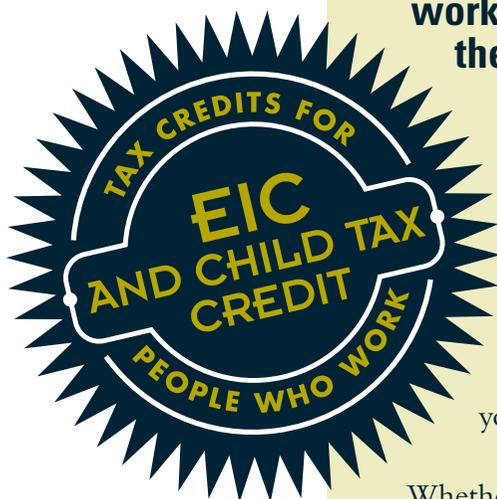


# Outreach Strategies: Promoting Tax Credits for Working Families

**You don't have to be a tax expert to help working families learn about and claim the EIC and CTC!**



Community organizations, social services providers, government agencies, labor unions, employers, advocacy groups and others can all play a vital role in bringing these tax benefits within reach of working families and individuals. This guide presents suggested outreach strategies as well as examples of activities being implemented by organizations like yours across the country.

Whether your goal is to incorporate basic outreach activities into your routine operations or to launch a full-fledged community-wide campaign, you will find what you need to know here. Additional outreach strategies are presented in a companion guide in this kit, *“Free Tax Help and Asset Development.”*

## Here's what's inside this guide:

### Getting Started — Tax Credit Outreach Campaign Basics

Partners, elements, timing, fundraising and materials . . . . .3

### Beyond the Basics: 13 Ways to Promote the EIC and the CTC

1. Coordinate with public benefit programs . . . . .8

2. Involve businesses and employers . . . . .11

3. Partner with schools . . . . .12

**NEW!** 4. Coordinate with emergency response efforts . . . . .14

5. Reach out to people who speak languages other than English — including immigrants . . . . .17

6. Inform workers with disabilities and families raising children with disabilities . . . . .19

7. Target special outreach efforts to workers not living with children . . . . .22

8. Inform workers who are homeless . . . . .25

9. Reach out to rural communities . . . . .27

10. Notify foster parents, grandparents raising grandchildren and other relative caregivers . . . . .29

11. Reach out to tribal and Native communities . . . . .31

12. Notify members of the military and their families . . . . .34

13. Use the media to bring your campaign together . . . . .35

### Additional Resources to Help Tax Credit

**Outreach Campaigns** . . . . .38

# Getting Started — Tax Credit Outreach Campaign Basics

## What Are the Earned Income Credit (EIC), Child Tax Credit (CTC) and VITA?

The EIC and CTC are federal tax benefits for low- and moderate- income workers. These tax credits can be worth thousands of dollars and can offset income and payroll taxes and supplement wages. Even if workers don't owe taxes, they may be eligible for the EIC and CTC. Some families can claim both credits. *For details about how these credits are calculated and who can claim them, see p. 3 and p. 5 of the booklet, "Facts," in this kit.*

To claim the EIC and CTC, workers must file a tax return. When it is time to file taxes, many workers seek help from a commercial tax preparer, often paying expensive fees. Since workers cannot get the EIC and CTC unless they file a tax return, it is essential for low-wage workers to know that there is an alternative – VITA!

The IRS-sponsored Volunteer Income Tax Assistance (VITA) program works with community organizations to provide free high-quality tax preparation services to low-income tax filers. IRS Territory Managers are assigned to each state to help Outreach Campaigns locate and establish VITA sites. *Contact information for IRS Territory Managers is included on p. 30 of the booklet, "Free Tax Help and Asset Development," in this kit.*

## Why promote the EIC and CTC and link workers to free tax preparation sites?

### **Workers may be unaware of the credits.**

Workers who were not eligible in the past may be able to claim these credits for the first time due to a change in employment that affects their income. People in low-wage jobs may not be aware that the credits can help them cover the costs of transportation, child care and other work-related expenses. Some workers, such as foster parents and grandparents raising grandchildren, may not realize they could be eligible, while families raising children with disabilities and military families may not know about special rules that may help them qualify.

### **Workers may not have experience filing**

**taxes.** New workers just entering the labor force may not have experience filing tax forms and are not likely to know what they need to do to get the EIC and CTC. Workers who earn less than the amount at which they are required to file a tax return may not see a reason to do so.

### **Workers may be unaware that free tax filing**

**assistance is available.** Many workers feel that they must pay a "tax professional" to ensure their taxes are filed correctly. Fees paid to a commercial tax preparer take money away from a worker's tax refund. Most workers don't know that free tax preparation is widely available through the VITA program.

## Who can contribute to an Outreach Campaign?

A wide variety of organizations, public agencies and businesses may come in contact with workers who are missing out on the EIC and CTC. Identify these potential outreach partners in your community. Make sure they know about the tax credits and how to promote them. Outreach partners may include:

- Community organizations and institutions
- Nonprofit health and human services providers
- Child care and foster care agencies
- Civic and service organizations
- State and local government agencies
- Community Development Corporations
- National employers and local businesses
- Labor unions
- Utility companies
- Food banks and Homeless shelters
- United Ways
- Legal assistance programs
- Faith-based groups

## How do you promote the EIC and CTC and encourage workers to use VITA?

There are numerous opportunities to inform workers about the EIC and CTC. Strong and successful Outreach Campaigns promote the tax credits through a diverse group of organizations. Building a citywide or regional network of groups will multiply the effectiveness of your campaign.

Some groups in your community may already be conducting outreach on the EIC and CTC. Organize a meeting to find out what everyone has

been doing and how you can work together as partners. If a network is not already established, consider forming a local coalition to help conduct a Tax Credit Outreach Campaign by bringing together state and local government agencies, social services providers, businesses, schools and universities, faith-based and community organizations, public officials and others.

When reaching out to other organizations, present the full range of outreach opportunities so that they can determine how they are best able to help. Some activities can easily be incorporated into an organization's routine work, while others may require additional planning. Below are five elements of a successful campaign.

### **1. Distribute tax credit information and direct workers to free tax filing assistance.**

Organizations can display posters in waiting rooms, lobby areas and other well-traveled locations. Information about the EIC, CTC and VITA sites can be included in newsletters, paychecks or other information that is mailed to people who might qualify. Outreach partners can add tax credit information to materials aimed at assisting lower-wage families. Businesses can include EIC, CTC and VITA information in employee orientation materials. *See page 7 in this booklet for ideas about how to use outreach materials included in this kit.*

### **2. Engage others in reaching out through their own networks.**

Hold trainings to help community organizations, public agencies and local businesses learn about the EIC and CTC and why it is important to inform their employees, clients and customers about these credits. Involve public officials and community leaders who have contact with a wide variety of agencies, civic groups and businesses. They also can provide name recognition to an Outreach Campaign which may help bring together a larger number of local organizations for

a more effective effort. *To obtain information from the National League of Cities on how city officials have gotten involved in Tax Credit Outreach Campaigns, see p. 38 of this booklet.*



To kick-off the tax season, the Little Rock EITC Working! Coalition hosted an event with a Super Bowl football theme at the end of January 2006, right before the Super Bowl.

Congressman Vic Snyder, Little Rock Mayor Jim Dailey and representatives from many local community organizations helped promote “Super Saturday,” held in a local mall where AARP volunteers helped file over 70 returns averaging \$1,900 in EIC refunds. Coalition members dressed up in football jerseys and hung balloons and football posters. A “tailgate party” was set up at the event where various organizations provided free services and information on IDAs, bank and credit union accounts, homebuyer programs, Medicaid and food stamps. Relocated Hurricane Katrina survivors were also provided information about assistance from FEMA, IRS and the Social Security Administration. *Contact: W.J. Monagle, Little Rock EITC Working! Coalition, (501) 399-3420, wmonagle@littlerock.org*

**3. Conduct outreach events and create opportunities to file tax returns.** Outreach Campaigns can coordinate free tax filing days for specific evenings or weekends. This is especially helpful for communities that have limited VITA sites and for organizations that are unable to operate a VITA site throughout the tax season. Check with the IRS Territory Manager in your area to see whether VITA volunteers may be available for the event or consider enlisting accounting students from a local college or members of the local Certified Public Accountants (CPA) Society.

#### **4. Expand and improve free tax filing sites.**

Community organizations that work directly with families earning low wages can help expand free tax filing assistance by hosting a VITA site. Community Action Agencies, schools, recreation centers, libraries, housing developments and public assistance offices make good locations for VITA sites. Communities that don’t have any VITA sites can also work with their IRS Territory Manager to establish them.

Providing electronic filing can improve VITA services. When tax returns are filed by computer, refunds generally come back more quickly. The IRS can provide the software needed for electronic filing. If VITA sites in your community do not have computers, local businesses that are upgrading their computers may be willing to donate the older models. Outreach Campaigns can also improve VITA services by making sure that sites are accessible for people with disabilities, by providing child care on site and by providing interpreters for tax filers who speak languages other than English. *For information about how to ensure VITA sites are accessible to people with disabilities, see p. 21 of this booklet.*

#### **5. Get in a position to enrich and sustain outreach efforts in the future.**

For tax credit outreach efforts to continue long-term, Outreach Campaigns need to identify diverse funding sources and campaign partners that can help outreach efforts become institutionalized. For example, credit unions, United Ways, volunteer centers and other nonprofits may be able to apply for public and private grants specifically for their organization. Other institutions such as local government agencies or the Chamber of Commerce may be able to contribute needed resources and services such as help photocopying or mailing outreach materials. *For more information on funding an Outreach Campaign, see p. 6 of this booklet.*

## Want to Start a Free Tax Filing Assistance Site? Let the Experts Help You!

The National Community Tax Coalition (NCTC) is a project of the Center for Economic Progress (CEP) in Chicago, one of the nation's largest free statewide tax preparation services for working families. NCTC brings together the expertise of community-based organizations from around the country that provide free tax preparation and conduct tax credit outreach. More than 300 organizations from over 40 states have participated in NCTC activities. NCTC offers affiliates trainings, conferences, technical assistance, a listserv to exchange information on best practices and new tax policies, and an advocacy network promoting the interests of low-income taxpayers. *For more information on NCTC visit [www.tax-coalition.org](http://www.tax-coalition.org) or contact: Jackie Lynn Coleman, Coordinator, NCTC, (312) 630-0261 or [jlcoleman@centerforprogress.org](mailto:jlcoleman@centerforprogress.org).*

## When do you run a Tax Credit Outreach Campaign?

**Early planning can contribute to the success of an Outreach Campaign.**

The earlier you are able to pull together organizations to become involved in outreach activities, the more prepared they will be to inform workers about the credits. Early planning is especially important if you are considering running a VITA site. It will take time to communicate with your Territory Manager and recruit and train volunteers to prepare taxes. Contact your Territory Manager as soon as possible to allow enough time for planning.

**Ongoing outreach is needed throughout the entire tax season.**

If tax season has already begun, and you are just learning about the need for outreach, there is still plenty you can do. The time is always right to inform workers about the tax credits, provide the proper tax forms and direct them to a place where they can get free tax filing help. In addition, after April 15, workers can still be informed about claiming refunds from prior years. *For more details, see p. 27 of the booklet, "Free Tax Help and Asset Development," in this kit.*

**Critical times for outreach**

**From mid-January through the beginning of February.** This is when most workers receive W-2 forms from their employers. Low-wage workers generally file early in the tax season to get their refunds as quickly as possible.

**Between March 15 and April 15,** when millions of workers still race to beat the tax filing deadline.

## How do you find funding for a Tax Credit Outreach Campaign?

**Explore a variety of funding sources.**

Outreach Campaigns can seek funding from private foundations or government grant programs. Community foundations, in particular, may have a special interest in an area's economic health. Civic or volunteer groups, corporations, local businesses or the United Way may be helpful in providing in-kind support. Government funds, such as federal community development block grants or special state outreach grants, may be available.

