generally does not affect their eligibility for benefits such as food stamps, Medicaid or subsidized housing.
- Reach out to workers who previously earned too much to qualify for the EIC or the CTC and may now be eligible. They may have been laid off or had their work hours reduced. Connect with them through unemployment offices, job training programs and government assistance programs.
- Contact your local Workforce Investment Board, which is required to secure contracts to provide job readiness, job placement and post-employment

Glad You Asked That!

Q: Many people work and also get cash assistance. Can they still claim the EIC or the CTC?

A: Yes. As long as they earn wages and meet the income and other eligibility requirements.

Q: Will getting the EIC or the CTC lower the amount of other public benefits? Could someone lose benefits altogether?

A: The EIC and the CTC are not counted as income for any program that receives federal funding. The EIC and the CTC are not counted as a resource (also called an asset) in determining eligibility for benefits for 12 months after the refund is received. Often, if the beneficiary has few or no other resources, saving part of a tax credit refund does not cause the person to exceed the resource limit for a benefit program. For more information, see page 19 in the companion booklet, *"Your Tax Credit Outreach Campaign: What You Need to Know"*.

services to TANF recipients entering the labor force. Caseworkers can ensure their clients know about the tax credits and how to claim them — an important step in making a successful transition into the workforce. Encourage local boards to require companies receiving employment services contracts to provide workers with tax credit information.

- Include information about tax credits in electronic benefit screening programs. States and nonprofit groups have been developing electronic programs which screen families for benefits, including Medicaid, CHIP, LIHEAP (energy assistance) and WIC, and let them know they may qualify. Work with program designers to incorporate information about tax credits and free tax filing assistance. One benefit screener called HelpEngen, (formerly RealBenefits), can be tailored to screen families for EIC eligibility and to indicate how large a refund they may be able to get. Visit www.helpengen.com. For questions, contact: Enrique Balaguer, HelpEngen, (617) 275-2804 or ebalaguer@transengen.com.
- Connect with outreach workers who promote a variety of benefit programs. Provide them with tax credit information to share when they are signing families up for health coverage, food assistance or child care. Also, invite them to participate in tax credit outreach events and to be on hand at tax assistance sites.

FACT:

According to Food & Nutrition Service 2010 data, 40.7 percent of SNAP (food stamp) recipients are in working families.



Find It On the Web

www.eitcoutreach.org

- Tips for offering help with public benefits at a VITA site
- More Outreach Strategies and Examples
- More Questions and Answers on Tax Credits and Public Benefit Programs

Credit counselors at the Consumer Credit Counseling Service of Northern Idaho, Inc. (CCCSNI) in Lewiston discuss



the benefits of claiming the EIC and CTC with clients who are working to reestablish their credit. For two years, CCCSNI has also coordinated a VITA site. CCCSNI partners with Consumer Credit Counseling Service of Montana (CCCSM) which assists with VITA trainings and answers questions volunteers have about the tax software and filing complex tax returns.

CCCSNI displays posters about the tax credits during tax season and distributes approximately 320 flyers per year with specific information about its VITA site and other local free tax preparation services in the community. CCCSNI also publishes information about both VITA and tax credits in its quarterly newsletter, which it mails to all clients.

Contact: Linda Emerson, (208) 746-0127, linda.e@cccsnid.org

Consumer Credit Counseling and Money Management Services

Families throughout the country are confronting perhaps the most severe financial challenges they have ever experienced. Many are overwhelmed with debt, are seeing their savings plummet or are falling behind with their mortgage and other monthly payments. In increasing numbers, low- and moderate-income workers are seeking help from debt management assistance organizations, consumer credit counseling services, and home foreclosure prevention programs. These nonprofit organizations provide a range of financial services. They help clients create a budget, set financial goals, reduce monthly credit payments, and employ strategies for managing their money, paying bills on time, surviving a reduction in income and maximizing tax refunds. Such organizations are in a good position to help families understand that claiming the EIC and the CTC complement other approaches to addressing debt-related problems.

STRATEGIES

- Reach out to local affiliates of the National Foundation for Credit Counseling (NFCC). The majority of NFCC affiliates are Consumer Credit Counseling Services (CCCS) offices. They provide counseling on housing, credit and bankruptcy issues, as well as assistance in developing debt, money, and credit management plans. In addition to in-person assistance, CCCS organizations provide counseling online and over the phone 24 hours per day, 7 days a week. Tax Credit Outreach Campaigns can suggest ways they can share EIC and CTC information through one-to-one counseling programs, newsletters and websites. *To locate a NFCC member agency in your area visit: www.nfcc.org/FirstStep/firststep_01.cfm. If there is no NFCC affiliate in your area, check for affiliates of the Association of Independent Consumer Credit Counseling Agencies, www.credithelp4u.org or 866-703-8787. Alternatively, a community organization, such as a community action agency, may provide similar services.*
- Encourage consumer assistance organizations to incorporate information about claiming the EIC and

CTC into their intake, screening or orientation process. Tax Credit Outreach Campaigns can provide basic fact sheets and other materials about eligibility requirements, claiming procedures and locations of free tax preparation sites.

- Help counselors develop the capacity to provide more in-depth information about the tax credits to their clients. Train consumer assistance organizations to assist clients in determining if they qualify for the credits and link them to free tax filing assistance. Help them develop key contacts in the community so they can refer workers to Low-Income Taxpayer Clinics if they owe back taxes or need professional help with other tax related issues.
- Invite CCCS organizations to share information about their services at VITA sites and during tax credit outreach activities. Tax filers may be in need of the foreclosure prevention, credit counseling, homeownership and savings programs they offer. CCCS staff can distribute literature and sign people up for classes and personal counseling sessions. Credit counseling programs can also work with Outreach Campaigns to offer free credit reports at VITA sites. They can explain how to understand a credit report, how credit scores are used, and how tax refunds can be used to help improve credit history. Banks and credit unions can also partner with Outreach Campaigns to open checking or savings accounts at VITA sites so workers can have their refund directly deposited into the account. *To help taxpayers obtain free credit reports visit: www.annualcreditreport.com.*
- Help community organizations incorporate tax credit information into financial education classes, Individual Development Account (IDA) programs or investment clubs. While these programs tend to focus on developing assets for purposes such as buying a home or higher education, they can also help workers learn and understand how to avoid debt and protect their savings. Community organizations can offer financial education classes or can work with a bank or credit union that has already established a financial education program. Outreach Campaigns can help organizations include information about how tax credits can help workers meet specific goals as part of a class.

The Homeownership Preservation Foundation provides free foreclosure prevention counseling 24 hours a day, 7 days a week and can assist homeowners in developing a financial plan, contacting their lender and identifying local resources. For more information visit: www.995hope.org or call 1-888-995-HOPE.

FACT:

According to a survey conducted by the National Low Income Housing Coalition, on average, 69% of clients seeing housing counselors for foreclosure assistance are low-income.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies to Link to IDA Programs

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.

Contact: Eva-Maria Palermo, SJHMC, (602) 406-3025, eva-maria.palermo@chw.edu



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.



Contact: Tracy Fischman, AAM, (651) 287-0187 x105, tfischman@accountabilitymn.org



Find It On the Web

www.eitoutreach.org

- More Outreach Strategies to Link to IDA Programs

As part of its weatherization program, Northeast South Dakota Community Action Program (NESDCAP) in Sisseton employs crew members that make energy efficiency improvements to residential homes in its 17-county service area. They provide homeowners with energy kits that contain energy-conserving light bulbs, low-flow shower heads, and other items to help reduce energy bills. During tax season, the education packets NESDCAP distributes contain information about the EIC and CTC, along with tips on how to reduce utility bills and make homes more energy-efficient. The weatherization crew refers anyone who needs assistance with tax filing to local VITA sites. During 2011, NESDCAP weatherized 413 homes and distributed energy kits and education packets to each home.

NESDCAP has offered free tax filing assistance services since 2005 and operates two permanent VITA sites and 12 outreach sites. Its partnerships with financial institutions and non-profit organizations help NESDCAP promote the tax credits and free tax preparation. NESDCAP also provides taxpayer education services on topics such as bookkeeping strategies, financial education opportunities, and budgeting strategies. In 2011, NESDCAP helped 552 taxpayers claim more than \$349,000 in EIC refunds.

