

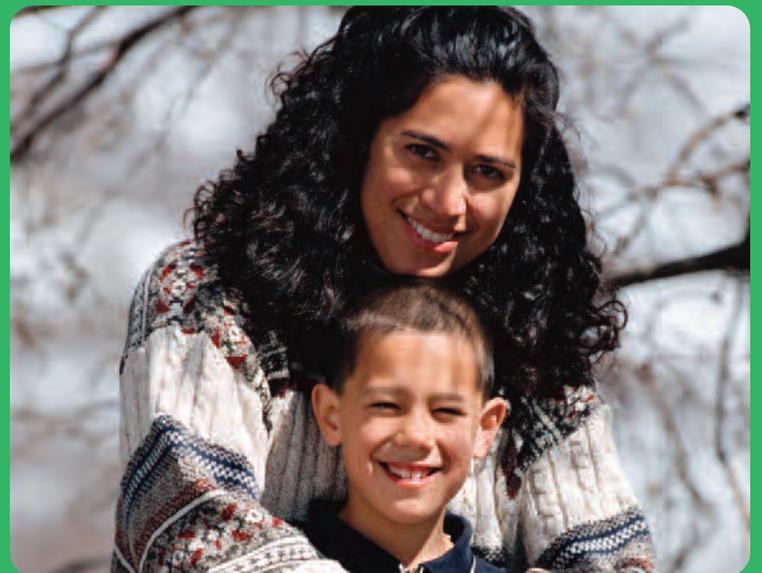
EITC

Funders Network

Community Foundations and the EITC

Brief 2: Building and Expanding

December 2009



About the EITC Funders Network

Founded in 2004, 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 work of the EITC Funders Network is guided by a Steering Committee comprised of Irene Skricki of the Annie E. Casey Foundation, Alice Warner of the W.K. Kellogg Foundation, Benita Melton of the C. S. Mott Foundation, Diane DiGiacomo of the Piton Foundation, and Steven Lee of the Robin Hood Foundation.

The Community Foundation project has been guided by a Steering Committee comprised of Karen Bilowith of the Community Foundation for the Greater Capital Region, Alyssa Hauser of the Community Foundation of Greater Dubuque, Sandi Roehrig of the Fond du Lac Area Foundation, Karen Rolon of the Community Foundation of Greater Birmingham, Deborah Schachter of the New Hampshire Charitable Foundation, Heather Scott and Kensei Brittain of the Council on Foundations and Shiloh Turner of The Erie Community Foundation.

Community Foundation Briefs

Across the country, community foundations are critical funding and program partners for EITC outreach, free tax preparation, and asset-building fields. In 2009 the EITC Funders Network interviewed staff members of 15 community foundations in order to learn more about the strategies community foundations use in their EITC and free tax preparation work. These Briefs summarize our findings, share promising practices, and provide advice from community foundation staff on the most effective first steps in supporting an EITC effort in the community.

Brief 1: Getting Started

A look at the EITC and first steps in getting involved:

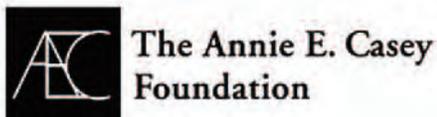
- ◆ Step 1—What is the EITC?
- ◆ Step 2—How does the EITC impact families and communities?
- ◆ Step 3—How is EITC-related work aligned with community foundation mission, goals, and structure?
- ◆ Step 4—What do your colleagues in the field say about best first steps?
- ◆ Tools and Resources

Brief 2: Building and Expanding

A look at how community foundations launch and sustain EITC-related efforts:

- ◆ Step 5—What is your role?
- ◆ Step 6—Who are your partners?
- ◆ Step 7—What do your colleagues say about initiating and supporting the work?
- ◆ Step 8—What are the challenges?
- ◆ Tools and Resources

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Brief #2: Building and Expanding

Be sure to review Brief #1 for information on why the EITC is an important strategy and recommended first steps in supporting EITC-related efforts.

Step 5—What is your role?

Once you listened to colleagues and planned your EITC work, it is time to dive in.