**Use available state and local data on EIC participation.** The Brookings Institution provides data on EIC claims by zip code for tax years 1997 through 2003 at [www.brookings.edu/urban/eic](http://www.brookings.edu/urban/eic). This information can help describe the need for outreach and help pinpoint where outreach efforts could be concentrated. *State-by-state EIC participation data are provided in the Outreach Campaign Tools envelope in this kit. Call the Center on Budget and Policy Priorities at (202) 408-1080 for assistance navigating the Brookings website.*

## How can the materials in this kit be used in your Tax Credit Outreach Campaign?

This kit can serve as an important resource to assist you in developing your outreach efforts. You can select from information presented in the three booklets included in this kit: “*Facts: About Tax Credits for Working Families*,” “*Outreach Strategies: Promoting Tax Credits for Working Families*,” and “*Free Tax Help and Asset Development: How to Help Families Keep All the Money They’ve Earned*,” and make copies for distribution during your outreach activities or use the information to create your own materials.

For example, the fact sheet on the EIC in the *Facts* booklet might be a helpful handout during a presentation to case managers. The fact sheet in the *Free Tax Help and Asset Development* booklet on how eligible workers who missed out on claiming the tax credits in the past can file back year claims might also be useful. If you are meeting with leaders in a rural community, you could copy the chapter, “Reach out to rural communities,” in this booklet which describes outreach strategies that may be helpful to consider in rural areas.

*The Outreach Campaign Tools Envelope* also contains a variety of materials to help you reach out and inform workers about tax credits and free tax filing assistance: **Posters, flyers and envelope stuffers in both English and Spanish** can be used to help you capture the attention of working families and individuals who may qualify for the EIC and the CTC. The posters and flyers include a space for you to provide local information, such as:

- the address, phone number and hours for the nearest VITA site; or
- the date, time and place of a community information session on tax credits for working families; or
- a toll-free hotline number to call for more information.

Additional outreach materials provided include:

- a checklist of documents workers should take to a VITA site when getting their taxes prepared;
- guidelines for selecting an honest commercial tax preparer if workers choose to do so; and
- sample EIC and CTC refund amounts at various income levels.

All the components of this kit are also available online at [www.cbpp.org/eic2007](http://www.cbpp.org/eic2007) along with flyers in 19 additional languages. The website provides links to other resources including IRS tax forms, an EIC refund estimator, EIC reports published by the Center on Budget and Policy Priorities, additional examples of Outreach Campaigns across the country and handouts identifying strategies for businesses, early childhood programs, job training programs, colleges and universities, housing groups and students to promote the tax credits and free tax filing assistance.

# Beyond the Basics: 13 Ways to Promote the Earned Income Credit and the Child Tax Credit

A successful Outreach Campaign reaches into every corner of the state, city or local community to find eligible workers and to develop creative ways to reach them. Following are 13 key strategies for building an effective Tax Credit Outreach Campaign.

## 1. Coordinate outreach with public benefit programs.

### Why is this important?

Many state and local government agencies that administer public benefits such as Medicaid, the State Children's Health Insurance Program (SCHIP), food stamps or subsidized child care, have ongoing contact with families and individuals who work and also receive public benefits. For example, 39.8 percent of food stamp recipients and a large share of families receiving subsidized child care are working families. Research suggests that about 50 percent of adults who receive TANF (cash assistance) benefits are either working or have worked in the past three months. Enlisting government agencies is an effective way to reach large numbers of eligible workers on a regular basis.

Some agencies and nonprofit groups conduct outreach activities to boost enrollment in specific public benefit programs. Organizations engaged in such outreach activities 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. Outreach Campaigns that follow a more holistic approach to helping families meet their needs will increase the chances that families obtain the broad range of work supports for which they qualify.

### How do you do it?

**Piggyback on regular mailings.** 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 rent notices, benefit checks, WIC coupons, program renewal notices, waiting list information or other mailings.

**Work with public agencies that reach out to families seeking public benefits.** Reach out to current and former recipients, as well as to applicants who have been denied benefits and to people on waiting lists. Agencies that deliver public benefits should let working families know that claiming the credits generally does not affect their eligibility for benefits such as food stamps, Medicaid or subsidized housing. *For more information on the treatment of tax credit refunds in determining public benefit eligibility, see p. 13 of the booklet, "Facts," in this kit.*

**Reach out to families experiencing employment changes.** As a result of businesses downsizing, merging and outsourcing jobs, families may be unemployed or they may have seen their earnings decline. Workers who previously earned too much to qualify for the EIC or the CTC may

**The agencies that administer the following programs are just some of those that can enhance a Tax Credit Outreach Campaign:**

Unemployment Compensation	Subsidized Child Care
Temporary Assistance for Needy Families (TANF)	Public Housing
Supplemental Nutrition Program for Women, Infants and Children (WIC)	Food Stamp Program
Low-Income Home Energy Assistance Program (LIHEAP)	Foster Care
General Assistance	Medicaid
Title 1 Education Assistance	Child Support Enforcement
State Children's Health Insurance Program (SCHIP)	Job Training Programs

now be eligible. Reach out to these workers through unemployment offices, job training programs and government assistance programs.

Since 1992, a law allows states to include an EIC notice with the 1099-G forms mailed each January to people who received unemployment compensation the previous year, as long as the notice does not increase the postage. Contact the unemployment office and offer to help develop this notice.

**Encourage programs for people making the transition from welfare to work to distribute information on tax credits.** Welfare-to-Work programs are administered by local Workforce Investment Boards which are required to secure contracts to provide job readiness, job placement and post-employment services to TANF recipients entering the labor force. Encourage local boards to require companies receiving such contracts to provide workers with information about the EIC and the CTC. Also, caseworkers focusing on helping applicants and recipients find jobs or enter job training programs can integrate tax credit outreach into their routine contacts with clients to help ensure successful transitions into the workforce.

**Encourage agencies to include tax credit information in resource materials.** Social services agencies can include information on tax credits in all resource books or materials provided to workers making the transition from welfare to work. For example, the Monmouth County, New Jersey Division of Social Services includes EIC information in its resource book, "On Your Own, But Not Alone," for all individuals leaving welfare. *Contact: Susan Rea, Monmouth County Division of Social Services, (732) 431-6170.*

**Enlist eligibility workers.** Outreach workers that focus on assisting families in obtaining a specific benefit often find that their clients have multiple needs. Workers frequently come into contact with families that may be eligible for the tax credits but may not know about them. Help eligibility workers understand the EIC and CTC and the importance of free tax filing assistance so they can share this information with families applying for public benefits.



The Community Action Partnership of Orange County (CAPOC) and the Orange County Social Service Agency (OCSSA) in Garden Grove, California partner in running the “Food Stamps in 4 Hours” project. Each month, staff from both agencies conduct workshops at three locations to help applicants enroll in the Food Stamp Program in one day. Workshop participants complete an application, view an orientation video and are interviewed by a county eligibility staffer. Since transportation is often a barrier preventing people from applying for food stamps, CAPOC and OCSSA use a bus donated by the Orange County Transit Authority to provide transportation to workshop participants. CAPOC and OCSSA also help workshop participants file tax returns and claim EIC refunds. Trained staff complete paper tax returns on the bus rides to and from the workshop sites using a table set up to provide privacy. Once staff returns to the workshop site, tax return information is transferred to a computer to file the returns electronically. CAPOC estimates that the “Food Stamps in 4 Hours” workshop assists over 500 people throughout the year. *Contact: Jerry Sanders, CAPOC, (714) 897-6670 x 3610, jsanders@capoc.org*

**Invite outreach workers who promote a variety of programs to participate in tax credit outreach events and to be on hand at tax assistance sites.** Organizations that assist families in applying for health coverage, food assistance or child care are apt to be looking for settings to reach families that are eligible for such benefits. Chances are they would welcome the opportunity to participate in tax credit outreach events or set up a table in or near a local VITA site. This can help establish an ongoing relationship.

## Tips for Offering Help with Public Benefit Programs at a VITA Site

Market programs offered at the VITA site as a “package of supports for working families.” In addition to the tax credits, programs such as health insurance, food stamps and child care provide support to working families. It is helpful to emphasize that together these programs form a comprehensive package of financial assistance.

Let people know in advance what services will be available at the VITA site. Workers go to VITA sites anticipating that they will get help with their tax returns. They may be unprepared to talk about other help they need or may be unable to complete applications for other benefits if they are missing key documents. A “heads up” about what to expect and what to bring along is very helpful.

Create a setting that helps families feel comfortable applying for an array of benefits. Staff of community organizations who are trained to help families complete application forms are often in the best position to help. Tax filers may feel insecure having government agency representatives present at VITA sites. Make it clear that information from a worker’s tax return will not be shared with the people on hand helping with applications for public benefit programs. It also is useful to clarify that getting the EIC or the CTC generally will not affect eligibility for benefits such as food stamps, subsidized housing, Medicaid and SCHIP.

Consider using a questionnaire to identify other benefits that families would be interested in receiving — and follow up. If it is not feasible to provide application assistance at the VITA site, a brief survey of tax filers can identify whether they are interested in obtaining benefits, such as health insurance and food stamps. It is important to follow up later by providing interested families more information and giving them the opportunity to apply for benefits they need and want.

**Include information about tax credits in electronic benefit screening programs.** Several states and community-based organizations have developed electronic programs which screen families for benefits including Medicaid, SCHIP, LIHEAP (energy assistance) and WIC. Work with program designers to incorporate information about tax credits and free tax filing assistance. One benefit screener called RealBenefits, developed by Community Catalyst in Boston, can be tailored for any state to screen families for EIC eligibility and to indicate how large a refund they may be able to get. *Contact: Enrique Balaguer, Community Catalyst, (617) 275-2804.*

## 2. Involve businesses and employers.

### Why is this important?

Since the EIC and the CTC are tax benefits for people who work, employers are a logical and important partner in any campaign. Remember, businesses have both employees and customers who could be eligible for the tax credits. Keep in mind that the government is a large employer in most states and localities. Government employees often earn modest wages and may be eligible for the tax credits. In the course of their work, government employees may also have contact with potential EIC and CTC claimants and can be an important source of information about the credit.

### How do you do it?

**Convince local businesses to become involved in outreach efforts.** To interest local businesses in tax credit outreach, stress the reasons they have a stake in boosting EIC and CTC participation such as:

- The EIC and the CTC helps supplement employees' wages.

- Since the tax credits help workers take care of day-to-day needs, they can help them keep their jobs and promote a more stable workforce.
- EIC and CTC refunds help customers pay bills.
- The tax credits bring federal dollars into local communities.
- Publicizing the EIC and the CTC can increase the company's visibility in the community.

**Enlist a business organization to deliver the message.** 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.



The Orlando Regional Chamber of Commerce coordinates *Extra Credit Orlando*, a business-led Outreach Campaign that promotes the EIC and free tax filing assistance sites in Central Florida. "Refund Roundup" sessions are scheduled for one hour over breakfast or lunch to train employers, businesses and organizations, so they can educate their employees and members about the tax credit and free tax filing assistance. Some of the businesses that now promote the tax credits include Disney, the Central Florida Educators Credit Union, the Hotel and Lodging Association, 7-11, hospitals and airports. *Extra Credit Orlando* also provides employers a website, electronic newsletter articles and letters of endorsement, envelope stuffers for employee mailings and posters to display at their workplace. In 2006, the second year of the campaign, the Chamber held 118 "Refund Roundup" sessions reaching 1,159 employers who have approximately 668,000 employees. The campaign's 27 VITA sites helped workers obtain \$1.8 million in EIC refunds. *Contact: Maria Urbino, Orlando Regional Chamber of Commerce, (407) 835-2442, maria.urbino@orlando.org*

**Persuade local businesses to inform their customers.** Stores can display posters and distribute flyers to customers. 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 insert EIC and CTC information with monthly bills.