Contact: Paula Jensen, NESDCAP, (605) 698-7654 x33, paula@nesdcap.org



Workers Employed in Green Jobs

Green jobs are jobs that contribute to greater environmental quality. While some green jobs require advanced skills, careers in the green jobs sector can begin at an entry level and can provide a pathway out of poverty for some workers. Employment opportunities include weatherizing homes, retrofitting commercial buildings and private homes, conducting energy audits on businesses and residences, installing wind and solar panels, and manufacturing energy saving products. Many workers entering this field for the first time are likely to earn incomes that qualify them for the EIC and CTC. Since the tax credits provide such valuable support for employees, it is important to inform workers entering new green job employment about the availability of the EIC, CTC and free tax filing assistance.

STRATEGIES

- Work with employers in green industries to inform workers, as well as customers of green products and services, about the tax credits. Encourage them to include envelope stuffers with employee paychecks or distribute flyers to inform employees about the EIC and CTC. Train supervisors to deliver information and answer questions about the tax credits and VITA for employees, especially new hires. Offer to speak about the tax credits during an information session for employees.
- Enlist green jobs training programs to share tax credit information when participants enroll. Training sites that have financial aid offices — such as programs at community colleges — can display posters and provide flyers in waiting areas. Financial aid counselors can also communicate information about the tax credits to participants requesting help in paying for their training. If online registration is available, programs can send an email to new registrants about the tax credits and where to find free tax filing assistance.
- Encourage agencies referring participants to green jobs training programs to promote the tax credits. For example, job seekers often visit One-Stop

Career Centers to find information about employment and training opportunities. By promoting the tax credits and free tax services, these centers can show job seekers how to make their participation more feasible.

- Partner with organizations involved in green services such as home retrofitting or energy audits that cater to low-wage earners and inform them about the benefits of the EIC and CTC for their workers and clients. Invite them to join your outreach efforts and provide them with outreach materials.
- Coordinate a free tax filing assistance day at a job training program or business.
- If your organization hosts a VITA site, invite green businesses and job programs to set up a booth to promote green jobs and training opportunities.

FACT:

The American Recovery and Reinvestment Act of 2009 provided funding for the investment in green jobs. With approximately \$40 billion directed towards energy efficiency and renewable energy projects, including \$500 million for job training programs, more than two million new and current green collar workers are projected to establish careers and transition to higher paying jobs within the next few years.



Find It On the Web

www.eitcoutreach.org

- Links to Green Jobs Organizations
- Fact Sheet on Engaging Green Jobs Employers & Training Programs in Tax Credit Outreach — Why It's Important

Equitable Gas Company (EGC) is a natural gas company that serves residents in Pennsylvania, West Virginia, and Kentucky. For ten years, EGC has included information about the EIC, CTC, and the availability of free tax filing assistance in its Energy Matters news insert. In the 2011 filing season, EGC mailed 285,000 inserts with tax credit information to its customers in the three states.



Contact: Sandie Gagorik, Equitable Gas Company, (412) 395-3229, sgagorik@equitablegas.com

Utility Companies

Low-income households are facing tough times as they struggle to meet soaring electricity, natural gas, and heating oil prices, as well as the high cost of gasoline. High energy costs also push up the price of food and other necessities, putting even more pressure on families. As home budgets are squeezed, many households may find themselves in danger of having their power service disconnected. The EIC and CTC can provide the support many families need to keep on top of household bills.

Utility companies have experience helping customers avoid service shut-offs. They communicate with large numbers of low-income households each month and are well-positioned to help low-income families understand the advantages the tax credits provide. They also have direct contact with businesses in the community — their corporate customers — and can encourage them to join tax credit outreach activities.

STRATEGIES

Identify a champion within the local utility company to spearhead corporate involvement in your Tax Credit Outreach Campaign. This could be an executive in charge of consumer affairs or customer service. An outreach partner from the United Way or Chamber of Commerce may be able to introduce you to the right person. Once you have made the connection, suggest ways the utility company can help to enhance the campaign. They can be encouraged to:

- Insert tax credit information in monthly utility bills. “Bill stuffers” are a great way to reach all customers with basic information about the credits. Most companies decide on the content of bill stuffers a few months in advance, so plan ahead for a bill stuffer to reach customers in December or January, in time for tax filing season.
- Reach out to customers through direct mail. Utility companies may send special newsletters to customers in zip codes where eligible families reside. They may be able to target customers who have fallen behind in their bills or who have received energy assistance in the past. The mailings

Glad You Asked That!

Q: I am eligible for energy assistance through the Low Income Home Energy Assistance Program (LIHEAP). Will the EIC or CTC reduce the amount of assistance I can get?

A: Since the EIC and CTC do not count as income in determining eligibility for any federally funded program, they will not affect your LIHEAP eligibility or the amount of your benefit. For a list of state LIHEAP offices, visit: www.acf.hhs.gov/programs/ocs/liheap/grantees/states.html. To help workers in need of energy assistance, contact the National Energy Assistance Referral Project, (866) 674-6327 or energy@ncat.org for information on how and where to apply for LIHEAP.

can explain the basics of tax credit eligibility and free tax filing and can include a list of VITA sites in the area.

- Highlight the tax credits in consumer affairs broadcasts sponsored by the company. Some utility companies host consumer-oriented shows on local radio or TV. Designate a campaign partner to be interviewed. Invite a worker to talk about how the tax credits helped his or her family.
- Train customer service employees — especially staff in walk-in offices and those who handle billing inquiries — to promote the EIC, CTC and free tax filing assistance. To engage customers, display posters or produce a recorded message that plays while a caller is “on hold.”
- Alert their own employees to the tax credits by mounting posters in employee lounges, inserting information in paychecks or publishing an article in the employee newsletter. Employees who do not qualify themselves can tell family and friends about the credits. These channels also can be used to recruit volunteers.
- Provide resources to support the campaign in general. Utility companies may be able to offer direct or in-kind support such as printing or loaning laptops or donating them when company equipment is being replaced.
- Incorporate tax credit information when helping promote energy payment assistance programs such as the Low Income Heating and Energy Assistance Program (LIHEAP), a federal program that helps low-income individuals pay utility bills to avoid shut-offs.

FACT:

A survey of EIC recipients conducted by Syracuse University's Maxwell School of Citizenship and Public Affairs have found that “paying back utility bills” is one of the top ways workers spend their EIC refunds.



**Find It On
the Web**

www.eitcoutreach.org

K-State Research & Extension Riley County (KSRERC) partners with the Manhattan and Riley County Public School



Systems in Kansas to distribute information about the EIC, CTC, and its VITA site.

KSRERC arranged to send information in February 2011 to 450 families and faculty members in Riley County and 5,000 students in the Manhattan public schools by working with a public information officer, district superintendents, principals, and building secretaries.

KSRERC also promotes its VITA site through media outlets. On Facebook, it posts tax tips and VITA information. KSRERC staff conducted a 15-minute radio segment on the "In-Focus" talk show in mid-January 2011 to provide information about the tax sites and various tax tips. Additionally, KSRERC participated in a press conference organized by the county commission and had three news stories about the VITA site air on the radio during the tax season. In 2011, the KSRERC VITA site completed nearly 400 tax returns generating more than \$553,000 in federal refunds, including \$164,714 in EIC refunds.

Contact: Jennifer Wilson, KSRERC, (785) 537-6350, jrwilson@ksu.edu

Schools

Working with schools offers many opportunities to reach families that may qualify for the tax credits. Schools are usually viewed as trustworthy institutions and families pay attention to information children bring home from school. School administrators are often willing to help with tax credit outreach efforts since they know that a secure home environment promotes school achievement. Many have recognized the value of the EIC and the CTC in contributing to family stability.

STRATEGIES

- Ask school officials to share tax credit information with families who are likely to qualify. Focus on schools in which many students are eligible for free or reduced-price meals, or Title I schools, which serve elementary school children in low-income communities. Your state Department of Education can tell you which school districts have these programs. Enlist school superintendents or individual principals to distribute information along with notices of eligibility for school meals or with other materials such as school newsletters, report cards and lunch menus.
- Recommend that your state PTA provide information on the EIC and the CTC to all local PTA presidents and encourage them to share the information with families through mailings and community assemblies. Offer to arrange for a speaker to talk about tax credits for working families at an upcoming PTA meeting.
- Make sure school counselors know about the EIC and the CTC and where families can get free tax assistance. These school employees frequently come into contact with families in financial crisis.
- Ask administrators to provide tax credit information to General Education Diploma (GED) classes and to send information with GED certificates.
- Engage community colleges and technical schools in outreach. Students who have returned to school to improve their job skills and are working part-time or at low wages may be eligible for the

Glad You Asked That!