As many community foundation staff members noted during interviews for this Brief, “There’s no one-size-fits-all.” Community foundations play many different roles in supporting EITC and free tax preparation work. The role that you play will be driven by your community foundation’s structure, funds available, and capacity, as well as taking an honest and thorough look at what is already happening in your community so you can explore how to best support it. It should also be noted that foundations need to be nimble in this work—over time your role may change, and what makes sense today, may not make sense next year.

Community foundations take on a variety of roles to support EITC and free tax preparation work:

- ◆ **Convener**—many community foundations have found convening to be a useful way of adding value, one that plays into their strengths of being well-networked in the non-profit and funding arenas. Playing this role generally means bringing ideas and partners to the table, and helping move the EITC work forward. Convening happens at multiple points:
 - ◆ **Convening Program Partners to Listen**—as we discussed in *Brief 1: Getting Started*, this is especially useful when a foundation explores how to add value to existing efforts, although community foundations have also convened program partners in an effort to figure out which non-profit partners might be well placed to add EITC programming to their workload.

Impact

Each year, the EITC lifts 4.4 million people—half of whom are children—out of poverty by bringing their income above the poverty line.

- ◆ **Convening Partners to Build Shared Goals**—many community foundations have convened organizations that already implement EITC strategies in their communities in an effort to build collaboration. The meetings have explored opportunities to foster collaboration, help share best practices, and build a structure for working towards common goals. For one community foundation this has meant merely providing a space to talk and being present as a partner at the table. Another has been more active in helping facilitate conversations and build more active partnerships in the field. In the words of one community foundation staff member, “EITC allows you to empower communities to make collective decisions, instead of utilizing a single organization.”

- ◆ **Convening Partners to Leverage Funding**—for some community foundations this means leveraging the EITC refund to build further economic stability by convening partners to connect their EITC efforts to asset-building supports, like IDAs, traditional banking services, and financial literacy. For other community foundations it means bringing potential funders together in an effort to bring sustainability to the work. This is an opportunity to connect other funders to your compelling argument and link the benefits of EITC to the missions of partner foundations. One Midwestern foundation helps set the agenda and facilitate the monthly meetings of the local asset coalition, which represents financial institutions—banks and credit unions—as well as community organizations.

- ◆ **Connecting the Dots**—community foundations are extremely well-positioned to bring a different perspective to the work. Being the connector who has a good overall understanding of the structure of the existing efforts and the value of other institutions can position you to help groups leverage their resources and build ties to support them.

◆ **Grantmaker**—a traditional “tool” in the community foundation toolkit is to make grants to support EITC work. Community foundations have funded both short- and long-term EITC projects:

◆ **Short-term Capacity-Building Projects**—such projects focus primarily on building the

For many community foundations, their EITC-related work changes over time. In the words of one interviewee, “We have to expect things to change. The better we know the field, the more strategic we become.”

capacity of those already offering services. Examples include providing funding to increase marketing capacity, or expanding the number of free tax preparation sites of an existing EITC effort. These very specific efforts can often serve as a good entry point for community foundation engagement. For example,

one community foundation provided funding to bring the Annie E. Casey foundation’s model of “Earn it, Keep it, Grow it” to four local Community Action Partnerships through small grants of \$5,000 to each agency, allowing them to significantly bolster their existing EITC strategies. Yet another community foundation is exploring the possibility of bringing a web-based tool that helps nonprofit service providers to screen families for program eligibility—including screening for EITC eligibility—to their state. Another community foundation has made a grant to their state association of human service organizations—an experienced EITC outreach and free tax preparation provider—to offer on-site technical assistance to newer efforts. This has enabled them to bring EITC and VITA to their service area.