**Persuade employers to incorporate information on the EIC and the CTC into their routine communications with employees:**

- **Send tax credit information to all employees.** Employers can include an envelope stuffer or brochure with workers' W-2 forms. Tax credit information can also be sent with employee paychecks in December, January, February and March. For example, in 2006, Dairy Queen Corporate Stores printed a tagline about tax credits on paychecks sent to approximately 2,000 workers at its restaurants in Kentucky and Indiana.
- **Display tax credit information in prominent places at the worksite.** Hang posters and provide flyers near the time clock, the employee lounge or office waiting rooms. Publish an article about the tax credits in employee newsletters. One large government employer programmed office computers to run 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.
- **Promote Advance EIC payments.** Employers can inform workers about the Advance EIC payment option and make it easy for them to

obtain and complete IRS Form W-5 to start Advance EIC payments.

To encourage employers to promote the Advance EIC to their employees, provide them the Form W-5, along with the IRS payroll instructions for handling Advance EIC payments. The instructions are contained in the Advance EIC chapter of IRS Publication 15, Circular E, Employer's Tax Guide. The Employer's Tax Guide also contains Advance EIC tables employers can use to easily determine the amount to add to an employee's paycheck. *Outreach partners and employers can order free copies of the Employer's Tax Guide and the Form W-5 for 2007 from the IRS by calling 1-800-TAX-FORM, or they can be downloaded from the IRS website at [www.irs.gov/formspubs](http://www.irs.gov/formspubs).*

- **Train managers to deliver information about the EIC and the CTC to employees they supervise and to new hires.** Make employee education about the tax credits part of a supervisor's responsibilities. 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. To obtain VITA lists or arrange for volunteers to visit the worksite, employers can contact the IRS Territory Manager in their area. *For contact information, see p. 30 of the booklet, "Free Tax Help and Asset Development," in this kit.*

### 3. Partner with schools.

#### Why is this important?

Outreach Campaigns can reach families that may qualify for the tax credits through schools in which children from low-income families are enrolled.

School officials are generally viewed as trustworthy members of the community. When information comes from the school, parents are likely to take notice. School administrators know that a secure home environment promotes school achievement, and many have recognized the value of the EIC and the CTC in contributing to family stability.

### How do you do it?

#### Try these channels for distributing information to families:

- **Schools in which many students are eligible for free or reduced-price meals.** Many families with children who receive free or reduced-price school lunches will qualify for the EIC and the CTC. The state Department of Education can tell you which school districts have large numbers of eligible students. Enlist district superintendents or individual school principals in outreach efforts. Information can be distributed to families along with notices of eligibility for school meals or with other materials such as school newsletters, report cards and lunch menus.
- **Title 1 programs.** Because they serve economically disadvantaged elementary school children, Title 1 programs and their parent advisory committees are good places to reach low-income workers. The state Department of Education can help you locate Title 1 schools.
- **Parent Teacher Associations.** PTAs can be instrumental in educating families about tax credits for low-wage workers. Ask your local PTA to provide information on the EIC and the CTC to all local PTA presidents and to 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.
- **General Education Diploma (GED) programs.** Many GED participants are likely to be eligible for the EIC and the CTC. Ask administrators to provide tax credit information to GED classes and to send information with GED certificates. *For local GED contacts, call the American Council on Education hotline at 1-800-62-MYGED or visit [www.gedtest.org](http://www.gedtest.org).*
- **School counselors.** School counselors frequently come into contact with families in financial crisis. Make sure they know about the EIC and the CTC and where families can get free tax assistance. *For a state directory of school counseling associations, visit the American School Counselors Association (ASCA) website at [www.schoolcounselor.org](http://www.schoolcounselor.org) or call ASCA at (703) 683-2722.*
- **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.



Tax Help New Mexico (THNM) is a statewide coalition of 20 nonprofit partners and 12 community colleges and universities. THNM created a web-based training module to help schools offer tax law courses so that students can learn how to prepare tax returns. Upon completion of the class, students are required to volunteer as tax preparers at their school's VITA sites to receive course credit. In 2006, over 300 students and community volunteers helped over 26,500 tax filers claim more than \$21 million in federal and state refunds through 41 VITA sites in 23 cities. *Contact: Diana Matier, THNM, (505) 224-5242, [dmatier@cnm.edu](mailto:dmatier@cnm.edu)*

- **Community colleges and technical schools.** Workers who have returned to school to improve their job skills and are working part-time or at low wages may be eligible for the EIC and the CTC. Others who are taking non-credit courses to learn about personal finance issues, such as homeownership, may also be eligible. In addition, full-time students up to 24 years of age can be qualifying children for the EIC. Encourage community colleges to send students and their parents information about the tax credits along with tuition bills or financial aid forms. While an EIC refund is counted as part of family income in determining eligibility for financial aid, the amount of the EIC generally will not bring the family income above the limit for qualifying for financial aid. Thus, families can receive an EIC refund without jeopardizing college financial aid.

## 4. Coordinate with emergency response efforts.

### Why is this important?

The severe needs of communities hit by the devastating hurricanes in the Gulf Coast during 2005 drew attention to how important it is to ramp up tax credit outreach efforts following a natural disaster. After an emergency such as a hurricane, tornado, earthquake, blizzard, flood or fire, survivors are confronted with a wide range of pressing concerns, including property loss or damage to a home, power outages and separation from family members. Loss of income due to temporary or permanent business closures, displacement or injuries may cause additional economic strain for families. For many, finding the money to address multiple needs will be a challenge. Even a few weeks without pay can reduce a previously well-paid worker's income enough to become eligible to claim the tax credits. Refunds from the EIC and CTC can provide workers vital financial assistance

needed to help them reestablish themselves and care for their families as they recover from the crisis.

Months after a disaster, many families may still be in the process of restoring their lives. Outreach efforts are needed to remind taxpayers that tax refunds can provide a much-needed financial boost and to let them know about free tax filing services that can help them file a return without the added burden of fees charged by commercial tax preparers. They also need to know that help is available if they have lost documents needed to file a tax return. In the case of the Gulf Coast hurricanes, special tax law provisions were implemented to assist workers hurt by the disaster. In such cases, outreach efforts are needed to let people know about specific policies enacted to ease the impact of the disaster.

### How do you do it?

**Reach out to social service organizations that are standing ready to provide emergency help.** Food pantries, shelters, United Ways and Community Action Agencies offer assistance to families year-round. Since many of these organizations include emergency response efforts as part of their mission, they are likely to provide some form of aid — whether it is clothing, food, housing assistance or counseling — following a disaster. Provide these groups with information about the tax credits and free tax filing assistance so they can inform new and existing clients.

Also contact crisis centers and disaster recovery programs, such as those set up in affected communities by the American Red Cross, to make sure they are familiar with how tax credits and free tax filing assistance can benefit their clients. These emergency services may be the primary sources of assistance for many families and the only way some may hear about helpful tax information.

At the same time Tax Credit Outreach Campaigns are helping existing emergency services providers to incorporate tax credit outreach into their work, they should consider ways they can expand their focus to be most effective during an emergency. For example, it will be helpful for Tax Credit Outreach Campaigns to be able to link families seeking tax filing assistance to places they can get help with other needs, such as food or health care.

**Organize a special event to address the tax concerns of those affected by an emergency.**

Free tax assistance programs can partner with agencies providing emergency assistance to organize a special event to offer families assistance with emergency-related tax concerns. Make sure one or more individuals trained in any tax law changes or IRS procedures designed to address emergency issues are available to assist taxpayers. These specialists can be either IRS staff or volunteers. If it is difficult to find volunteers to train, tax professionals may be willing to assist with complex tax issues. For example, several national tax professional organizations, such as the American Institute of Certified Public Accountants (AICPA), enlisted their members to provide assistance to survivors of the hurricanes that struck in 2005.

Identify a central location (near public transportation if available) to hold the event. If people were forced to relocate as a result of the disaster, consider arranging a special event in an area where people are temporarily living. For example, after the 2005 hurricanes, the Houston Asset Building Coalition partnered with the IRS and several other agencies to organize a special tax filing event in Houston where 150,000 to 250,000 individuals had relocated.

In addition to offering tax assistance, special events can also provide other services that can benefit taxpayers that have experienced a disaster. Reach out to job programs, crisis centers, counseling services and public benefits offices to enlist their

participation in the event. Also, contact business chains such as grocery stores, drug stores, department stores and restaurants to ask them to donate gift cards. These can assist persons attending the event or serve as a “thank you” for volunteers who may also be affected by the emergency.

**Collaborate with the IRS.** The IRS can provide an enhanced level of support following an emergency. Your IRS Territory Manager is the best first contact to identify how the IRS can help.

*Contact information for Territory Managers is on p. 30 of the booklet, “Free Tax Help and Asset Development,” in this kit. Ask for IRS Publication 2194 “Disaster Losses Kit for Individuals,” — an important resource that includes instructions and forms that taxpayers may need to request transcripts of tax returns or to change their address. There is also a version of the kit for businesses. (These kits are also available online at [www.irs.gov](http://www.irs.gov).)*

The IRS also can help taxpayers obtain copies of documents needed to file tax returns, such as a birth certificate, driver’s license, Social Security card or ITIN letter that may have been lost or destroyed. These documents are often required to receive other forms of assistance, as well. Documentation of earnings such as W-2 forms or pay stubs is also needed to file a tax return. The IRS can help reconstruct such records so that people can file their tax returns and link to other forms of assistance.

After the 2005 hurricanes, the IRS provided special training in Texas to help volunteers understand the emotional and physical stresses that hurricane survivors may experience and to learn special interviewing skills to ensure they could identify and address the taxpayer’s full range of needs. The training also prepared volunteers to complete emergency-related tax forms. It was important for at least one volunteer with this training to be present at free tax preparation assistance sites.

**Arrange to offer assistance with taxes after the April filing deadline.** It may be especially difficult for individuals hurt in a disaster to file their taxes on time if they are dealing with family crises. Others may have filed their taxes prior to the April 15 deadline, but later learn of special provisions that they didn't take advantage of and need to amend their tax return. The IRS may extend the filing deadline for survivors of disasters, giving everyone more time to attend to their tax filing responsibilities. Thus, offering extended tax filing assistance can be a valuable service. Be sure to notify your IRS Territory Manager if organizations are offering extended free tax preparation so when people call the IRS toll-free phone number seeking help the operators can direct them to the right place.

**Verify emergency response plans.** Find out if local free tax filing assistance organizations have identified steps to reach out to low-income workers affected by a disaster. If there is not a plan in place, help them create one. While it is difficult to “get ready” for an emergency, it's helpful to begin to prepare by establishing a “chain of command” to communicate with employees and volunteer tax preparers and identify an alternative location to conduct free tax filing assistance. For example, when the Biloxi EITC Coalition in Gulfport, Mississippi, was hit by Hurricane Katrina, five of the Coalition's tax sites were damaged or flooded. Two of the sites were damaged beyond repair and one site did not have enough returning employees to run it. Determined to assist low-income taxpayers, the Coalition worked to repair one site and relocate the remaining site. Despite these challenges, the Coalition still completed more tax returns than it had the previous year.

Tax Credit Outreach Campaigns should also inquire about the emergency response plans of financial institutions and other tax credit outreach partners to find out what provisions are in place



After the 2005 hurricanes devastated New Orleans and the Gulf Coast, Foundation Communities in Austin, Texas, made special efforts to reach out to the more than 5,000 survivors who were relocated there. Two of its six Community Tax Centers were devoted to serving hurricane survivors once a week from February to April. The IRS held a special session to train approximately 40 volunteers to file tax returns for the survivors and on how to complete casualty loss forms. The IRS Taxpayer Advocate Office assisted with expediting the filing of tax returns for hurricane survivors so that they could be processed within a week, sometimes as fast as 24 hours. In addition to filing federal returns, Foundation Communities prepared Louisiana state returns and completed prior year returns. Foundation Communities also conducted presentations to case managers working with relocated clients to explain to them the extended tax-filing deadline for hurricane survivors and special Louisiana tax provisions. After April, case managers were encouraged to refer clients to the Community Tax Center that is open year-round. As of October 2006, Foundation Communities has helped over 150 survivors claim approximately \$250,000 in federal refunds for 2005 and prior years. *Contact: Elizabeth Colvin, Foundations Communities, (512) 447-2026 x 11, Elizabeth.Colvin@foundcom.org*

that can assist workers after a disaster. For example, under a disaster relief plan the institution may grant “grace periods” for payments owed to banks, mortgage companies or landlords and can waive fees for missed or late monthly payments. Encourage taxpayers to contact their utility and credit card companies, rental office, mortgage company or bank to inform them of their circumstances. Communicating with these

companies is especially important if they are not located in the area affected by the emergency, since they may not be aware of the problems local families are experiencing.