Q: Can a working family claim a child for the EIC if she is a college student living at school?

A: Full-time students up to 24 years of age can be qualifying children for the EIC. If the student lives away from home to attend school, it is considered a “temporary absence” and the student still can count as a qualifying child.

Q: If a student gets financial aid, can his family still get the EIC or the CTC?

A: Non-taxable scholarships and grants are not considered income in determining eligibility for the EIC and the CTC; taxable grants and scholarships also are not considered “earned income,” but are included in determining “adjusted gross income,” which may affect eligibility for the EIC and the CTC. Check with IRS at 1-800-829-1040 to find out which scholarships and grants are taxable or non-taxable.

Q: If a family gets the tax credits, will it mean the student won’t qualify for financial aid?

A: EIC and CTC refunds are not counted as family income in determining financial aid eligibility.

EIC and the CTC. Others who are taking non-credit courses to learn about personal finance issues, such as homeownership, also may be eligible.

- Involve students in conducting outreach in the community. Many schools have incorporated community service activities into the curriculum. Students can help publicize the EIC and the CTC and assist at VITA sites. Fraternities and sororities, as well as other student associations, can take on tax credit outreach projects.
- Partner with high schools to provide free tax filing assistance. High school VITA sites deliver a needed service, especially in under-served communities. Contact the principal, superintendant or administrator of a local high school to discuss how a VITA site can benefit your community. *For strategies to organize a high school VITA site, see “High Schools: A Resource for Free Tax Preparation,” at www.eitcoutreach.org.*

The American Opportunity Tax Credit is worth \$2,500 and can be used for tuition and course materials needed to pursue an undergraduate degree. Up to \$1,000 of this credit can be claimed even if no income tax is owed.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- More Questions and Answers on Tax Credits and Student Financial Aid
- Fact Sheet on American Opportunity Tax Credit
- Fact Sheet on High Schools: A Resource for Free Tax Preparation

The Employment Opportunity and Training Center (EOTC)

is a nonprofit agency that provides parent-child education and workforce services in Lackawanna County, Pennsylvania. EOTC also coordinates efforts to support people who are incarcerated to successfully return to their communities. Promoting Responsible Fatherhood is a post-release program that helps both former prisoners and other county residents find employment and promotes healthy family relationships. EOTC presents employment and financial stability information and resources to about 1,200 new clients each year. As part of its programs, staff discusses the EIC and CTC and gives participants flyers about the tax credits and local VITA sites. EOTC also distributes EIC and CTC information through specialty courts, such as drug treatment education programs, which are an alternative to incarceration.

Contact: Nina Olmedo, EOTC, (570) 348-6484, nolmedo@eotcworks.org



Individuals Released From Prison or Workers with a Relative in Prison

According to U.S. Department of Justice reports, nearly 730,000 former state and federal prisoners reentered communities in 2009. Individuals with criminal records often have trouble finding employment and since they may be “starting over”, their resources are extremely limited. When they do obtain a job, it is often low-wage or intermittent employment, making it difficult for them to achieve financial stability. Another ten million individuals are released from local jails each year and experience similar barriers to employment. The EIC and CTC can provide additional support for eligible former prisoners which improve their ability to obtain long-term employment and reduce the risk of recidivism.

In addition, the Department of Justice reports that in 2007, more than half of the 1.5 million adults incarcerated in state and federal prisons were parents of minor children. When a parent is incarcerated a relative often steps in to care for the child. Since these relative caretakers are likely to not have budgeted for raising a child, the EIC and CTC can help family members who become the caregivers of the child of a person who is incarcerated.

STRATEGIES

- Enlist state and local prisoner reentry programs, including rehabilitative programs and post-release transitional programs. These programs often provide job training and job placement assistance for former prisoners to secure employment upon their return to the community. Outreach Campaigns can train staff working with prisoner reentry programs about the tax credits so that they can incorporate information into their services.
- Work with parole agencies to help ensure individuals who are approaching release from prison are aware of the EIC, CTC, and free tax filing assistance upon their reentry into the community. Some parole agencies help link parolees to job training programs.

Glad You Asked That!

Q: Can individuals be eligible for the EIC or CTC based on working in prison?

A: Individuals cannot receive the EIC or the CTC based on their earnings in prison. However, if individuals work and earn income during the same year that they enter prison, they may qualify to claim these tax credits if otherwise eligible.

Q: Some employers are hesitant to employ people who have spent time in prison. Are there any tax credits to encourage employers to hire individuals recently released from prison?

A: Yes, the Work Opportunity Tax Credit (WOTC) can reduce employers' federal income tax liability by as much as \$2,400 for every qualified new worker hired from one of nine categories, including former prisoners. New employees must be hired within one year of the last date on which he or she was released from prison. *For additional information, visit: www.doleta.gov/business/Incentives/opptax.*

- Establish partnerships with corrections officials to include EIC and CTC information in financial education classes. Some new inmates may be eligible to claim these tax credits based on work completed prior to entering prison. The tax credits can provide an opportunity for prisoners to have some funds available upon their release or to help support their families.
- Educate local public defender and legal aid office staff. In addition to providing legal representation, such offices may appoint case managers to assist clients in finding community resources. These legal offices can provide information about the tax credits and where to find free tax filing assistance.
- Ensure that relatives caring for children of a parent who is in prison are aware of their eligibility for the EIC and CTC. Work with organizations that serve relatives of inmates. Some communities operate programs for children of incarcerated parents, such as emergency childcare, day care, and part-time summer camps. Family and Corrections Network is a national organization that provides support for families of prisoners. *Visit: www.fcnetwork.org.*
- Encourage groups that advocate for individuals released from prison and/or workers with a relative in prison — such as local community and faith-based organizations — to display tax credit posters in highly visible areas, such as laundry mats, gas stations and convenience stores. Groups can also host an event to highlight the support systems needed for former prisoners reentering society.

The National HIRE (Helping Individuals with Criminal Records Reenter through Employment) Network provides a clearinghouse of information about state and federal government agencies and community-based organizations across the country that may assist former prisoners reentering the community. To find such groups in your area, visit the resource page: www.hirenetwork.org/resource.html.



Find It On the Web

www.eitcoutreach.org

- Tax Credit Flyer for Formerly Incarcerated Individuals
- Tax Credit Flyer for Caregivers of Children with a Relative in Prison



Since 2005, Gallaudet University (GU) in Washington, D.C., has coordinated a free tax preparation site. As one of the nation's largest undergraduate universities for the deaf and hard of hearing, GU utilizes tax preparers who are fluent in American Sign Language (ASL) and who can also assist hearing taxpayers.

In 2011, GU partnered with the D.C. EITC Campaign (DEC) and Capital Area Asset Builders — a Real Economic Impact Tour participant — to expand the availability of free tax filing services for deaf taxpayers in the D.C.-metro area during a one-day education and outreach event. The event was held at a local library and utilized its Adaptive Services Center, which provides resources for people with disabilities. An IRS representative who is deaf conducted two tax information and Q&A sessions in ASL for deaf taxpayers. GU volunteers were also available to assist attendees who wanted to file their own tax returns through the mobile MyFreeTaxes.com VITA van. Since the library hosts one of DEC's VITA sites, other taxpayers who wanted a tax preparer to file their returns could also file their taxes as part of the event.

In addition, DEC provided sensitivity training for volunteers at its other VITA sites to help make the sites more welcoming to taxpayers with disabilities.

For the 2010 tax year, DEC filed 883 tax returns for taxpayers with disabilities.

Contact: J.C. Craig, DEC, (202) 547-7773, jccraig@communitytaxaiddc.org

Workers with Disabilities and Families Raising Children with Disabilities

Low-wage workers with disabilities and families that are raising children with disabilities face profound challenges. Finding transportation to and from the job may be costly and difficult to arrange. Out-of-pocket health care expenses may be higher than for other families. Securing child or adult day care for a family member with special needs may pose a financial burden. For these reasons, the income boost that the EIC and the CTC provide can be vital. Outreach efforts can inform families that special rules may help them qualify if they work and have a severe disability or are raising a child with a severe disability. Such efforts also can allay fears that claiming the credits will jeopardize the public benefits that people with disabilities depend on.