◆ **Long-term Partnerships**—for many community foundations, long-term investments start small but build over time. For example, in one community foundation’s open grant round it received a proposal which noted that there was a

gap in EITC services in the community foundation service area. The foundation made its first EITC grant in 2007—\$18,500 to a local organization that had worked on the EITC in other regions (they also granted \$5,000 in 2008 and 2009). The foundation immediately saw the success in other regions and the value of the return. In subsequent years, the grantee formed a family economic security coalition in the foundation’s service area. Coalition meetings were hosted by the community foundation. In year one the region had one VITA site, which completed 157 returns. By year three the site completed about 900 returns bringing in more than \$1 million in refunds, about \$183,000 of this was the EITC. By growing over a three-year period, the community foundation was able to start the effort and see it come to fruition.

◆ **Evolving Grantmaking**—for many community foundations, their EITC grantmaking evolves and changes over time. For example, one community foundation started by releasing

a Request for Proposals (RFP) asking for a single community partner to administer an EITC program. While this worked at first, the organization that came forward later stalled in the work and gave some of the funding back. In the second year, the community foundation played a different role. They released an RFP to develop a coalition approach. Each of the organizations in the coalition received a grant and was paid for their work on the collective EITC campaign, such as outreach, training, and scheduling. By the third year, it was clear that the program needed a director. At this point, the program

moved into the community foundation in which it is now housed.

What Works?

When building EITC work in your community, there’s no need to reinvent the wheel. There are numerous high quality and effective national and local models. Take a look at what other people are doing and think about how it could work in your community.

◆ **Initiator**—there are times when community foundation staff realize that in order for an initiative to get off the ground, the foundation must initiate the effort and perhaps be prepared to incubate it for some time. For example, in one rural community foundation, the involvement has been very hands-

on. Staff saw that there were no organizations in their community offering EITC outreach and free tax preparation service. Instead of making grants to other organizations, the foundation recruited volunteers—teachers from a local school—and worked in partnership with the already existing AARP Tax-Aide program, which transmitted the tax returns. Next year the foundation hopes to expand the program and become a VITA site. In the future it will probably look for program partners and may make a grant to hire a coordinator. This strategy allowed the work to get off the ground while the search continued for a more permanent home.

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Going from Good to Great

EITC and the Central Indiana Community Foundation

After an initial galvanizing effort in the early 2000s by the Annie E. Casey Foundation, the Central Indiana Community Foundation (CICF) realized the importance of the EITC and has been a partner in the effort ever since. In CICF's community, EITC outreach and free tax preparation had a dramatic beginning, with seven community-based sites offering services across Indianapolis. However, the effort had become focused on one "super-site" by 2005 as a way to



utilize tax prep volunteers efficiently and serve individuals in the community effectively. Working there helped the community foundation go deep with their grantee partners and identify the determinants of success. "We know what makes sense now," said Grants Officer Angela Carr Klitzsch. "We began with lots of autonomous sites and then narrowed to one. Now that we know what makes an effort successful—upfront planning, clear communication and accountability among all partners—we're growing again in a coordinated fashion. Last year we had free tax preparation services at nine community centers." For the last two years, 2008 and 2009, the Indianapolis Foundation, an affiliate of the CICF, has made grants of \$50,000 and \$20,000 respectively to match IRS VITA funding.

Being close to the work has also helped CICF play a convening role in the field—something at which most community foundations excel. In addition to providing grants to fund the EITC and free tax preparation efforts, the foundation also facilitates and drives the Indianapolis Asset Building Coalition, a volunteer coordinating entity comprised of more than 35 financial institutions, community-based organizations, and social service providers working to increase financial literacy services and improve the financial well being of families in Indianapolis.

Step 6—Who are your partners?

For community foundations your choice of partners reflects the communities you serve.

Finding the right partners is important and it may mean looking outside of your usual list of “likely candidates.” What follows is an overview of where other foundations have found successful partnerships, both with community organizations and funders.