In response to hurricanes Katrina, Rita and Wilma in 2005, Washington Mutual Bank's disaster relief program offered numerous services for customers such as: quick approval on personal lines of credit, alternative payment plans for loan customers including an automatic 90-day payment extension, penalty-free withdrawals from certificates of deposit and waived fees for using other companies' ATM machines for customers who were relocated to cities without Washington Mutual branches. Headquartered in Seattle, Washington Mutual also provided post-hurricane support by issuing corporate grants to local relief agencies and the American Red Cross; encouraging customers to donate to the Red Cross at Washington Mutual financial institutions or through the Bank's website and organizing more than 1,500 employees to participate in a national telethon to garner additional pledges. These activities combined provided more than \$3.5 million for hurricane relief efforts. *Contact: Elaine Sells, Washington Mutual, (206) 377-5838*

## 5. Reach out to people who speak languages other than English — including immigrants.

### Why is this important?

According to the 2000 Census, nearly 47 million people — about one in five U.S. residents — reported speaking a language other than English regularly at home. Workers who do not speak

English often earn low incomes but may not understand that they can qualify for the EIC and the CTC. It is especially important for outreach messages to highlight that immigrants who are legally authorized to work and have Social Security numbers may be eligible for the EIC and the CTC. Tax Credit Outreach Campaigns that are conducted only in English will miss large groups of eligible workers who can greatly benefit from this information and assistance. *To obtain additional information about the importance of the EIC for Hispanic families, see p. 38 of this booklet.*

### How do you do it?

**Use bilingual outreach materials.** This kit includes flyers, posters and envelope stuffers in English and Spanish. *Outreach flyers in 19 additional languages may be obtained by contacting the Center on Budget and Policy Priorities at (202) 408-1080, via e-mail at [eickit@cbpp.org](mailto:eickit@cbpp.org) or from our website: [www.cbpp.org/eic2007](http://www.cbpp.org/eic2007).* In addition to distributing written material, bilingual staff or volunteers have an opportunity to explain the tax credits and other financial information and answer questions during presentations or individual conversations. Consumer Action, a national nonprofit education and advocacy organization, offers materials in Spanish, Chinese, Korean, Vietnamese, and Russian on topics such as money management, savings and asset development which are often promoted with the EIC and CTC. *To download these resources visit [www.consumer-action.org/publications](http://www.consumer-action.org/publications).*

### Emphasize immigrant workers may qualify.

Immigrant workers may be reluctant to file for tax benefits for many reasons. They may have trouble understanding complex tax rules or they might have been denied other public benefits in the past, such as food stamps or Medicaid, and might assume they also are ineligible for tax benefits.

Immigrants also may incorrectly believe that claiming tax benefits could jeopardize their immigration status or their future ability to become a citizen. These issues and concerns can be addressed in outreach presentations in immigrant communities to calm fears that claiming tax credits will result in being labeled a “public charge.” At the same time, outreach materials should explain that immigrant workers need a Social Security number to claim the EIC, so that they are clear about the eligibility requirements before they file. *For information on issues related to EIC eligibility for immigrant workers, see p. 16 of the booklet, “Facts,” in this kit.*

Immigrant workers may qualify for the CTC if they earned more than \$11,300 in 2006 and raised a qualifying child under age 17. The child must be a U.S. citizen or a resident alien who lives in the United States. The CTC can be claimed using either a Social Security number (SSN) or an Individual Taxpayer Identification Number (ITIN). Some immigrant workers may be able to claim the CTC even if they are not eligible to claim the EIC. *For more information on ITINs, see p. 28 of the booklet, “Free Tax Help and Asset Development,” in this kit.*

**Reach out to organizations that provide services to immigrant workers.** 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, call the Southeast Asia Resource Action Center at (202) 667-4690 or visit [www.searac.org](http://www.searac.org).*

**Partner with organizations that are likely to have bilingual and bicultural staff.** Disseminate information about the EIC and the CTC through educational, recreational and social programs sponsored by churches, mosques or synagogues. Encourage schools to provide bilingual take-home notices and to post bilingual material about the tax credits in the schools. Many state education agencies have 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 opportunities to talk with workers who may qualify for tax credits.

**Enlist businesses that cater to immigrant communities.** Popular businesses, such as ethnic grocery stores or restaurants, barber shops or nail salons, may also be important places to display posters and flyers.

**Promote multi-lingual free tax help in the community.** Like other low-wage workers, immigrant workers and workers who do not speak English give up precious resources when they pay a commercial tax preparer to file their tax returns. They may be especially vulnerable to ill-trained or dishonest commercial preparers who speak their language and take advantage of that connection. Encourage trusted institutions in the community to establish VITA sites. Recruit VITA volunteers from the community or from the foreign language department of a university who can speak the language of the workers seeking assistance. When advertising VITA sites, indicate which sites provide services in languages other than English. For VITA sites that schedule appointments, ask about language needs when appointments are being made. Local VITA lists provided by the IRS include such information. *To get a local VITA list contact the IRS Territory Manager for your area. See p. 30 of the booklet, “Free Tax Help and Asset Development,” in this kit.*



The International Institute in Saint Louis, Missouri, is the state's largest refugee resettlement agency and provides comprehensive resettlement services including case management, employment, mental health counseling and youth and elderly services. A member of the Gateway EITC Community Coalition, the Institute informs program participants about the benefits of claiming the EIC and CTC and how to access free tax filing services. Institute staff provides interpretation services in Spanish, Arabic, Vietnamese, Russian, Somali, Bosnian, Amharic and Farsi/Dari. The Institute produced and distributes a brochure translated into the same eight languages that explains why workers in the U.S. are required to pay taxes and why Refund Anticipation Loans (RALs) are a poor choice when it comes time to file tax returns. The Institute hosts a free tax preparation service, enlisting AARP volunteers during business hours and Coalition volunteers on scheduled evenings to prepare tax returns. In 2006, the Institute assisted nearly 200 taxpayers to file returns totaling \$100,000 in refunds. They inform clients about the free tax preparation services by mailing letters to recent arrivals, by notifying case workers and employment services and by discussing the services with students in the Institute's English and financial education classes. *Contact: Linda Callanan, (314) 773-9090 x 131, callananl@iistl.org*

**Tap into non-English media.** Many non-English-speaking communities have their own radio and television programs, as well as magazines and newspapers. Encourage news coverage, run ads, write articles or develop public service announcements on the EIC and the CTC. Find out the best times for announcements to be broadcast to non-English speakers. For example, migrant farm workers may listen to the radio in the pre-dawn hours before beginning work in the

fields. For more information on involving Spanish language media, contact Walkiria Pool with the Economic Mobility Project, National Council of La Raza at (202) 785-1670. To search for other non-English media by language or ethnicity visit New America Media's website at [news.newamericamedia.org/directory](http://news.newamericamedia.org/directory). (Note: Membership is required to access some features.)

## 6. Inform workers with disabilities and families raising children with disabilities.

### Why is this important?

Low-wage workers with disabilities and families that are raising children with disabilities are apt to face profound challenges as they strive to care for their families and stay employed. 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 may provide can be vital.

In the National Organization on Disability/Harris "Survey of Americans with Disabilities" released in June 2004, 26 percent of people with disabilities reported annual household income of \$15,000 or less. In addition, 83 percent of people with disabilities said they had never claimed an income tax credit or deduction related to their employment or disability. It is very likely that such families and individuals may not know about the EIC and the CTC and how to claim them.

In addition, they may not realize that special rules may help them qualify if they work and have a disability or are raising a child with a disability. For example, a "qualifying child" for the EIC generally must be under age 19 or under age 24 if a full-time

student, but a child who has a permanent and total disability can be any age and still be considered a qualifying child for EIC purposes. It also is critical for people with disabilities to understand how claiming the tax credits may affect other public benefits they depend on. Thus, outreach efforts providing this group clear, accurate information about the EIC and CTC and how to claim them is extremely important. *For information on tax credit eligibility for such families and individuals, see p. 11 of the booklet, “Facts,” in this kit.*

### How do you do it?

**Enlist state or local affiliates of national groups that advocate for people with disabilities.** State and local organizations may publish newsletters, sponsor conferences and conduct training sessions, all of which can be effective avenues for getting information about tax credits and free tax filing assistance directly to workers who may be eligible. The Consortium for Citizens with Disabilities (CCD), a coalition of approximately 100 national disability organizations, can help link you to state and local contacts who may be eager to become involved in Tax Credit Outreach Campaign activities. 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](http://www.c-c-d.org).* You also may find potential partners by contacting other national organizations with state members that may not be on the CCD website, such as the National Council on Independent Living. *For more information, visit [www.ncil.org](http://www.ncil.org).*

**Encourage “Disability Program Navigators” to incorporate outreach on the EIC and CTC 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 (SSA) which aims to assist people with disabilities in meeting the challenges of finding work and maintaining employment. As of August 2006, the program has awarded grants to 31 states in which SSA is undertaking employment support initiatives. Approximately 260 Disability Program Navigators (DPNs) have been hired to help people better understand work support programs and other services available through DOL One-Stop Career Centers. Provide DPNs and One-Stop Career Centers in your state with the information and outreach materials they need to promote the tax credits and guide people on how to claim them. *To find out more about the program visit [www.doleta.gov/disability/new\\_dpn\\_grants.cfm](http://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](http://www.doleta.gov/usworkforce/onestop/onestopmap.cfm).*

**Reach out to your state’s Benefits Planning, Assistance and Outreach (BPAO) Program.** SSA funds community-based BPAO programs in every state to help SSA beneficiaries with disabilities make informed choices about work. Through this program, benefits specialists provide work incentives planning and assistance to SSA beneficiaries with disabilities. Ensure that benefits specialists have the information they need to alert people to the credits and how to claim them. *For a directory of BPAO programs across the country, visit [www.socialsecurity.gov/work/ServiceProviders/BPAODirectory.html](http://www.socialsecurity.gov/work/ServiceProviders/BPAODirectory.html).*

**Help state and local government agencies engage in tax credit outreach activities.** 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. Additionally, many Mayors’ offices have commissions that

accommodate the needs of community members with disabilities. Contact your Mayor's office to find out what resources are available to assist people with disabilities.

It is important for basic materials to explain special rules that may help workers with disabilities to qualify for the credits. *For more information, see p. 11 of the booklet, "Facts," in this kit.* In addition to providing information, state agencies and private organizations may be able to participate in free tax filing assistance activities. Identify organizations with accessible facilities and urge them to host free tax filing sites.