The 2009 IRS Benchmark Study found that 54 percent of taxpayers with disabilities earn less than \$20,000. Only 36 percent of taxpayers with disabilities are aware of free tax preparation services, and just six percent reported using them. Many families and individuals may not know about the tax credits.

STRATEGIES

- Enlist groups that advocate for people with disabilities. The Consortium for Citizens with Disabilities (CCD) is a coalition of approximately 100 national disability organizations. CCD members include organizations such as Easter Seals, Family Voices, the Arc of the United States, United Cerebral Palsy, the National Alliance for the Mentally Ill and others that have members throughout the country. *To contact CCD members, visit www.c-c-d.org. You also may find potential partners by contacting the National Council on Independent Living. For more information, visit www.ncil.org.*
- Encourage "Disability Program Navigators" (DPNs) to incorporate tax credit outreach into their routine discussions with people seeking employment. The Disability Navigator Initiative is a joint project of the U.S. Department of Labor (DOL) and the Social Security Administration which aims to help people

Glad You Asked That!

Q: Can a person who receives disability benefits get the EIC and the CTC?

A: To be eligible for the EIC, individuals must have earned income. Most disability-related benefits are not considered earned income, but a person who received long-term, employer-paid disability benefits and is under minimum retirement age can qualify for the EIC, even if he or she did not work during the tax year. Such disability benefits are considered earned income. Social Security Disability Insurance, SSI and military disability pensions are not counted as earned income.

Q: Can children with disabilities be claimed for the tax credits?

A: A person of any age with total and permanent disabilities may be claimed as a “qualifying child” for the EIC. A child claimed for the CTC, including a child with disabilities, must be under age 17 at the end of the year.

with disabilities better understand work support programs and other services available through DOL One-Stop Career Centers. Provide DPNs and One-Stops with tax credit outreach materials. *For more information, visit www.doleta.gov/disability/new_dpn_grants.cfm. To locate DOL One-Stop Career Centers in your state, visit www.doleta.gov/usworkforce/onestop/onestopmap.cfm.*

- Reach out to your state’s Work Incentive Planning and Assistance (WIPA) Project, formerly known as the Benefits Planning, Assistance and Outreach (BPAO) Program. The Social Security Administration (SSA) funds community-based organizations in every state to help SSA beneficiaries with disabilities make informed choices about work. Ensure that WIPA Community Incentive Coordinators have the information they need to alert people to the tax credits and how to claim them. *For a directory of WIPA Projects across the country, visit <https://secure.ssa.gov/apps10/oesp/providers.nsf/bystate>.*
- Encourage state agencies that provide services to people with disabilities (such as agencies for vocational rehabilitation, supported employment, supported living, mental health, mental retardation or developmental disabilities) to share information about the EIC and the CTC with program participants and their families.
- Take steps to ensure that free tax assistance sites are accessible to people with disabilities. Until existing sites can be modified, a mobile tax assistance site or home visiting program may be good alternatives.

The Real Economic Impact Tour operates in more than 100 cities and focuses on ensuring that people with disabilities know they may qualify for the tax credits and can claim them. For more information, visit www.reitour.org.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- Fact Sheet on the Tax Credits and People with Disabilities
- More Questions and Answers on the Tax Credits for People with Disabilities

MetroCASH in Richmond, Virginia coordinates 11 VITA sites as part of its



coalition, including one that offers free tax preparation and Individual Taxpayer Identification Number (ITIN) application services in Spanish. Ramsey Memorial United Methodist Church hosts the site where volunteers from the City of Richmond Hispanic Liaison Office (CRHLO) help immigrant tax filers prepare, copy, and notarize ITIN applications so that clients can mail everything to the IRS. CRHLO delivers its services through over 30 bilingual tax preparers, volunteers, greeters, notaries, and interpreters, including some high school and graduate school students. CRHLO also prints all of its materials in English and Spanish.

During its fourth year as a VITA site in 2011, CRHLO filed 186 returns generating \$281,319 in federal refunds. As a member of the MetroCASH coalition, CRHLO promotes all MetroCASH services, including its CASH Coach program which connects clients to free financial programs and services in the community. The 11 MetroCASH coalition VITA sites filed 2,093 tax returns in 2011 claiming \$2,577,866 in federal refunds, including \$932,216 in EIC refunds.

Contact: Dominique Derbigny, MetroCASH, (804) 775-6433, derbignyd@yourunitedway.org

Immigrants and Workers Whose First Language is Not English

Workers who are not proficient in English often earn low incomes and may not understand that they can qualify for the EIC and the CTC. It is especially important for outreach messages to emphasize that immigrants who are legally authorized to work and have Social Security numbers (SSNs) may be eligible for the EIC, and that families may qualify for the CTC even if all family members do not yet have SSNs. Conducting outreach only in English will miss eligible workers who can greatly benefit from this information and assistance.

STRATEGIES

- Use bilingual materials. This kit includes flyers, posters and envelope stuffers in English and Spanish. Flyers in 19 additional languages also are available on our website at www.eitcoutreach.org.
- Dispatch bilingual staff or volunteers to explain the tax credits and answer questions at presentations to community groups or in one-to-one conversations. Immigrant workers may have trouble understanding complex tax rules or they might have been denied other public benefits, such as food stamps (now called SNAP) or Medicaid, in the past and might assume they do not qualify for tax benefits. Immigrants may incorrectly believe that claiming tax benefits could jeopardize their immigration status or their ability to become a citizen.
- Provide information about the EIC and the CTC through Newcomers Clubs, settlement houses, immigrant aid associations and legal services. Organizations such as Catholic Charities, Jewish Family Services and Mutual Assistance Associations (MAA) provide helpful services to refugees. *To find the MAA in your state, visit www.acf.hhs.gov/programs/orr/partners/maas.htm*
- Partner with organizations that are likely to have bilingual and bicultural staff, including educational and social programs sponsored by churches, mosques or synagogues. Encourage schools to

Glad You Asked That!

Q: Can immigrant workers get the EIC?

A: Many immigrants who are legally authorized to work can get the EIC. The immigrant worker, his or her spouse, and children listed on the Schedule EIC must each have a valid Social Security number that permits work in the U.S. The “qualifying children” must have lived with the worker in the U.S. for more than six months of the year. Also, the worker’s main home must be in the U.S.

Q: Can immigrant workers get the CTC?

A: If they qualify, immigrant workers can get the CTC if they or their qualifying children have either a valid SSN (including a non-work SSN) or an Individual Taxpayer Identification Number (ITIN). The child must be a U.S. citizen or resident alien who lives in the U.S.

provide bilingual material about the tax credits, and work with English as a Second Language (ESL) programs or migrant education coordinators. Community events, such as health fairs, educational programs, job fairs, or holiday festivals also present outreach opportunities.

- Enlist businesses in immigrant communities, such as ethnic grocery stores or restaurants, barber shops or nail salons. They are important places to display posters and flyers and to talk directly to customers.
- Promote multi-lingual free tax help in the community. Immigrant workers and workers who have limited English proficiency may be especially vulnerable to ill-trained or dishonest commercial preparers. To provide an alternative, encourage trusted institutions in the community to establish VITA sites and recruit VITA volunteers. When advertising VITA sites, indicate which sites provide services in languages other than English.
- Work with non-English language media. Many non-English-speaking communities have their own radio and TV programs and newspapers. Encourage news coverage, run ads, write articles and develop public service spots on the tax credits. Identify the best times for broadcasting. For example, farm workers may listen to the radio in the pre-dawn hours before beginning work in the fields. *For information on Spanish language media, contact National Council of La Raza at (202) 785-1670 or comments@nclr.org. For other non-English media by language or ethnicity, visit [New America Media at \[news.newamericamedia.org/directory\]\(http://news.newamericamedia.org/directory\). Note: Membership is required to access some features.](http://NewAmericaMedia.org/directory)*

FACT:

According to the 2010 Census, over 59 million people reported speaking a language in addition to or in place of English at home.



