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ABOUT THE NETWORK

The EITC Funders Network brings together funders interested in the Earned Income Tax Credit, free- and low-cost tax preparation, and asset building. The Network seeks to increase awareness of EITC-related projects, foster collaboration, share information about the current status of EITC-related work, and help shape the future of the field.

The Network is generously funded by:

*The Annie E. Casey Foundation
The W.K. Kellogg Foundation
The C.S. Mott Foundation
The Piton Foundation*

A Note From the Coordinator

Dear EITC Funders Network,

In the words of the great musician Sam Cooke “It’s been a long, a long time coming; But I know a change gonna come.”

While probably not of the variety to which Mr. Cooke was referring, change is coming to the EITC Funders Network!

Later this month, we’ll be unveiling our new website. Re-tooled to bring the most pressing information forward, easier to use, and more aligned with how people are using the web these days, we feel this will be an advancement that aligns our goals and practice and responds to what you have been asking us for!

New feature include:

- Quick links to Network events
- Fast facts and recent news on impact areas
- Briefs on facts, figures and EITC-related research
- Easy to access library of past Newsletters

Be watching your email for the official website launch announcement!

Sincerely,

Ami Nagle, Coordinator, EITC Funders Network

Check Out Our Recent Webinar!

Behavioral Economics & Tax Time

An informative session with Professor Dan Ariely,

Author of NY Times Bestsellers Predictably Irrational, The Upside of Irrationality and The Honest Truth About Dishonesty.

[Click here](#) to watch the webinar

Interview with a Funder



Angela Reynolds,
Director of Programs for Financially Struggling Adults and Families,
United Way of Allegheny County

News from the Field

National Community Tax Coalition Closes

On April 30, 2014 the Board of the National Community Tax Coalition (NCTC) let the EITC Funders Network and other collaborators know that NCTC has closed its doors.

The EITC Funders Network has received briefings from NCTC Board members about the current state and future plans. The EITC Funders Network has been gathering a small group of Network members to identify the needs of funders and the field in the wake of this loss.

If you are interested in joining this discussion, please contact Ami Nagle at ami@eitcfunders.org.

Tell us about your funding portfolio. What kinds of efforts are you focusing on right now?

At the United Way of Allegheny County, our portfolio focuses on supporting financially struggling adults and families. We target three areas: homelessness prevention, including emergency and housing support; workforce development; and increasing access to benefits and resources such as the EITC, WIC and SNAP. We focus quite a bit on fostering collaboration in all aspects of our work. We work with other funders on the Campaign for What Works, which is a state-wide effort to ensure the future of vital human service programs focused on keeping children safe, supporting seniors and people with disabilities, and protecting vital programs for struggling families, including transportation, health care and public education.

Why does the United Way of Allegheny County support EITC-related work?

The connection to our mission and the purpose of our EITC-related work is clear to us. We have a strong focus on supporting low-income working families. Since the EITC is one of the major anti-poverty programs designed to support low-income working families, helping families access the EITC is directly in line with our strategy. We invest approximately \$300,000 annually into our EITC-related work. This is largely targeted at supporting the free tax preparation coalition efforts here locally. Last year, the coalition completed over 6,800 returns resulting in \$11 million in refunds, of which \$4.8 million were EITC refunds. Our investment in EITC-related work has a high rate of return. Our board members are supportive of this work because it provides an opportunity for us to play a critical role in fostering collaboration among our partners and have an impact in the community. In addition to providing financial support, we use our 211 service to both set up appointments and collect data about requests for services related to the EITC. This information helps us to identify areas of the community in need of tax services for subsequent years.

What kind of EITC-related work does the United Way of Allegheny County support?

Our focus on EITC-related work started in 2009 when a community-based organization, which had reached its capacity, approached us about partnering on free tax preparation work. This group suggested that we become the hub for this work in the community.

Since then, our work has grown to be a collaborative of 11 organizations that focuses on supporting both benefit screening efforts and free tax prep sites. Our role includes providing general oversight to both efforts; monitoring data collection; and providing technical support to partner agencies by providing training to all volunteers. This is a great public private partnership as the program is funded by an IRS/VITA grant, the United Way Impact fund, and support from Walmart Foundation and PNC Bank. Through our 211 system we provide

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Outreach & Tax Preparation

Report Shows Impact of VITA Sites in Native Communities

A report from First Nation's Development Institute shares the importance of VITA sites in Native communities throughout the US. The report, titled "VITA Sites Serving Native Communities: The State of the Field," presents recent data on Native VITA sites related to the amount of returns completed and amount of refunds claimed. In 2013, 145 VITA sites serving Indian Country filed a total of 48,413 tax returns, facilitated \$70,058,032 in refunds, and helped people claim approximately \$26,030,000 in the EITC. It is estimated that these 145 sites saved Native American filers \$7,261,950 in preparation fees alone, based on an estimate of \$150 in fees per filer. To view a copy of this report, [click here](#).