**Take steps to ensure that free tax assistance sites are accessible to people with disabilities.** For people with disabilities to take full advantage of



The United Way of Palm Beach County (UWPBC) worked with the TaxFacts+ Campaign to identify ways to increase awareness of tax benefits and use of free tax filing services among people with disabilities. UWPBC coordinates 41 VITA sites through the county's local Tax Credit Outreach Campaign, including three that are located at organizations serving people with disabilities. Partners were encouraged to take ownership of the outreach effort within their organization and reach out to workers with disabilities by including information about the tax credits and VITA sites in newsletters and promoting the EIC and CTC among employees. One partner, Goodwill Industries, provided funding to support sign language interpretation for clients at any VITA site. After one year, the number of tax returns filed at the three VITA sites specifically serving persons with disabilities nearly doubled and returned \$1.5 million in total refunds to residents. *Contact: Carter Elliott, UWPBC, (561) 375-6686, carterelliott@unitedwaypb.org*

free tax filing assistance, accessibility to sites and services is essential. Until existing sites can be modified, a mobile tax assistance site or home visiting program may be good alternatives. A variety of factors need to be considered before directing people with disabilities to any particular site to get help. The TaxFacts+ Campaign, in collaboration with regional Disability and Business Technical Assistance Centers (DBTACs), has compiled a

## Join the TaxFacts+ Campaign.

The TaxFacts+ Campaign is designed to help people with disabilities expand their knowledge and utilization of tax benefits, financial education and asset building services. Coordinated by the National Disability Institute (NDI), NCB Capital Impact and the IRS/SPEC division, TaxFacts+ has developed education and outreach materials geared toward the interests and skills of people with disabilities and is working with existing free tax assistance sites to build their capacity to serve workers with disabilities and their families. NCB and the IRS have developed a TaxFacts+/SPEC Disability Toolkit that outlines important steps for organizing an outreach initiative that targets persons with disabilities. *Contact Richard Keeling, Richard.Keeling@irs.gov for more information about the toolkit.*

In 2006, 30 cities focusing on EIC outreach prepared nearly 17,000 tax returns for people with disabilities at free tax filing sites — more than double the number of returns filed the previous year. In 2007, TaxFacts+ will work in 54 cities. TaxFacts+ has published a report detailing a recent survey of results of the campaign in four cities. *For a copy of the report, visit [www.ncbcapitalimpact.com/documents/ndi/ford\\_report.doc](http://www.ncbcapitalimpact.com/documents/ndi/ford_report.doc). For further information about the TaxFacts+ Campaign contact: Johnette Hartnett, [jhartnett@ndi-inc.org](mailto:jhartnett@ndi-inc.org)*

detailed checklist of accessibility factors to assess whether tax assistance sites are suitable for use by people with physical, visual, auditory, and cognitive disabilities.

For example: Is carpeting low pile and firmly attached along the edges? Are signs and written materials designed for people with low vision? Are assistive listening devices and a telecommunications device (TDD) phone system available? Are sign language interpreters available? If a VITA site is unable to fulfill these accessibility factors for the entire tax season, consider hosting targeted tax preparation assistance days. For example, a VITA site can host a tax day for the hearing impaired when sign language interpreters are present. *For more information and technical assistance related to the Americans with Disabilities Act and accessible information technology, contact your regional DBTAC, funded by the U.S Department of Education. DBTACs can be reached by calling 1-800-949-4232 (V/TTY) or visit [www.adata.org](http://www.adata.org).*

## 7. Target special outreach efforts to workers not living with children.

### Why is this important?

Tax credits can represent a useful income boost for low-wage workers who do not have children living with them. Many of these workers — including non-custodial parents and childless workers — may not realize they could qualify for one or both of these credits. Workers whose earnings are particularly low may not be required to file a tax return. Thus, there is the added danger they may miss out on the EIC and CTC, since a tax return must be filed to claim the credits.

While only a small EIC is available to very low-income workers who do not have children living

with them (averaging about \$230), non-custodial parents may be able to claim a more 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 \$11,300 in 2006. It is important to bring this news to workers who may know that they do not qualify for the EIC because their children do not live with them, but who may not understand that the divorce or separation agreement may enable them to claim the CTC. *For more information, see p. 8 of the booklet, “Facts,” in this kit and p. 24 in this booklet.*

Low-income workers not raising children in their home may be concerned that if they receive a tax credit refund they could lose other benefits such as SSI, Medicaid or food stamps. Clarifying the rules to overcome such fears is another key element of successful outreach. *For more information about this issue, see p. 13 of the booklet, “Facts,” in this kit.*

### How do you do it?

Finding low-income workers not raising children in their homes who may be eligible for the EIC or the CTC can be especially challenging. 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. Targeted efforts are needed to reach these workers to encourage them to claim the EIC and to be sure they know they may be eligible to claim the CTC for children they are permitted to claim as dependents.

Remember that workers whose earnings are too small to pay federal income taxes do not have to file their tax returns by the April 15 deadline. Outreach to these workers is relevant all year long.

**Target workers who may be working sporadically.** To have incomes to qualify for the EIC for workers not raising children, workers are likely to have been employed on and off during the year. Try distributing materials at:

- Pick-up and drop-off spots for day labor
- National and regional hotel, motel and other service industry chains that may hire seasonal employees
- Check-cashing outlets and convenience stores
- General Assistance, food stamp or unemployment offices
- Programs serving migrant workers

**Target individuals whose circumstances have impeded their efforts to work.** Some of these workers may have disabilities or may have been in circumstances that have prevented them from holding full-time or higher-paying jobs. 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
- Literacy or GED programs
- Programs providing home-based care, such as to workers with serious illnesses

**Target workers in school or training programs.** Try distributing materials at:

- Universities with non-traditional students
- Community colleges



In 2006, the Ohio Empowerment Coalition partnered with students from Thomas More College near Cincinnati to coordinate six Tax Days to help people file their tax returns for free. The students completed tax returns for approximately 30 people, nearly half of which were workers without children. The Coalition worked closely with one of its neighbors, the Drop Inn Center, the city's largest shelter for single adults without children. The shelter posted flyers in its building and announced the Tax Days during staff meetings so staff could inform residents. The Coalition included information in its newsletter and email action alerts and had flyers available for people visiting the office. Since the Coalition is located on a main street, it also displayed information in its windows that was visible from buses. *Contact: Lynn Williams, Contact Center, Ohio Empowerment Coalition, (513) 381-4242, lwilliams@zoomtown.com*

- English as a Second Language or literacy programs
- Vocational rehabilitation centers
- Job training programs

**Direct workers to places they can get free tax filing help.** Workers not raising children may not be familiar with how to file a tax return and even though they can use the simpler 1040EZ to get the EIC, the process may still seem daunting. **Note:** Non-custodial parents eligible to claim the CTC may not use the 1040EZ; they must use the 1040 or 1040A and attach Form 8332, "Release of Claim for Child of Divorced or Separated Parents," and Form 8812 to claim the CTC.

## A Special Message on the Child Tax Credit

The Child Tax Credit (CTC) presents an important opportunity for some low-income workers whose children do not live with them. A non-custodial parent who earned more than \$11,300 in 2006 may be eligible for a CTC of up to \$1,000 per qualifying child under age 17. Outreach messages that target this group of parents and highlight the CTC are critical.

### Why are special outreach efforts needed?

To claim the CTC, a worker must live in the same home as the qualifying child claimed on his or her tax return. However, there is an exception: when a non-custodial parent is permitted by a divorce or separation agreement to claim a child as a dependent, that parent is entitled to claim the child for the CTC — a tax refund that can relieve some of the financial pressures non-custodial parents face along with so many other struggling families. (In this case, the custodial parent must sign IRS Form 8332, “Release of Claim for Child of Divorced or Separated Parents,” and the form must be attached to the tax return of the non-custodial parent.) This exception does not apply to claims for the EIC. Thus, most non-custodial parents are ineligible for the EIC, unless their incomes are low enough to claim the small EIC for workers not raising children.

### Outreach Ideas

**Enlist the Child Support Enforcement Agency.** The state or county Child Support Enforcement agency (also referred to as the IV-D agency) 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 CTC. Hospitals often provide brochures and other materials issued by the IV-D agency to unmarried parents when a new baby is born. These materials can include information about both the EIC and the CTC.

**Provide tax credit information when child support obligations are being established.** Child support obligations are generally established through either 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. Families should be informed about the CTC and how to claim it before the obligation is established, since the credit may make it easier for parents to reach an amicable agreement on child support. Information about the credit could 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.** Employers can inform their workers about both the EIC and the CTC by posting materials in employee break rooms and by distributing information in employee paychecks. A special note about the availability of the CTC may be of particular interest to non-custodial parents whose child support payments may be deducted from their paycheck.

**Reach out to Fatherhood Programs.** “Fatherhood Programs” encompass a broad range of community-based human service initiatives 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. These programs may appreciate the opportunity to share information about the availability of the tax credits with participants. To find fatherhood programs, contact local human service agencies, churches, schools, early childhood programs and grassroots community groups.

## 8. Inform workers who are homeless.

### Why is it important?

According to the National Law Center on Homelessness & Poverty, research suggests 40 percent of families experiencing homelessness have children, and approximately 40 percent of all homeless adults are employed at some time during the year. As with other members of the workforce, workers who are homeless may not realize that they can qualify for the EIC and CTC even if they worked part-time or part of the year. Since part-time low-wage workers may have earned less than the income required to file a tax return, workers could miss out on tax credits for which they qualify.

Homeless workers face additional challenges that may prevent them from claiming the EIC and CTC. When workers move around from place to place, they may not receive mail consistently, making it challenging to ensure they will get their W-2 forms. Even when workers do receive W-2 forms and other tax documents needed to file a tax return and claim tax credits, it can be difficult to keep track of these papers without a permanent place to store them.

### How do you do it?

**Help workers find an alternative mailing address at which they can receive tax refunds.** Outreach materials should inform workers that they may be able to file returns 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 review their facility's mail handling

procedures to confirm there is a process to ensure that refund checks reach workers safely. For example, some organizations require mail to be opened in front of two staff members so that both persons can verify the checks that are received. Workers who are not staying in a shelter can use a relative's or a friend's address.

**Help workers obtain replacement W-2 or 1099 forms.** Inform workers that they can file taxes and claim tax credits even if they misplaced or did not receive their W-2 or 1099 forms. If they cannot get a copy from their employer, Form 4852, "Substitute for a Missing Form W-2 or Form 1099," can be completed and filed with a tax return. Form 4852 requests information about wages earned and taxes withheld, so it is helpful if workers can refer to documentation of their earnings for the year, such as a final pay stub, when completing this form. Workers who do not have a final pay stub may still be able to complete the form by estimating their earnings. Organizations can assist workers in determining if they can file Form 4852 and can find out if a local free tax filing assistance site can help them. *For more information on how to file taxes without Forms W-2 or 1099, contact the Center on Budget and Policy Priorities at (202)408-1080.*

**Reach out to organizations that interact with workers who are homeless.** Organizations such as food banks, soup kitchens, shelters, transitional housing programs and local welfare agencies come in contact with homeless workers and can inform them about the tax credits and the availability of free tax filing assistance. Provide training so staff at these organizations understand the importance of the EIC and CTC, how to claim the credits, where to find free tax filing assistance and how to share information with eligible individuals. Outreach Campaigns can help organizations revise intake forms to help identify

people likely to qualify for tax credits. For example, intake forms can include questions about whether a person is currently employed or has worked during the previous year and whether or not he or she filed a tax return. Once a caseworker or service provider meets with the client individually, additional questions can be asked to see whether the person may be eligible for the EIC or CTC.

Organizations running self-help programs or offering job placement assistance for homeless persons can also become involved in tax credit outreach 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](http://www.nationalhomeless.org)), *the Alliance to End Homelessness*, (202)638-1526 ([www.endhomelessness.org](http://www.endhomelessness.org)), *the National Law Center on Homelessness & Poverty*, (202)638-2535 ([www.nlchp.org](http://www.nlchp.org)) and *the National Coalition for Homeless Veterans*, 1-800-838-4357, ([www.nchv.org](http://www.nchv.org)).