Find It On the Web

www.eitcoutreach.org

- Tax credit flyers in 21 languages including English and Spanish
- More Outreach Strategies and Examples
- More Questions and Answers on Tax Credits and Immigrant Workers
- Information on Individual Taxpayer Identification Numbers (ITINs)



Since many residents without children do not realize that they may qualify for the EIC or other government-funded subsidy programs, Community Teamwork, Inc. (CTI), a Community Action Agency in Lowell, Massachusetts, makes special efforts to highlight this information as part of its outreach efforts to promote its programs and VITA site. All CTI outreach materials, tax preparation flyers, and financial education resources note that both individuals and families may be eligible for its services, which include affordable housing, job training, nutrition education, weatherization, and fuel assistance programs.

CTI also partners with the local Department of Employment Training (DET) program, which provides training, resume services, and other job preparation services for clients, including workers without children. DET distributes CTI's VITA flyers, helps clients assess their eligibility for the EIC, and schedules appointments for free tax filing assistance.

For eight years CTI has operated a year-round VITA site, filing 550 returns during the 2011 tax filing season. To promote the VITA site, in 2011 CTI conducted outreach presentations to local agencies and organizations about the EIC, CTC, and CTI's free tax preparation services.

Contact: Gail Fortes, CTI, (978) 654-5676, gfortes@comteam.org

Workers Not Living with Children

Tax credits can represent a useful income boost for low-wage workers who do not have children living with them — including non-custodial parents and childless workers. Workers not living with children who earn less than \$13,660 (or \$18,740, if married) receive only a small EIC (averaging about \$260), but non-custodial parents may be able to claim a substantial CTC if they are permitted by a divorce or separation agreement to claim a child as a dependent. The CTC can be worth up to \$1,000 per dependent child under age 17 for workers who earned more than \$3,000 in 2011. It is important to bring this news to workers who may know they do not qualify for the EIC, but who may not understand that they could qualify for the CTC.

STRATEGIES

Many of the places that are natural gathering points for families with children — such as schools and child care programs — may not be fruitful outreach settings for this group of workers. Special strategies are needed:

- Target workers who are likely to have been employed on and off during the year. Distribute materials at: pick-up and drop-off spots for day labor; hotel, motel and other service worksites that may hire seasonal employees; General Assistance, SNAP (food stamp) or unemployment offices; and programs serving migrant workers.
- Identify individuals whose circumstances have impeded their efforts to work. Try reaching them through: Veterans Administration hospitals or service centers; transitional housing programs; homeless shelters, food banks and soup kitchens; probation offices; half-way houses or mental health or substance abuse service centers; and literacy or GED programs.
- Reach out to workers in school or training programs. Distribute materials at: universities with non-traditional students; community colleges;

Glad You Asked That!

Q: What special forms must non-custodial parents complete in order to claim the CTC?

A: Non-custodial parents eligible to claim the CTC must use the 1040 or 1040A and attach Form 8332, "Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent," which requires the custodial parent's signature, and Form 8812 to claim the CTC. (They may not use the 1040 EZ.)

English as a Second Language or literacy programs; vocational rehabilitation centers; and job training programs.

- Alert the state or county Child Support Enforcement agency (also referred to as the IV-D agency), which establishes child support orders typically requiring non-custodial parents to pay a set amount of child support each month — and provides services to enforce these orders. As part of its work, the IV-D agency may have contact with non-custodial parents and can use such opportunities to provide information about how they may qualify for the tax credits.
- Provide tax credit information when child support obligations are being established either through a court or an administrative process. Decisions about which parent claims the child as a dependent for tax purposes are often made at this time. Information about the CTC can be provided to both parents at the same time they are notified about the process for establishing child support.
- Ask employers to help inform workers about the tax credits. A special note about the availability of the CTC may be of particular interest to non-custodial parents whose child support payments are being deducted from their paycheck.
- Reach out to Fatherhood Programs. This broad range of community-based human service initiatives are aimed at nurturing men in their roles as fathers and caregivers to children. Some groups are geared toward assisting fathers in particular circumstances or life stages, such as teen fatherhood programs; others focus on helping young men develop employment and life skills, as well as parenting skills.

FACT:

In 2010, workers not raising children who are eligible for the EIC had average annual earnings of about \$7,441. About half of them work in service industries. About 19 percent work full-time, year-round. About 49 percent are single men and 34 percent are single women. About 16 percent are married.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- Fact Sheet on the Tax Credits and Workers Not Living With Children

Hilltop Promises is an all-volunteer, community-based nonprofit organization that offers a range of services for the public and people who are homeless in Richmond, Virginia. Since 2001, it has provided free tax preparation services as a year-round VITA program. In 2011, approximately 10 percent of all its VITA clients were homeless. Hilltop Promises distributes flyers in the community to promote all of its year-round services including financial education, computer and parenting classes, job training programs, health care services, clothing distribution, and services to take phone messages and receive mail for the homeless.

As a member of the MetroCASH Coalition, the Hilltop Promises VITA site is included in all of the coalition's outreach materials and activities. In 2011, the site filed 489 tax returns generating \$504,505 in federal refunds, including \$169,824 in EIC refunds. Hilltop Promises also completed 462 prior-year returns.

Contact: Carolann Pacer-Ramsay, Hilltop Promises, (804) 912-2710, carolann@hilltoppromises.org



Workers Who Are Homeless

Workers who are homeless face serious challenges that may prevent them from claiming the EIC and CTC. Without a stable place to live, workers who are homeless may not receive mail consistently, making it hard to be sure they will receive the documents needed to file a tax return and claim tax credits. Sometimes, people who are homeless are unable to keep track of documents they may have received or their documents have been destroyed.

STRATEGIES

- Let workers know they can file a tax return and claim tax credits even if they do not have a permanent address. Shelters or other service providers, such as a health care clinic or a drop-in day center, can allow residents or clients to use their address for tax purposes. Organizations that do this should ensure their mail-handling procedures are secure and provide a way for refund checks to reach workers safely. Some organizations require mail to be opened in front of two staff members so that both can verify that checks were received.
- Enlist food banks, soup kitchens, shelters, transitional housing programs and local welfare agencies that come in contact with homeless persons. Work with shelters to establish free on-site tax filing clinics. Engage job placement assistance programs for homeless persons in tax credit outreach. They can extend their efforts by informing employers with whom they work about the credits and encouraging them to share information with all of their employees.
- Contact national organizations that have state or local affiliates to identify local groups providing services for people experiencing homelessness, such as the National Coalition for the Homeless, (202) 462-4822, www.nationalhomeless.org, the National Alliance to End Homelessness, (202) 638-1526, www.endhomelessness.org, the National Law Center on Homelessness & Poverty,

Glad You Asked That!

Q: If a person who is homeless has lost the papers they need to file taxes, what can they do?

A: If a worker cannot get a copy of their documents from their employer, he or she can complete Form 4852, "Substitute for Form W-2, Wage and Tax Statement," or Form 1099-R, "Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc." This form requests information about wages and taxes withheld, so it is helpful if workers have documentation, such as a final pay stub, when completing this form. Workers without a final pay stub may still be able to complete the form by estimating their earnings. It will be helpful to get assistance from a local VITA site on how to do this.

(202) 638-2535, www.nlchp.org and the National Coalition for Homeless Veterans, (800) VET-HELP (838-4357), www.nchv.org.

- Reach out to your state's Coordinator for the Education of Homeless Children and Youth. School districts are also required to have a homeless "liaison" to coordinate educational services for students who are homeless. Encourage your school district's liaison to provide information about the EIC and CTC to families.
- Explore using "street newspapers," which raise public awareness about poverty and homelessness by publishing articles by people who are homeless or formerly homeless, advocates and professional writers and are sold by people who are homeless. Outreach Campaigns can encourage publishers to inform sellers about the tax credits, to publish stories about the tax credits, and to advertise the locations of local VITA sites. Place an advertisement to recruit volunteers for free tax filing assistance. *To find out if there is a street paper in your area, visit the North American Street Newspaper Association, www.nasna.org.*
- Connect with your city's "Plan to End Homelessness" by enlisting participating groups in tax credit outreach activities. These initiatives were spearheaded by the U.S. Interagency Council on Homelessness, the U.S. Department of Housing and Urban Development, the U.S. Conference of Mayors, the National Association of Counties and the National League of Cities. *To find out if your state or city has a "Plan to End Homelessness" visit www.endhomelessness.org/section/solutions/community_plans and click on the "Ten Year Plan Database" under Library Resources.*

FACT:

According to the National Law Center on Homelessness & Poverty, research suggests that families make up one-third of the homeless population and that almost half of all people experiencing homelessness work.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples

The West Virginia Alliance for Sustainable Families (WVASF) works with seven regional coalitions to promote EIC & CTC awareness on a consistent, statewide basis. Each regional coalition advertises through local newspapers, and WVASF engages several marketing strategies to reach residents across the state, especially those in rural communities. Using radio, television, Facebook, Valpak coupon mailing inserts, and billboard advertisements, WVASF promotes more than 80 VITA locations that operate through October each year.