Policy

EITC Expansion Would Strengthen Credit for Childless Workers

A recent [article from CBPP](#) shows how childless workers are "taxed into poverty," making the case for the expansion of the EITC. Proposals for expanding the EITC to childless workers are included in both the President's budget for 2015 and bipartisan proposals from both the House and Senate. Both proposals are highlighted in a brief from the Brookings Institution and include expanding the eligible age requirements and an increase in the maximum credit phase in/out range. The report highlights that each proposal would significantly strengthen the credit for millions of workers; at least 15 states would double the number of filers eligible for the childless worker credit; and every major metro area would see thousands of workers benefit from an expanded EITC. [Click here](#) to read the full report.

EITC

Benefits Access

Study Suggests Shift in American Attitudes About Poverty and Social Safety Net

A Recent study of American attitudes about work, economic opportunity and poverty illustrate that the American public will support efforts to expand economic opportunity, increase access to good jobs and wages, and maintain a robust social safety net. The Center for American Progress' study shows a shift from harsh negative attitudes about the poor toward an understanding that many Americans — poor and middle class alike — are struggling to meet basic needs in an uncertain economic climate. The findings of this report should buoy efforts aimed to strengthen programs and services to reduce poverty and expand the social safety net for struggling Americans. [Click here](#) to read the full article.

Financial Empowerment

Using Gamification to Educate Youth About Finances

Findings from a gamification — that is, using a game as a teachable moment — pilot conducted by the D2D Fund in Birmingham, AL offers insight into the potential for using gamification concepts to motivate low to moderate income youth to learn financial concepts during summer vacations. Key findings include that gamification has potential as a tool to improve engagement around important financial challenges, like preparing for college; it offers a "frame" advantage as activities are repackaged in a structure familiar to audiences that are already playing video games extensively; and it incorporates many different components, like leveling and quests, familiar to gaming teens. [Click here](#) to read the article.



Interview with a Funder (continued from page 2)

appointment management for all sites as well as data collection about requests. We monitor and track data to better understand the need for and utilization of our services throughout the community. Our data collection efforts inform our strategies year to year.

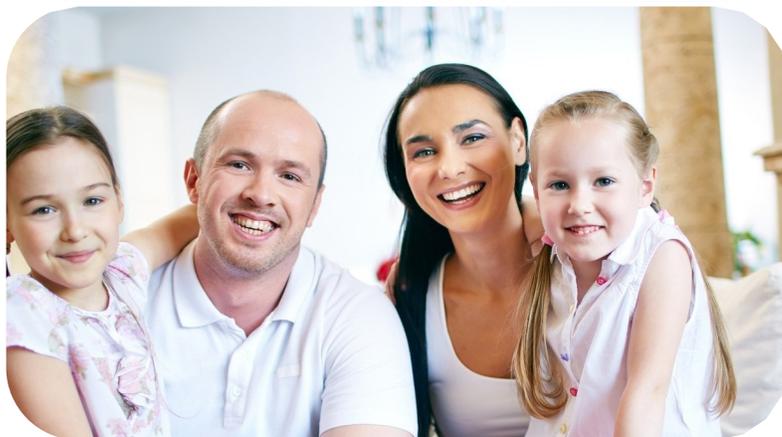
Through our data collection and monitoring efforts, we have been able to identify particular populations who are accessing the EITC at relatively low levels. People with disabilities and veterans are two groups in our community which we have not been able to serve through our EITC campaign as much as we'd like. We are considering ways to reach out to these groups in more effective ways. One strategy we are considering includes mobile tax preparation sites, which would mean going to where the people are instead of expecting people to come to us.

In addition to identifying strategies to reach particular subpopulations, we are also considering strategies to improve our training program. We are hoping to establish a partnership with a local university as a way to train volunteers and provide academic course credits as well. Because the time commitment for training may be a deterrent for some volunteers, we modified our training to include both online modules and in-person training. This shifts our fast-track training from an 8-hour face-to-face training to one 2-4 hour online session and one 4 hour face-to-face session.

An important evolution of our work is related to marketing. We are trying to do a better job of connecting people who may not qualify for services through Allegheny County's Money in Your Pocket Coalition to other free tax prep services, such as other VITA sites sponsored by the AARP and others. We want to spread the word far and wide and provide as many opportunities for people to access these sites as possible. We are also committed to better utilizing social media not only as a "get the word out" strategy, but also as a way to manage appointments more effectively.

Are there any EITC issues that you've been struggling with that you'd be interested to hear your colleagues and/or the field address?

I'd be interested to hear my colleagues' thoughts and strategies related to addressing capacity issues of free tax prep sites. We have a high number of calls into 211 during tax time, so we bring on extra staff, but the capacity of our sites cannot handle the additional volume. We are limited by the number of volunteers we have trained for each site. As a way to build our capacity to complete more returns, we are considering allowing clients to drop off returns, meaning that their returns are completed by a volunteer while the client is not present. I would like to hear about other colleagues' experiences with this strategy (or others!) to increase the number of families we can help.



Join us at the CFED's Assets Learning Conference

The EITC Funders Network is in the process of planning a session for funders in conjunction with CFED's annual conference in September in Washington DC. [Click here](#) to learn about the conference and consider joining us. More information soon on our session for funders.