**Work with shelters to establish on-site free tax clinics.** Bringing tax filing assistance to residents of a shelter or clients of organizations serving workers who are homeless can increase the likelihood that they are able to claim tax credits. Organize and train a group of volunteers to prepare taxes at different shelters in your area. *For more information about how to establish a free tax clinic, or to identify pro bono legal assistance for workers who are homeless, contact Laurel Weir, National Law Center on Homelessness & Poverty, (202) 638-2535 x 213 or [lweir@nlchp.org](mailto:lweir@nlchp.org).*



For eight years, Chaminade University of Honolulu (CUH) in Hawaii has worked with Volunteer Legal Services Hawaii (VLSH) to provide legal assistance and free tax preparation to people who are homeless. VLSH developed relationships with homeless shelters to let residents know that VLSH can provide free tax filing assistance to homeless workers, including those who are self-employed or day laborers and therefore may have complicated filing requirements. Each spring, an accounting professor at CUH coordinates a service-learning tax class to train students to reach out to homeless persons to encourage them to file their returns. To help prepare students, social workers visit the class to talk about the dynamics of homelessness. On weekends and evenings, students visit transition, emergency and domestic violence shelters to prepare tax returns. In 2006, students filed 61 tax returns that enabled homeless workers to obtain \$61,809 total refunds. *Contact: Wayne Tanna, CUH, (808) 739-4606, [wtanna@chaminade.edu](mailto:wtanna@chaminade.edu)*

### **Work with “homeless liaisons” in schools.**

Under federal law, every state is required to have a Coordinator for the Education of Homeless Children and Youth. School districts are also required to have a Local Educational Agency (LEA) homeless “liaison” or “coordinator” who identifies homeless children in schools and coordinates their educational services. Many liaisons work with community organizations and provide referrals to programs and services that can help children and their families. Contact your school district’s liaison to find out if he or she currently provides information about the EIC and CTC to families. Provide information about local VITA sites as well as a list of items clients need to bring with them. *See the “VITA Site Checklist” in the Outreach Campaign Tools Envelope of this kit. To identify your*

local liaison, contact your state's Coordinator for the Education of Homeless Children and Youth: [www.serve.org/nche/downloads/sccontact.pdf](http://www.serve.org/nche/downloads/sccontact.pdf).

**Work with street newspapers.** Street newspapers increase the public's awareness of issues related to poverty and homelessness. They provide employment opportunities, enabling people experiencing homelessness to sell the newspapers on the street. Homeless and formerly homeless people, advocates and professional writers contribute articles to street newspapers Outreach Campaigns can encourage publishers of street newspapers to inform sellers about the EIC and CTC. Outreach Campaigns can also work with street newspapers to publish stories about the tax credits and how workers, including those who are homeless, can claim them. Place an advertisement to recruit volunteers for free tax filing assistance in the paper and list the locations of free tax filing assistance sites. *To find out if there is a street paper in your area, contact the North American Street Newspaper Association: [editor@streetnewservice.org](mailto:editor@streetnewservice.org).*

**Enlist states, cities and counties that have a "Plan to End Homelessness."** In response to the Bush Administration's national goal to end chronic homelessness by 2013, 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 are encouraging local governments across the country to develop plans to end homelessness. Inform the entity leading the initiative in your area about tax credit outreach efforts and how claiming the EIC and CTC can help workers achieve goals such as securing housing. Encourage the agency to become involved in your campaign's outreach activities. *To find out if your state or city has a "Plan to End Homelessness" visit [www.ich.gov/library/10-year-plan-cities.pdf](http://www.ich.gov/library/10-year-plan-cities.pdf). View plans for some locations at [www.endhomelessness.org/section/tools/communityplans](http://www.endhomelessness.org/section/tools/communityplans).*

## 9. Reach out to Rural Communities.

### Why is this important?

According to the 2000 Census, the vast majority (96 percent) of the 500 counties with the lowest per capita income are in rural areas. Wages in many rural communities are lower than in larger cities, making it more likely that workers may qualify for the EIC. Eligible workers in rural communities may have difficulty learning about the EIC and CTC if tax credit information is not readily available. IRS offices are often far away. Fewer VITA sites are located in rural areas and commercial tax preparers may be scarce in some places. Social services agencies that usually provide EIC information may be visited less often in rural areas, where people have to travel great distances. Thus, outreach efforts are needed, especially in isolated communities, to provide a channel for tax credit information to reach rural workers.

### How do you do it?

**Learn the community.** Rural areas tend to have fewer existing coalitions conducting outreach efforts. Since rural communities tend to be close knit, 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.

**Focus on businesses in the commercial center of the community.** Residents of rural areas are likely to visit the nearest commercial center where they can fulfill multiple needs and patronize businesses such as the post office, laundry mat and grocery store. Conducting outreach and free tax preparation in establishments located in a community's commercial center will help ensure visibility and access. Both customers and employees

may qualify for the EIC and CTC. 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.** State agencies and statewide organizations in rural areas may be familiar to workers and can help establish trust. If the state Department of Human Services, the United Way or Catholic Charities are engaged in outreach, they may have connections in rural communities and may be able to offer resources to help support and enhance your campaign. Businesses that have established relationships statewide can help augment outreach campaign efforts in rural areas. For example, utility companies can be encouraged to include consumer education materials about the tax credits in utility bills sent statewide. These materials will reach customers in rural areas.

**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 offices focus on issues such as family nutrition, financial management and community economic development. Many university extension offices are already involved with tax credit outreach and have contact with families that could be eligible for the tax credits. 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/index.html](http://www.csrees.usda.gov/Extension/index.html).*

**Piggyback on an existing event.** Find out when there are community events where people will gather and how to become part of the agenda. This approach may be more effective than trying to arrange a special meeting for people to gather to learn about the tax credits. For example, local sports events, festivals, church picnics, back-to-school nights, PTA meetings or regional conferences can serve as prime opportunities to reach many eligible workers at once.

**Work with schools.** Schools in rural areas can serve as a communication network. Tax credit information can be sent home with students in primary and secondary schools. Community colleges and universities provide an important avenue to reach out to some working parents and low-income students not raising children. Hosting a VITA site at a school is particularly useful since most people in the community will be familiar with the location. *For more information, see p. 12 of this booklet.*

**Reach out to town councils and county commissions.** County commissions and town councils devote a lot of attention to identifying ways to stimulate the local economy. Create support for outreach by informing county commissioners and town council officials about how the EIC and CTC can contribute to an increase in the amount of money entering their communities. These officials often hold other positions in the community as well and can influence a variety of organizations to lend their support to tax credit outreach efforts.

**Establish a mobile tax preparation site.** Outreach Campaigns can help rural workers claim the EIC and CTC by creating a mobile tax

preparation site. The “site” could consist of a van in which several staff or volunteers prepare returns or could simply be one person using a car to visit several locations. Tax returns can be filed electronically using laptop computers. Groups that do not have access to laptops can try partnering with a college or university that may be able to provide computers as well as student volunteers. IRS offices can also loan computers to VITA sites if they are available. While mobile tax assistance sites can require additional planning to identify locations, arrange a schedule and coordinate advertising, they are an important way to help connect rural residents with free tax services.



The Northeast Oklahoma Community Action Agency (NEOCAA) in Jay, Oklahoma has been linking residents in three rural counties to tax credits and other public benefits for five years.

To reach out to the many farming and mining towns in the area, NEOCAA established a mobile tax site that schedules appointments five days a week at Head Start centers, offices of the Department of Human Services, city halls and the Indian Housing Authority. In 2006, NEOCAA filed 510 tax returns that brought eligible workers over \$400,000 in EIC refunds. Through a partnership with Arvest Bank, NEOCAA encourages residents to open a checking or savings account so they can receive their tax refunds from the IRS through direct deposit. NEOCAA also provides the option to have a federal tax refund direct-deposited into a temporary account NEOCAA established for taxpayers. When the refund arrives, NEOCAA issues a check to the client that can be cashed free of charge at one of Arvest Bank’s local branches. After the tax season, NEOCAA offers a series of financial education classes that feature a different topic each month such as budgeting, understanding credit and home buying. *Contact: Candy Watson, NEOCAA, (918) 253-4683, [cwatson@neocaa.org](mailto:cwatson@neocaa.org)*

**Use technology.** Since travel distances can be a barrier in some rural communities, it may be challenging to bring together tax credit outreach partners for planning and strategy meetings. Videoconferences or webcasts can be used to conduct meetings or trainings. If your organization doesn’t have the necessary equipment, other groups that do have the equipment including health care networks, insurance companies, local universities and community colleges, corporations and businesses, federal courts, state agencies, Cooperative Extension Services offices or Legal Services programs may be willing to host a meeting. Alternatively, some websites offer services to hold “web conferences” or interactive “webinars” that allow people to come together for a training or a meeting. 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. *For more information about websites offering services to help coordinate meetings, contact the Center on Budget and Policy Priorities at (202) 408-1080.*

## 10. Notify foster parents, grandparents raising grandchildren and other relative caregivers.

### Why is this important?

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. In addition, families that were not eligible for the EIC and CTC in the past may now qualify, since recent IRS rule changes make it easier to claim these credits for foster children. *For more information about EIC and CTC rules for foster parents, see p. 19 of the booklet, “Facts,” in this kit.*

It is important to make special efforts to let grandparents raising grandchildren know that they may be eligible to claim the EIC and the CTC. Many such grandparents may earn incomes that allow them to qualify for the EIC and CTC. According to the 2005 American Community Survey, nearly 2.9 million grandparents raising grandchildren were in the labor force.

### How do you do it?

**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. Don’t forget to let families know that, 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.)

**Work with public foster care agencies.** A number of state agencies may interact on a regular basis with foster parents and relative caregivers, such as child welfare agencies and agencies that administer TANF programs. Encourage them to incorporate information on claiming the EIC and the CTC in any training they provide for families. Sometimes caregivers who are raising a relative child receive TANF cash assistance to help support the needs of that particular child, even if they are not receiving cash assistance for their whole family. State welfare agencies can send families of these TANF “child-only cases” information about the EIC and the CTC.

Outreach partners can encourage public agencies to send information about the tax credits with foster care payments and cash assistance payments and to talk about the credits during home visits.

Encourage partners to include basic information about the credits, the appropriate tax forms for claiming the EIC and the CTC and links to places families can obtain free tax filing assistance. *For more information on linking families receiving child-only TANF payments with the tax credits, see “Developing Strategies to Address the Child-Only Caseload: Prattville, Alabama” at [www.peerta.acf.hhs.gov/pdf/childonly\\_prattville.pdf](http://www.peerta.acf.hhs.gov/pdf/childonly_prattville.pdf).*

**Reach out to community-based programs that support foster parents.** There are many community-based organizations that provide professional services — such as family counseling and crisis intervention — to foster parents and children in foster homes. Some organizations also offer help with school supplies and clothes. Encourage these organizations to share information about the availability of the EIC and the CTC.

**Involve foster parent associations and support groups.** Many foster parents participate in social and support groups for foster families. 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 state and local foster care associations in your area, visit the National Foster Parent Association website at [www.nfpainc.org](http://www.nfpainc.org).*

**Inform programs serving senior citizens about the tax credits and about Tax Counseling for the Elderly.** 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 availability of the EIC and the CTC 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.



Grand Central, Inc. in Philadelphia, Pennsylvania is one of the partners in the city's "Campaign for Working Families." Year-round, Grand Central provides information, referrals, family support, educational seminars, and support groups for more than 500 grandparents raising grand children and other relative caregivers. During the tax season, free tax filing assistance is offered by two trained staff members who schedule appointments following support group meetings. To help complete tax returns for those who are unable to travel to Grand Central, staff members will also go to caregivers' homes. In 2006, Grand Central completed 50 tax returns totaling \$15,031 in refunds. *Contact: Sandra Cross, Grand Central, (215) 557-1554, grandcentralinc@msn.com*

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](http://www.aarp.org/taxaide). *For more information on tax credits and other resources for grandparents raising grandchildren, visit [www.aarp.org/families/grandparents](http://www.aarp.org/families/grandparents).*

## 11. Reach out to tribal and Native communities

### Why is it important?

Efforts to improve the economic status of Native Americans — one in four of whom live in families with income below the federal poverty line — are growing. A 2005 study by the Harvard Project on American Indian Economic Development found that even on reservations without gaming the average income for Native Americans increased 30 percent from a decade ago. This increase is significantly higher than for the increase for the

U.S. population overall. Particularly in rural areas, a range of small businesses are emerging and contributing to economic growth. Hotels and casinos are also being developed. However, employees in small businesses generally earn low wages, as do workers in the service and tourism industries. Thus, despite the progress, the average income of Native Americans remains less than \$9,000 per year.

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 reluctant and guarded about relations with the federal government or people who are not part of their community. Thus, although many people in tribal communities could be eligible for the EIC and CTC, some may be hesitant to file taxes and claim tax credits. Tax filing can not only be intimidating, but may be perceived as being in conflict with traditional tribal values of self-reliance.