Also, during “America Saves” week in February, WVASF partners with BB&T bank to sponsor a roving VITA site that goes to rural areas of the state. To promote the mobile site, WVASF distributes flyers, places newspaper advertisements, and trains tax volunteers to visit employers to pass out tax credit and VITA site materials. In 2011, the site visited four rural counties, where in addition to free tax filing assistance, BB&T opened reduced-fee bank accounts for interested tax filers. Free credit reports, unclaimed property searches and CHIP (Children’s Health Insurance Program) enrollments were also made available.

In 2011, WVASF prepared approximately 20,000 state and federal tax returns providing \$28 million in refunds, including \$7 million in EIC refunds and \$3.6 million in CTC refunds.

Contact: Kelli Hinkle, WVASF, (304) 342-6972, khinkle@te-associates.com

Rural Communities

Wages in many rural communities are lower than in larger cities, making it more likely that workers may qualify for the EIC. However, since services of all kinds are less accessible than in urban areas — from social services and libraries to VITA sites and even commercial tax preparers — information about the tax credits and places to go for tax filing assistance may be less available. Outreach efforts are needed, especially in isolated communities, to provide a channel for tax credit information to reach rural workers.

STRATEGIES

- Rural communities tend to be close knit, so identifying trusted leaders and institutions will help get Outreach Campaigns started. For example, in some rural places a local minister might be a key starting point. Work with local organizations to help determine how to target outreach efforts.
- Ensure visibility and access by conducting outreach and free tax preparation in a community’s commercial center where rural residents go to fulfill multiple needs.
- Inform small business owners about how helping employees claim these tax credits can increase employee productivity. In addition to promoting the tax credits, some small businesses may be willing to serve as free tax preparation sites during or outside of business hours. Larger businesses such as factories and farms can also become engaged in outreach efforts. Rural areas with tourist attractions, such as bed and breakfasts, gift shops and restaurants, employ workers who may qualify for the EIC and CTC.
- Involve statewide organizations and businesses that may have connections in rural areas. Enlist the state Department of Human Services, the United Way or Catholic Charities in outreach. Encouraging a statewide approach to outreach will enhance the likelihood that rural areas are included.
- Collaborate with the Cooperative Extension Service. There are nearly 3,000 county and regional Cooperative Extension offices based at more than

100 land grant colleges and universities. In addition to addressing rural and agricultural needs, Cooperative Extension focuses on issues such as family financial management and community economic development. Extension offices can send information about tax credits to families, offer financial literacy classes, help set up VITA sites or provide training to volunteers. *To identify offices in your state visit www.csrees.usda.gov/Extension.*

- Find out when there are community events and how to become involved. For example, local sports events, festivals, church picnics, back-to-school nights, PTA meetings or regional conferences can offer great opportunities to reach many eligible workers at once.
- Take advantage of schools in rural areas. They can be an important channel for tax credit information and may also provide a central location for VITA sites. Community colleges and universities provide an important avenue to reach out to some working parents and low-income students not raising children.
- Create support for tax credit outreach by informing county commissioners and town councils about how the EIC and CTC can stimulate the local economy. In addition, these officials often hold other positions in the community and can influence a variety of organizations to lend their support to tax credit outreach efforts.
- Establish a mobile tax preparation site. A van, staffed with volunteers, can tour the region and prepare tax returns at pre-arranged locations. Or, individual staff members can carry a laptop and help workers file their taxes at home or where they work. Partnering with a community college can mean access to student volunteers and laptop computers to facilitate electronic filing. IRS offices may also loan computers to VITA sites.
- Use technology to bridge long travel distances. Videoconferences or webcasts can be used to conduct meetings, trainings or to file tax returns. Hospitals, local universities and community colleges, corporations and businesses, federal or state agencies, or Cooperative Extension Services offices may have the necessary equipment and may be willing to host a meeting. Alternatively, some websites offer “web conferences” or interactive “webinars” that allow people to come together. Keep in mind that these web-based tools may not be useful for Outreach Campaigns working in communities where high speed internet connections are not available.

FACT:

According to the Rural Policy Research Institute, 88 percent of the 386 counties with persistent high poverty rates (20 percent or higher from 1970 through 2000) are rural.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples

Citizens for Citizens, Inc. (CFC) in Fall River, Massachusetts is a Community Action Agency that provides free



tax preparation services for six counties in southeastern Massachusetts from January through April. Since 2004, CFC has served more than 2,000 residents each year through its VITA site, including foster parents. CFC conducts outreach efforts by distributing brochures and flyers to its current clients and attending gatherings for foster families throughout the year. More than 150 foster families receive information about the EIC and CTC annually.

Since the program's inception, CFC has filed more than \$1.2 million in EIC claims and saved southeastern Massachusetts taxpayers more than \$500,000 in commercial filing fees.

Contact: Paul Desmarais, CFC, (508) 679-0041, pdesmarais@cfinc.org

Foster Parents, Grandparents Raising Grandchildren and Other Relative Caregivers

Millions of children are currently in foster care or are being cared for by a grandparent or other relative outside the formal child welfare system. These families often do not know that they may be able to claim such children for the EIC or the CTC.

STRATEGIES

- Develop outreach materials that draw attention to the eligibility of foster parents and relative caregivers. Campaign materials that refer only to a parent's eligibility will miss many families that may qualify.
- Work with public foster care agencies. State agencies, such as child welfare agencies and agencies that administer TANF programs, may interact on a regular basis with foster parents and relative caregivers. Encourage them to incorporate information on claiming the EIC and the CTC in any training they provide for families. They also can send information about the tax credits with foster care payments and cash assistance payments and talk about the credits during home visits.
- Reach out to community-based programs that support foster parents with services such as family counseling and crisis intervention. Some organizations also offer help with school supplies and clothes.
- Involve foster parent associations and support groups. Ask your state foster care association to share tax credit information with local groups. Outreach Campaigns can offer to arrange a speaker for local meetings or write an article for association newsletters. *To locate your state and local foster care associations, visit the National Foster Parent Association website at www.nfpainc.org.*

Glad You Asked That!

Q: Rules for claiming foster children for the tax credits have changed in recent years. What do foster parents need to know?

A: Under current IRS rules, children who lived with a foster parent for six months or longer can be claimed for the EIC and CTC. (In the past, foster children had to live with the foster parent for the full 12 months of the year to qualify for these tax credits.) While this has made it a little easier to claim a foster child, another rule has made it more difficult: In order to claim a foster child, the child has to have been placed with the foster family by an authorized government or private placement agency.

- Ensure that Area Agencies on Aging, senior employment programs and programs that recruit seniors as volunteers — such as the Retired and Senior Volunteer Program (RSVP) — share information about the tax credits with seniors who are raising children. Tax Counseling for the Elderly (TCE), sponsored by the IRS, provides seniors and low-income families with free tax filing assistance. AARP is the largest TCE participant, providing services through its Tax-Aide Program. *To find the nearest Tax-Aide Program, contact AARP at 1-888-AARP NOW (1-888-227-7669). During tax time, locations are available on the AARP website at www.aarp.org/taxaide. Find information about the tax credit and other resources for grandparents at www.aarp.org/family/grandparenting.*

FACT:

According to the 2010 American Community Survey, more than 1.6 million grandparents raising grandchildren were in the labor force.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- Fact Sheet on Foster Parents
- Fact Sheet on Grandparents Raising Grandchildren

The Lakota Funds (TLF) in Kyle, South Dakota offers free tax preparation services to help Pine Ridge Reservation residents build assets and combat predatory lending. When TLF first became a VITA site in 2008, 78 percent of Pine Ridge Reservation tax filers purchased Refund Anticipation Loans (RALs). TLF has successfully reduced the use of RALs on the Reservation through its VITA services. In 2011, six staff filed 245 tax returns — a more than 300 percent increase since its first year. TLF estimates it saved tax filers more than \$110,000 in tax preparation fees over the past three years.