According to a Brookings Institution analysis, when Native families do file taxes, they are more than twice as likely as the general population to use a commercial tax preparation company. Native Americans, like workers who don't speak English as a first language and workers in low-income communities in general, are sometimes targeted by unscrupulous tax preparers. Thus, efforts to provide information about tax credits and free tax filing assistance is critical.

### How do you do it?

**Get to know the community.** Native communities are not homogenous. There are 562 federally recognized tribes, bands, nations, pueblos, rancherias, communities and Native villages in

addition to many other non-federally recognized groups. Tribes are self-governing and work to protect their independence and the culture of the tribe. It is important for outreach approaches and messages to be consistent with the values and beliefs of the tribe. Outreach Campaigns should also be mindful of community priorities and expectations. Limited resources among Native communities means people are inundated with numerous responsibilities and often work multiple jobs. Therefore, it may be difficult for people to commit to becoming involved with tax credit outreach, even if they are supportive of the outreach goals.

**Reach out to urban Native Americans.**

More than 65 percent of the four million Native Americans nationwide live in urban communities. The following ten cities have the largest American Indian and Alaska Native populations: New York, Los Angeles, Phoenix, Anchorage, Tulsa, Oklahoma City, Albuquerque, Tucson, Chicago and San Antonio. Urban Tax Credit Outreach Campaigns can work to expand their existing programs to serve Native Americans in urban areas.

**Work with a local organization.** Working with a trusted organization that is known in the community is especially important. Organizations serving tribal populations that may be interested in promoting the tax credits include health agencies, urban Indian centers and tribal councils. Some tribal governments administer Head Start, housing, and TANF programs. Establishing relationships takes time and it is critical not to rush this important process. Work through tribal organizations to develop the most effective outreach strategy. *For more suggestions see “Tribal and Native Community Resources” on the Center on Budget and Policy Priorities website [www.cbpp.org/eic2007](http://www.cbpp.org/eic2007).*



The Navajo Partnership for Housing (NPH) in Gallup, New Mexico, which strives to connect Navajo families to homeownership opportunities, established a VITA site in 2006 to help families save money for their future homes.

NPH promoted the site through advertisements in two local newspapers and by working with area employers to provide flyers and envelope stuffers for distribution to their employees. NPH also operates an IDA program for homeownership that provides a 3 to 1 match. At the IDA program sessions, the importance of claiming the tax credits and how they can help workers meet their homeownership goal was also explored. The VITA site was also promoted. In its first year NPH helped low-income families file 276 tax returns that provided average refunds of \$1,120. In 2007, NPH plans to partner with Tax Help New Mexico, a statewide coalition, to create five new VITA sites across the Navajo Nation. *Contact: Lavera Thompson, NPH, (505) 722-0551, [laverat@qwest.net](mailto:laverat@qwest.net)*

**Engage community members in planning an Outreach Campaign.** It is extremely important to be flexible and present opportunities for community members to share their thoughts and take ownership of the need for an outreach effort, especially in early stages of relationship building and planning. Some tribes have elder councils that function to maintain the tribal government’s involvement in culturally appropriate activities. Native elders and community leaders play a pivotal role in influencing the priorities of the community. Community members will know the most effective ways to work with tribal elders and other leaders.

**Contact tribal governments.** Tribal governments may be able to provide administrative and financial resources or in-kind support. If individual tribal

members are interested in tax credit outreach, they may need council approval to conduct an Outreach Campaign and organize free tax filing assistance. This could be a challenging process depending on the established priorities of the tribal council. Community members or organizations can give advice on who to approach. *To identify the tribal leaders in your area, visit the Tribal Leaders Directory and view tribal leaders by region at [www.doi.gov/leaders.pdf](http://www.doi.gov/leaders.pdf) or visit [www.ncai.org](http://www.ncai.org).*

**Reach out to Native-owned businesses.** There are over 206,000 Native-owned businesses in the country. Businesses can promote the tax credits by sharing information with customers as well as employees. Native-owned businesses are also potential outreach partners and can contribute to developing the outreach strategy. Businesses that are located on or near reservations can help identify concerns and issues that are important to the community which can influence outreach messages. *For a directory of Native-owned businesses visit [www.sba.gov/naa/business.html](http://www.sba.gov/naa/business.html).*

**Work with tribal community colleges and universities.** Beyond their role as institutions of higher learning, the more than 30 tribal community colleges and universities across the country also serve as community centers, libraries, career centers, 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 assistance. Tribal colleges also can inform students about the EIC and CTC and encourage them to tell family members and neighbors about the tax credits. *The American Indian Higher Education Consortium provides contact information for all tribal colleges and universities in the U.S. at [www.aihec.org](http://www.aihec.org).*

**Utilize Native radio and Native newspapers.**

Native media not only provide coverage of Native issues, but can also deliver information in the language or dialect of a particular community. Some radio stations are dedicated solely to covering Native issues, while others have Native programs that air at specific times. Tribal Outreach Campaigns can conduct an interview on a talk radio program or air a PSA. In addition to publishing stories about how claiming the EIC and CTC can benefit families and communities, Native newspapers can advertise the tax credits and free tax filing assistance. Non-Native media may also be influential in Native communities. Work with local organizations and partners to identify media that would be interested in covering a Tax Credit Outreach Campaign. *See p. 35 of this booklet to learn more about how to use the media.*

*Building Native Communities: A Tribal Leader's Guide to Launching an Earned Income Tax Credit (EITC) Campaign*, produced by the Native Financial Education Coalition (NFEC), is a useful resource for helping tribal leaders conduct tax credit outreach. Since 2000, NFEC, facilitated by First Nations Oweesta Corporation, has worked to increase financial education in Native communities and build the capacity of tribes and tribal organizations to provide financial skills and training. It also published *Building Native Communities: Financial Skills for Families*, a curriculum for financial education providers in Native communities that includes a chapter on the EIC. *To find out where these guides are being used and to order free copies contact First Nations Oweesta Corporation, (605) 342-3770 or [info@oweesta.org](mailto:info@oweesta.org). To learn more about NFEC visit [www.nfec.info](http://www.nfec.info).*

## 12. Notify members of the military and their families.

### Why is this important?

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 in some cases can result in a significant reduction in a family's income. Military families 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, operates a military Volunteer Income Tax Assistance (VITA) program. VITA sites are established at 300 U.S. military installations and are publicized through articles in military installation newsletters. Military VITA sites file over 500,000 federal returns each year.

While such assistance and outreach is important, it may not reach some members of the military or their families. Spouses or family members who handle their family's tax returns and do not live near a military post may not receive the tax information and assistance provided there. Some members of the military (such as those newly entering the service) may be accustomed to having their tax returns done by friends or by commercial preparers. Preparers who seldom assist persons in the military with tax returns may not be well-versed in the special rules regarding their eligibility for the EIC and CTC.

For example, there have been recent changes in the rules regarding the treatment of combat pay in determining eligibility for the EIC and CTC. Members of the military who were not previously

eligible for the EIC or the CTC may now qualify and not realize it. Military personnel are protected against losing eligibility for the EIC or CTC due to deployment into a combat zone. *For more information on eligibility rules for military personnel and their families, see p. 20 of the booklet, "Facts," in this kit.*

### How do you do it?

**Develop outreach materials for members of the military and their families, especially families that do not have access to military installations.** Outreach Campaigns located in areas where National Guard or Reserve units have been activated can augment their general materials promoting tax credits to address such issues as changes in the treatment of combat pay for EIC and CTC eligibility determination, EIC eligibility for military members assigned overseas, and special extensions of tax filing deadlines for military personnel serving in a combat zone.

**Reach out to organizations that provide support for military families in your community.** Contact the Family Assistance Center for the military unit in your area to ensure it is aware of the EIC, CTC and any 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 [families@nmfa.org](mailto:families@nmfa.org) for suggestions on who to contact or visit the website: [www.nmfa.org/site/PageServer?pagename=links#FamilyAssistance](http://www.nmfa.org/site/PageServer?pagename=links#FamilyAssistance).*



The Vance Child Development Center (VCDC), in Oklahoma promotes the EIC, CTC and free tax help to parents by displaying posters and distributing brochures and envelope stuffers. VCDC primarily cares for children in military families and directs parents to the free tax filing assistance site run by Vance Air Force Base (VAFB), which is staffed mostly by military volunteers. VAFB helps advertise its VITA site by placing notices in its weekly bulletin and the Vance Newspaper. In 2006, the VAFB VITA site completed 486 federal tax returns totaling \$677,530 in refunds. *Contact: Carmella Gonzalez, VCDC, (580) 213-7310, [carmella.gonzalez.ctr@vance.af.mil](mailto:carmella.gonzalez.ctr@vance.af.mil) or Sergeant Christopher Stein, VAFB, (580) 213-7404, [christopher.stein@vance.af.mil](mailto:christopher.stein@vance.af.mil)*

If you are near a military installation, contact your IRS Territory Manager to discuss how to best refer members of the military living off-post to the VITA services offered at the post or base. *Contact information for IRS Territory Managers is on p. 30 of the booklet, "Free Tax Help and Asset Development," in this kit.*

### 13. Use the media to bring your campaign together.

#### Why is this important?

Strategic use of the media can widen the reach of your campaign. While there is no substitute for one-on-one outreach to low-wage workers, reading about the EIC and the CTC in the newspaper or hearing about it on the radio can reinforce information workers may have received from an employer, a child's school or a community agency.

Media coverage of your campaign activities also can attract new partners and help recruit volunteers. Stories that feature working families that have been helped by tax credits for low-wage workers also can foster public support for assisting working families and individuals.

#### How do you do it?

#### Educate the media about tax credits for low-wage workers and your campaign efforts.

- **Create a media packet.** A media packet should include a fact sheet explaining why the EIC and the CTC are important and why outreach is needed, who is eligible, and how workers claim their credits. It also should include a list of VITA sites, local participation data and a list of campaign partners.
 

Try to provide brief stories illustrating how local families were helped by the tax credits. It is especially helpful to find families willing to talk to reporters about their experiences. Always get permission before sharing anyone's name and phone number with a reporter.
- **Compile a media contact list.** Identify the people at local newspapers, radio stations and television stations most likely to be interested in covering a tax credit story, including reporters assigned to human services, feature writers, financial or business editors, or personal finance columnists. There may be more than one good contact at larger news organizations. For smaller ones, the city editor or the assignment editor often will be your best contact. If you want to reach media statewide, include the state Associated Press.

- **Pitch the story from an angle the reporter or writer would find most compelling.** For example, a personal finance editor might be interested in how VITA can save money for low-income taxpayers or how the tax credits helped a working family put together the money to buy a car needed to get to work. A real estate editor might be interested in how a local family was able to reach its goal to become a homeowner by using the tax credits toward a down payment.
- **Make special efforts to reach out to the non-English language media.** Families that primarily speak languages other than English often rely heavily on their own community media. Radio can be a particularly powerful tool. Work with community organizations that represent the audience you are trying to reach. Ask for their help in preparing news releases and identifying community leaders to be spokespersons. Tailor the news release to address issues of special interest to the target audience. For example, explaining that immigrants who are legally authorized to work can get the EIC may be the most important message for some communities.
- **Plan a media event to publicize the Outreach Campaign.** A special event can help kick off your campaign, draw attention to new VITA sites or advertise a new hotline number. Getting a high-profile public official or community leader to participate can help draw reporters to cover the event. The setting for your event should help illustrate the purpose of the EIC and the CTC, as well as the goals of your campaign. For example, to emphasize that the EIC helps working families keep their jobs, hold the event at a local child care center and ask a parent to give a brief statement about how the EIC helped her cover the costs of child care. To promote the role of employers, conduct the event

at a worksite where low-wage workers are employed. Ask the employer to talk about why it is in the best interest of businesses to promote the EIC and CTC. Develop a set of “talking points” so that campaign spokespersons are well-prepared for interviews with reporters.

- **Provide material for talk shows and the op-ed page.** Pitch the tax credits as a great topic for radio or television talk shows, especially those that cover public affairs or consumer affairs topics. Large businesses, such as utility companies, often sponsor consumer affairs shows on public access television. Meet with the editorial board of the local newspaper to make the case for including an editorial about the value of the credits for low-wage workers. Or, submit an op-ed piece or opinion column. Write a letter to the editor to increase awareness about the EIC and the CTC.

#### **Use the media to advertise tax credits and free tax filing assistance.**

- **Advertise in print.** Weekly or small community newspapers may be willing to print your flyer as an advertisement. Be sure the flyer includes a local phone number for more information and provides the locations of neighborhood VITA sites. Shoppers Guides and circulars that advertise in-store sales also are good places to run messages about tax credits for low-wage workers.
- **Advertise on the air.** Radio stations and local television stations may be willing to run public service announcements (PSAs) about the EIC and the CTC. Some stations may want you to record your own PSA, but may be willing to help you produce the spot; others may prefer that you provide a script for the station’s announcer to read.



To appeal to people who put off filing their taxes until the last minute, the United Way of Escambia County in Pensacola, Florida, coordinated a live radio broadcast from the Post Office on

April 17, 2006. Every 15 minutes during the four-hour broadcast, announcements were made to let listeners know that it wasn't too late to get free help to file a tax return before the deadline.

Announcements also alerted relocated hurricane Katrina survivors that assistance with hurricane specific tax issues and requesting an extension to file a tax return were also available. United Way staff and three tax preparation volunteers set up at the Post Office. They received over 100 calls, completed 56 tax returns and assisted more than 50 individuals who filed for extensions. A local credit union was also present to open accounts. *Contact: Susan Senkarik, United Way of Escambia County, (850) 434-3157, susan@unitedwayescambia.org*

- **Involve campaign partners to help negotiate best broadcast times.** Although PSAs run for free, stations seldom broadcast them at the most favorable times of day. Purchasing air time can be very expensive, but some Outreach Campaigns have been able buy a limited amount of time and convince the radio or television station to match the purchase with additional time or a better time slot. In one community, a utility company had access to the television spot that ran right after the state lottery numbers were announced each evening. The company agreed to use the spot for an EIC message directed to all the viewers not lucky enough to have picked the winning numbers that night!

- **Use other high-visibility advertising methods.** Billboard advertising should be eye-catching and messages should be very brief. Billboard space can be donated by local advertising agencies. Ads on public transportation, such as bus shelters, busses and trains, also are useful and transit authorities may be willing to donate the space. *For information on how the poster in this kit can be modified for public transportation displays, contact the Center on Budget and Policy Priorities at (202) 408-1080 or via email at eickit@cbpp.org.* In some movie theaters, slides with local ads are projected on the screen before the film. Check with the theater manager to find out how a tax credit ad can be included.

Teleduction, an independent production company based in Wilmington, Delaware, can customize a package of four 30-second PSAs about free tax preparation and the EIC (two for television and two for radio in English and Spanish) for Outreach Campaigns anywhere across the country. These announcements have been used by several outreach campaigns, including the Delaware EIC Outreach Campaign. *To view samples of the PSAs and to place an order visit [www.teleduction.com/tax.htm](http://www.teleduction.com/tax.htm) or call (302) 429-0303. For more information about how the Delaware Outreach Campaign used the commercials contact: Mary Dupont, the Nehemiah Gateway Community Development Corporation, (302) 655-0803 or [mary@marydupont.com](mailto:mary@marydupont.com).*

---

# Additional Resources to Help Tax Credit Outreach Campaigns

---

## Reports and Resources

***A Hand Up: How State Earned Income Credits Help Working Families Escape Poverty in 2006, Center on Budget and Policy Priorities.*** This report describes key design features of an effective state EIC and the cost implications of implementing a state credit. It also features case studies from states that have implemented their own EICs. *Visit the Center's website at [www.cbpp.org](http://www.cbpp.org) and click on the EIC Areas of Research to obtain this report. For more help with state EICs, call the Center's State Fiscal Project at (202) 408-1080.*

***Exploring United Way Engagement in EITC Campaigns: A Report to the Field, United Way of America.*** This report details the contributions of local United Ways that promote and advance the EIC. It explains why United Ways participate in EIC campaigns, discusses the link between the EIC and asset building initiatives, and describes the various levels of engagement by United Ways. The report concludes with suggestions for United Ways interested in participating in a local EIC campaign. *Look for this publication at [national.unitedway.org/files/pdf/eitc/UWA\\_EITC\\_Report\\_to\\_the\\_Field.pdf](http://national.unitedway.org/files/pdf/eitc/UWA_EITC_Report_to_the_Field.pdf).*

***Hispanic Families and the Earned Income Tax Credit, National Council of La Raza.*** This report calls the EIC “the most effective and efficient anti-poverty program for Hispanic Americans.” The report outlines the importance of the EIC to Hispanics and offers suggestions for improving the credit for Hispanics and other low-wage workers. *Contact Magdalena Lezama at (202) 785-1670 for additional information or visit [www.nclr.org/content/publications/detail/1397/](http://www.nclr.org/content/publications/detail/1397/) and register at the NCLR web site to download a copy of the article for free.*

***Screening Tools to Help Working Families Access Public Benefits, National League of Cities' Institute for Youth, Education, and Families.*** This guide provides an overview of the advantages and disadvantages of different multi-benefit screening tools, and factors to consider when selecting one for national or local use. *View this publication at [www.nlc.org/content/Files/IYEF%20Screening%20Tools.pdf](http://www.nlc.org/content/Files/IYEF%20Screening%20Tools.pdf).*

***Who Knows About the Earned Income Tax Credit? The Urban Institute.*** This report presents the findings of a survey of low-income families' knowledge about the EIC. A major finding was that low-income Hispanic parents are much less likely than low-income non-Hispanic parents to know about the EIC. In addition, former TANF participants are much more likely to know about the EIC than current TANF participants. These knowledge differences are related to differences in the rates of receiving the credit. *Contact: Katherine Ross Phillips at (202) 261-5709 for additional information or visit [www.urban.org/UploadedPDF/anf\\_b27.pdf](http://www.urban.org/UploadedPDF/anf_b27.pdf).*

**The Brookings Institution** has released several reports that can be found at [www.brookings.edu/es/urban/eitc/index.htm](http://www.brookings.edu/es/urban/eitc/index.htm):

- ***Step in the Right Direction: Recent Declines in Refund Loan Usage Among Low-Income Taxpayers***, examines trends in the usage of Refund Anticipation Loans (RALs) among taxpayers who receive the EITC. While RAL usage remains high, especially in the south, this study found that fewer EITC recipients used RALs in tax year 2002 than 2001.
- ***The Price of Paying Taxes: How Tax Preparation and Refund Loan Fees Erode the Benefits of the EITC***, provides an analysis of the impact of commercial tax preparation fees on EIC claimants and suggests ways that Outreach Campaigns can respond.
- ***Rewarding Work Through the Tax Code: The Power and Potential of the Earned Income Tax Credit in 27 Cities and Rural Areas***, is a series of 27 regional analyses that provides data on the number of EIC claimants in specific communities.
- ***¿Tienes EITC? A Study of the Earned Income Tax Credit in Immigrant Communities***, presents an analysis of 2000 ZIP code-level data from the IRS and Census to compare the EIC claim rate, usage of commercial tax preparers and purchases of RALs among high-immigrant and low-immigrant communities.
- ***The “State” of Low-Wage Workers: How the EITC Benefits Urban and Rural Communities in the 50 States***, is an analysis of 2001 IRS tax data from 50 states, which describes the geographic distribution of low-income working families who claim the Earned Income Tax Credit.

**The Brookings Institution** website also provides data on EIC and CTC claims by zip code, for tax years 1997 through 2003 at [www.brookings.edu/urban/eitc](http://www.brookings.edu/urban/eitc).

## Coalitions and Partnerships

**The National Community Tax Coalition (NCTC)** is a project of the Center for Economic Progress in Chicago, Illinois. NCTC was formed to bring together the expertise of community-based free tax preparation and low-income tax credit outreach groups from around the country. The NCTC website features a Technical Assistance Resource Library providing materials on creating and operating free tax preparation programs, outreach and marketing, and financial literacy and asset-building programs. *For more information contact Jackie Lynn Coleman, Coordinator, NCTC, (312) 630-0261, [jlcoleman@centerforprogress.org](mailto:jlcoleman@centerforprogress.org) or visit [www.tax-coalition.org](http://www.tax-coalition.org).*

**National EITC Outreach Partnership.** The Center, the National Community Tax Coalition, National League of Cities, The Annie E. Casey Foundation and the IRS convened the National EITC Outreach Partnership to connect national EITC outreach partner organizations with the growing network of local EITC outreach organizations, free tax preparation programs and asset development efforts. This Partnership explores the best ways to involve a larger number of national organizations to engage their local partners in EITC Outreach Campaigns. The Partnership’s website contains descriptions of efforts by over 20 national

organizations participating in the Partnership and also contains detailed information on local community tax outreach partnerships nationwide. *For more information, see [www.cbpp.org/eitc-partnership](http://www.cbpp.org/eitc-partnership).*

**The Native Financial Education Coalition (NFEC)**, facilitated by First Nations Oweesta Corporation, works to promote financial education in Native communities. It recently published *Building Native Communities: A Tribal Leader's Guide to Launching an Earned Income Tax Credit (EITC) Campaign*. This guide includes many resources including an overview of the EIC and how Native families and communities can benefit from claiming it and a list of ten things tribal leaders can do to promote the EIC. *To order a copy contact First Nations Oweesta Corporation, (605) 342-3770 or [info@oweesta.org](mailto:info@oweesta.org).*

## Toolkits and Materials

**Corporate Voices for Working Families (CVWF)** has developed an EIC tool kit for employers. CVWF is a non-partisan, non-profit corporate membership organization created to bring the private sector voice into the public dialogue on issues affecting working families. The Corporate Voices tool kit provides information for employers nationwide about how to notify employees about the EIC. The tool kit includes posters, a calendar of dates to remember, a pay check stuffer and stickers. Portions of the tool kit can be downloaded from the Corporate Voices website. *For more information contact Susan Holbrook, Program Manager, Corporate Voices, (202) 333-8922 or visit [www.cvworkingfamilies.org](http://www.cvworkingfamilies.org).*

### **EIC promotional materials, tax forms and other useful information for EIC Outreach**

**Campaigns are available from the IRS.** Promotional materials are generally available in large quantities for free. The IRS also has prepared a short EIC video that organizations can show to employees, clients or potential volunteers. *To order, contact your IRS Territory Manager; phone numbers are listed on p. 30 in the "Free Tax Help and Asset Development" booklet in this kit. To find tax forms and tax-related publications, visit [www.irs.gov](http://www.irs.gov). The IRS now provides on-line information and resources to assist outreach partners at [www.irs-eitc.info/SPEC](http://www.irs-eitc.info/SPEC).*

**Maximizing the EITC in Your Community: A Toolkit For Municipal Leaders, National League of Cities' Institute for Youth, Education, and Families.** The toolkit offers a detailed guide to the opportunities for municipal leadership, including: public education to ensure that eligible families know about the EIC and other relevant supports; free or low-cost tax preparation campaigns to help them claim the credit; and efforts to maximize the value of the credit by providing incentives to save or make investments that will promote self-sufficiency. *An easy-to-navigate electronic version is available at [www.nlc.org/nlctoolkit/html](http://www.nlc.org/nlctoolkit/html). For questions about the toolkit contact Abby Hughes Holsclaw at (202) 626-3107 or [holsclaw@nlc.org](mailto:holsclaw@nlc.org).*

**Refugee Works: The National Center for Refugee Employment and Self-Sufficiency** is a national program of the Lutheran Immigration and Refugee Service that supports job development efforts for refugees. The organization offers a curriculum that provides information about the EIC for those who speak English as a second language. The curriculum, which includes beginning through more advanced levels, consists of easy-to-follow, detailed lesson plans, including group activities, handouts and worksheets. *To obtain the curriculum email Refugee Works at [chamilton@refugeeworks.org](mailto:chamilton@refugeeworks.org) or for more information, contact Cheryl Hamilton, Refugee Works, (410) 230-2751.*