TLF partners with Oglala Lakota College, which provides classroom space for tax preparation at its college centers in all nine districts of the Reservation. TLF also promotes its VITA services through the radio and newspapers, brochures, and posters displayed throughout schools and businesses on the reservation. TLF's weekly one-hour radio show to promote the organization and its services focuses on the EIC, CTC, and VITA from January to April. TLF also records PSAs that air through the tax season starting in December.

TLF's weekly column in the Lakota Country Times, the most widely read newspaper on the reservation, highlights TLF's services and programs, which include Individual Development Accounts (IDAs); financial education, homebuyer, and business planning classes; credit building loans; and VITA. The newspaper also runs ads about the VITA services from December to April. The VITA services in 2011 generated \$453,177 in federal refunds, including \$227,344 in EIC refunds.

Contact: Tony Taylor, TLF, (605) 455-2500, ttaylor@lakotafunds.org

Tribal and Native Communities

Efforts to improve the economic status of Native Americans — approximately one in four of whom live in families with income below the federal poverty line — are increasing. Particularly in rural areas, small businesses, hotels and casinos are emerging and are contributing to economic growth. However, employees in small businesses generally earn low wages, as do workers in the service and tourism industries.

Poverty and other barriers to economic development among tribal communities stem from historical interactions with the federal government. Land trust regulations restricted resources and job opportunities. As a result, Native communities frequently are guarded about relations with the federal government or people who are not part of their community. Thus, eligible people in tribal communities may be hesitant to claim the credits. Tax filing may not only be intimidating, but may be perceived as being in conflict with traditional tribal values of self-reliance.

STRATEGIES

- Get to know the community. There are 565 federally recognized tribes, bands, nations, pueblos, rancherias, communities and Native villages, in addition to many other groups that are not federally recognized. It is important for outreach approaches and messages to be consistent with the values and beliefs of individual tribes, as well as community priorities. Native communities have limited resources, so it may be difficult for groups to commit to outreach, even if they support outreach goals.
- Reach out to urban Native Americans. More than 65 percent of the nearly three million Native Americans nationwide live in urban communities. The following ten cities have the largest American Indian and Alaska Native populations: Los Angeles, Phoenix, Anchorage, Tulsa, Oklahoma City, Albuquerque, Tucson, Denver, Portland, and Seattle.
- Work with a trusted organization in the community that may be interested in promoting the tax credits, such as: tribal health agencies, urban Indian centers,

Glad You Asked That!

Q: Can Native Americans claim the EIC and CTC even if they are exempt from federal income tax?

A: In general, Native Americans are not exempt from federal income tax on their earnings. Native Americans are only exempt if a treaty between a tribe and the U.S. government, or a U.S. statute, specifically excludes certain income from taxation. For example, a treaty may establish a tribe's right to tax-exempt fishing activities and tribal members earning income from fishing will be exempt from federal and state income tax. If the income is exempt from income tax, it is not considered "taxable earned income" for purposes of the EIC and CTC, and is not counted in figuring eligibility for, or the amount of, the credits. A worker may have earned income from other employment and can claim the EIC and CTC based on that income, if eligible.

tribal Head Start or housing agencies, and tribal councils. Community members will know the most effective ways to work with tribal elders and other leaders who play a pivotal role in influencing community priorities. Visit the *Tribal Leaders Directory* and view tribal leaders by region at http://apps1.eere.energy.gov/tribalenergy/pdfs/tribal_directory_2011.pdf or visit www.ncai.org.

- Engage tribal community colleges and universities, which serve career centers, libraries, economic development centers, public meeting places and child care centers. They may be able to provide computers, volunteers and a space for free tax preparation. Tribal colleges also can inform students about the EIC and CTC and encourage them to tell family members and neighbors. *The American Indian Higher Education Consortium provides information for all tribal colleges and universities in the U.S. at www.aihec.org.*
- Enlist Native media in informing people about the tax credits. They can deliver information in the language or dialect of the community. Newspapers can publish stories about how tribal members benefited from the credits and they can advertise free tax filing assistance. Non-Native media may also be influential in Native communities. For example, radio stations may schedule shows of particular interest to tribal members.

First Nations Oweesta Corporation publishes *Building Native Communities: A Tribal Leader's Guide to Launching an Earned Income Tax Credit (EITC) Campaign*. To find out more about the guides and to order free copies, contact First Nations Oweesta Corporation, (303) 774-8838 or jaci@oweesta.org.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- Links to a Broad Range of Tribal Agencies

The Fort Bliss U.S. Army post in El Paso, Texas has provided free tax filing assistance services for more than 25



years. Each year, a new officer is appointed to organize the post tax center. Since 2009, Fort Bliss has coordinated two VITA sites to serve the 27,870 people on post. The two sites serve active-duty service members, family members, and retirees and their dependents; they promote their tax preparation services (which include filing prior-year returns and state returns) through flyers and announcements. In 2011, 23 soldiers and seven civilian volunteers prepared more than 4,082 tax returns generating \$9,937,920 in federal refunds and \$1,871,735 in EIC refunds.

Contact: Maria Bustamante, IRS, (915) 834-6516, maria.e.bustamante@irs.gov

Military Personnel, Returning Veterans, and their Families

Many enlisted members of the military earn less than \$30,000 and are raising children. In addition, many National Guard members and Reservists have been activated for duty, which can result in a significant reduction in a family's income. When enlisted members transition out of the military, they tend to experience longer periods of unemployment than civilians and tend to earn lower wages. Military families and returning veterans may qualify for tax benefits such as the EIC or CTC, but may not realize they are eligible.

To address the needs of these families, the Office of the Secretary of Defense, in partnership with the IRS, has established VITA sites at 300 U.S. military installations. Military VITA sites file about 300,000 federal returns each year. While such assistance is important, it may not reach some members of the military, their families, or returning veterans. Family members who do not live near a military post and returning veterans may not get the relevant tax information they need, since they may seek help from people who are not well-versed in the special rules regarding military pay and eligibility for the EIC and CTC.

STRATEGIES

- Contact the Family Assistance Center for the military unit in your area to ensure it is aware of the EIC, CTC, and free tax filing assistance programs in the community. The National Military Family Association provides links at its website to Family Assistance Centers for the National Guard and Reserves. The American Red Cross and the Boys and Girls Clubs of America are other organizations that provide support to families of units called up for active duty. Their local chapters may also be good points of contact for efforts to reach military families. Contact the Government Relations Department, National Military Family Association, at 1-800-260-0218 or at info@MilitaryFamily.org for suggestions on who to contact or visit www.militaryfamily.org/resources/links/family-assistance-sites.html.

Glad You Asked That!

Q: What do military personnel need to know about claiming the EIC and the CTC?

A: Military personnel can claim the credits or be considered a qualifying child for the EIC or CTC whether they live in the U.S. or overseas. The IRS considers an individual assigned to an overseas tour of duty to be temporarily absent from the U.S. due to a special circumstance. Even if qualifying children remain in the U.S., the children may be claimed for the EIC and the CTC. Military couples living apart due to a military assignment must still file a joint return to claim the EIC and the CTC.

Q: How is combat pay counted in determining eligibility for the EIC and CTC?

A: Military pay received in a combat zone is non-taxable earned income, but it is treated differently than other forms of non-taxable earned income for EIC purposes. Military personnel can choose to count combat pay when figuring their eligibility for the EIC if it is an advantage. For example, adding combat pay to a family's earnings might raise the family's income above the EIC eligibility limit and the family would not want to count it. However, in families with little income, counting combat pay could result in a larger EIC and the family would want to do so. Combat pay must be counted as income in figuring the CTC. For the CTC, counting combat pay will always work to the family's advantage, enabling more military families to qualify.

- Connect with programs designed to support returning veterans. The Departments of Defense, Veterans Affairs, Transportation, and Labor partner to provide the Transition Assistance Program (TAP), which consists of three-day workshops for returning service members to learn resume-building, interview skills, tips for securing employment as well as information about veteran benefits. Similarly, Transition Assistance Advisors (TAA), in conjunction with the National Guard Bureau, provides support by phone, email and in person to link all service members to community resources and assistance in obtaining veteran healthcare services and benefits. Contact your local TAP or TAA office to discuss opportunities to share tax credit information with returning veterans. *To locate a TAP or TAA office near you, visit: www.vet-trans.org and click on "Transition Tools."*
- Engage job training and vocational programs. Returning veterans are often faced with the need to go back to school so that they can secure employment. Inform job training programs about the EIC, CTC, and free tax filing assistance.
- Contact a nearby military installation that has a VITA site. Ask whether veterans recently leaving the military might be able to use the VITA services offered at the post or base.



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- More Questions and Answers on the Tax Credits and Military Personnel
- Link to IRS Publication 3, "Armed Forces' Tax Guide"

As part of the Omaha EITC Coalition, United Way of the Midlands' 2-1-1 Center in Nebraska responds to calls about the EIC, CTC, and free tax filing assistance in Nebraska and Southwest Iowa. The Nebraska Statewide EITC Coalition also uses 2-1-1 as the hotline for its campaign. 2-1-1 gives callers information about free tax filing sites, including the location, contact information, and dates and times of operation. It also informs callers about documents they need to take with them when they have their taxes filed. 2-1-1 has served as the hotline for both coalitions for more than five years. From December 2010 through April 2011, 2-1-1 received 3,112 calls about the EIC, CTC, and VITA.



Contact: Lena Thompson, United Way of the Midlands, (402) 997-7002, lthompson@uwmidlands.org

Strategies for Promoting Free Tax Filing Assistance

A basic goal for any Tax Credit Outreach Campaign is to get the word out to low-wage workers that they may qualify for significant tax benefits. But, the outreach job is not done until they file their tax returns and obtain the tax credits they've earned. That's why a critical element of a successful campaign is the effort to link workers with free tax filing assistance, through the IRS-sponsored Volunteer Income Tax Assistance (VITA) program. While VITA is the largest such program serving working families, workers also use the AARP Tax-Aide program or other separate free tax preparation programs.

Hotlines

Set up a hotline to publicize free tax assistance sites, precluding the need for tax filers to rely on the IRS toll-free number which is often busy during the height of tax season. A local hotline can provide callers basic information about eligibility rules and locations for nearby VITA site. In areas where large numbers of residents speak languages other than English, a local hotline with bilingual operators can be critical to an Outreach Campaign's ability to help workers claim the EIC and CTC.

STRATEGIES

- Link up with an existing information hotline, such as information and referral (I&R) services (commonly run by United Way agencies) that already receive calls from individuals likely to be eligible for the EIC and the CTC. Operators may be able to answer tax credit questions during tax filing season. The United Way Worldwide coordinates a popular I&R service known as "2-1-1" which enables callers in all fifty states plus D.C. and Puerto Rico to dial 2-1-1 to find information on local human services programs. Many local Tax Credit Outreach Campaigns now use "2-1-1" as their hotlines. Visit www.211us.org to learn more.
- Help prepare for the extra volume of calls a hotline can expect to receive by contributing staff, volunteers or funds. Another possibility is to add tax credit information to Child Care Resource and Referral (CCRR) agency hotlines which help families in search of affordable child care. CCRR phone counselors can discuss tax credits with callers and

point out that tax refunds can be used to cover the out-of-pocket costs of child care. Large employers may have companywide hotline services to assist employees with concerns about transportation, child care, and other needs. Adding tax credit information makes sense.

- Establish a new hotline by hiring an answering service or engaging volunteers or a voicemail system. Your hotline can help callers determine if they are likely to be eligible for the EIC and the CTC or it can simply refer them to VITA sites.

Financial Institutions

Under the Community Reinvestment Act (CRA), financial institutions — including mainstream banks, community banks, credit unions and locally owned savings institutions — are evaluated on their efforts to help underserved neighborhoods gain access to credit and other financial services. Financial institutions have become enthusiastic Tax Credit Outreach Campaign partners and have helped tax filers open bank accounts and arrange for direct deposit of refunds.

- Encourage financial institutions to offer affordable bank accounts at free tax preparation sites and work with them to decide on favorable terms. For example, banks can waive or reduce monthly fees, minimum balances and penalties. A report from The National Community Tax Coalition (NCTC) explains desirable bank account features that can be negotiated with financial institutions. Enter *“Financial Institution Partnership Guidelines”* in the search box on NCTC’s website at www.tax-coalition.org.
- Enlist banks or credit unions to provide free check-cashing for people who do not have bank accounts or are not interested in opening one. One Outreach Campaign partnered with a bank to issue vouchers to tax filers at a VITA site that could be redeemed for free refund check cashing.
- Augment volunteer efforts by enlisting financial institutions to allow their employees to volunteer at a free tax site on company time. The Federal Deposit Insurance Corporation (FDIC) works with banks to organize such efforts. *FDIC regional offices can be found at: www.fdic.gov/about/contact/directory/#Regional/FieldOfficer.*

For two years, PNC Bank has partnered with VITA sites in Indiana, Maryland, New Jersey, Ohio, Kentucky,

Pennsylvania, and the District of Columbia.

For VITA clients who do not have a bank account and do not want to open one, PNC arranges for certain branches to cash their refund check free of charge. Clients must present a letter from their VITA site to receive this service. VITA sites issue clients up to two letters, which they must present at the bank to be able to cash their state and federal refund checks for free. PNC Bank also works with VITA sites to issue tax refunds loaded on no-fee debit cards.

In 2011, PNC Bank branches in the seven states cashed 143 refund checks for 121 taxpayers, providing \$191,000 in refunds, and issued 550 debit cards loaded with \$746,000 in refunds.

Contact: John P. Florio, PNC Bank, (412) 762-5839, john.p.florio@pnc.com



FACT:

A study by the Center for Financial Services Innovation finds that 18.5 million U.S. households do not have a bank account and are “unbanked.” The mean household income of the unbanked is \$23,600, making them potentially eligible for the EIC.

In 2011, Community Housing Resource Center (CHRC) in Vancouver, Washington expanded its free tax



preparation services to include self-preparation kiosks as part of a pilot test of the IRS' Free Assisted Self-Service Tax Preparation (FAST) initiative. This initiative is designed to help VITA sites offer taxpayers additional filing options, prepare more tax returns, increase electronically filed returns, and reduce waiting times during peak hours.

As part of the FAST initiative, CHRC designated four computers for clients to prepare their own tax returns. When clients came to the office, they completed a mini-interview so that staff could assess whether they were a better match for volunteer assistance or self-preparation of their returns. A CHRC-designated volunteer helped clients identify the most appropriate software package to file their taxes, answered questions, and reviewed tax returns prior to submission (if requested).

In 2011, CHRC filed 71 tax returns through FAST and 116 returns altogether, generating \$157,011 in refunds. CHRC was one of 18 organizations to participate in the FAST pilot in 2011.

Contact: Charlene Dahlen, CHRC, (360) 690-4496, Charlene@homeccn.org



Find It On the Web

www.eitcoutreach.org

- More Outreach Strategies and Examples
- 2011 Earned Income Tax Credit Estimator

Technology and the Internet

Use of the Internet has opened up many Tax Credit Outreach Campaign opportunities, from presenting new channels for publicizing campaign activities to linking low-income workers with technology that can save time and paperwork.

- Post information about VITA sites on your website and send email announcements to your contacts or listserv to inform them about free tax preparation services. Monitor VITA site schedule changes during the filing season so that you can update information as needed. You can also post information about eligibility for the EIC and CTC, including an online tool in English and Spanish for individuals to figure their own eligibility — search for “EITC Assistant” at www.irs.gov.
- Expand access to electronic filing (e-filing) at VITA sites by helping them obtain computer equipment. Local businesses that are upgrading their computers may be willing to donate their older models. The IRS can provide free software needed for e-filing. Talk to your IRS Territory Manager about the computer system requirements for this software.
- Let workers know how to obtain EIC and CTC tax forms at the IRS website, www.irs.gov/formspubs. Providing this information helps ensure that workers — especially those who choose to file their own returns — do so properly.
- Reach out to “digital divide” programs. While the number of low-income households with access to the Internet is steadily increasing, low-income families still are much less likely than higher-income families to have regular Internet access. Programs to address this gap, known as the “digital divide,” provide such families education and access to computers, the Internet and other technologies. These programs may assist families in learning to e-file their taxes.
- Use social media. Social media websites such as Facebook, Twitter and YouTube are tools that can be used to provide visibility for your campaign, disseminate information about free tax filing sites, recruit volunteers, and reach potential VITA clients. Create an account for your organization or for your outreach campaign. Provide regular updates year-round about the tax credits, VITA sites, money management and asset-building. Be creative!