Program Partners—community foundations have partnered with a wide range of organizations to implement EITC strategies:

- ◆ **Community-based Organizations**—in most communities, these organizations initiate and maintain EITC outreach and free tax preparation work. Although care has to be taken to find the right partners—in terms of relationships, expertise, credibility, and capacity—community foundations are well-networked in the non-profit community and the EITC provides an opportunity to build on existing partnerships. While every community is different, several organizations are likely to be engaged in EITC work in your community, including:
 - ◆ Community Action Project agencies
 - ◆ Goodwill Industries
 - ◆ United Way
 - ◆ Faith-based organizations
 - ◆ Local nonprofit human service organizations.
- ◆ **Public Schools**—some community foundations also turn to public schools to help play a role in EITC-related work, including providing a site for community tax preparation services, helping with outreach through students, and providing volunteers (students and teachers) to file taxes.
- ◆ **Government**—federal and state agencies, tribal governments, and cities have become active partners in helping more low-income families learn about the EITC and access free tax preparation services.

- ◆ **IRS**—the IRS is a great source of information on local EITC campaigns; they also train volunteers in the certified VITA free tax preparation service. Their website provides a Tax Toolkit, Partner Toolkit, and marketing resources to help launch a campaign.
- ◆ **Colleges**—colleges have played a key role in EITC initiatives in some communities. They have provided student volunteers through accounting and other classes, sites for free tax preparation and, in some communities, evaluation support.
- ◆ **Business**—because of the impact on the financial stability of workers, employers and Chambers of Commerce are increasingly becoming partners in EITC outreach and free tax preparation, including assisting with the distribution of EITC outreach materials and offering space for free tax services.

Funding Partners—community foundations across the country noted the importance of identifying funding partners at the start of the effort. For these foundations, finding funding partners is part of recognizing that their foundation could not support all the work alone. Funding partners also provide greater stability to community partners. Key funding partners suggested by community foundations engaged in EITC include:

◆ **External Funding Partners**

- ◆ **Financial Institutions**—many of those interviewed realized the potential of engaging financial institutions, such as credit unions and banks, in the EITC process. They have played a role as both funding and program partners.
- ◆ **Foundations**—many community foundations have forged relationships with partner charitable foundations, both large and small, to support EITC and free tax preparation efforts. One rural community foundation has reached out to urban funders by participating in their convenings, recognizing that they have access to greater resources. Their caution in this is that once partnerships have been forged, there needs to be careful planning to ensure that rural

EITC Funders Network

Brief #2: Building and Expanding

efforts match with rural needs. They recommend attending each other's meetings, as much as possible, to keep each other in check.

- ❖ **United Way**—because of United Way's presence in communities, they often play a significant role, including funding and hosting EITC efforts.
- ❖ **IRS**—the IRS currently has \$8 million in matching funds available to support VITA sites in communities across the nation. Many community foundations provide funding to match IRS grants.
- ❖ **State Funding**—an increasing number of states are allocating grants to help non-profits engage in EITC outreach activities. For example, in 2007, North Carolina allocated \$50,000 in EITC outreach grants. That grant increased to \$136,000 in 2008-2009.
- ❖ **CDBG**—one community foundation has provided grants to match federal Community Development Block Grant funding to promote EITC outreach.
- ❖ **Unlikely Partners**—you never know who might support your efforts! There are often those unlikely partners that come to the table with specific skills and resources. For example, one community foundation reported that a community organization was not able to donate financially to the effort but provided in-kind support through the provision of translation services for marketing materials for non-English speaking families.



Step 7—What do your colleagues say about initiating and supporting the work?

In initiating and expanding EITC work, community foundation staff across the nation offer much advice, including:

◆ **Work Effectively with Program Partners:**

- ◆ **Understand that the Work Takes Time**—it's important to give grantees time to build the structure needed to do the work—at first, it may be slow—listen to grantees and meet them where they are. Over time they will grow and so will the program. Be prepared for the longer haul so the work can evolve. One community foundation staff member reported, “You need to be respectful in this work. There’s a temptation as a funder to give the money and expect that the work be done yesterday. In this work you have to be careful that the grantees have the structure in place to be successful. It takes time. Each year we meet different partners who are new to the work. Over time we’ve learnt to meet them where they are. To grow the effort from their strengths.”
- ◆ **Plan Carefully**—understand that once a program is launched, it will be difficult to make design changes during the tax season. Help program partners be thoughtful upfront. Make sure that there is clear communication within a coalition, or in any organizational partnership, and that people share an understanding of who will do what. This extends also to host sites, making sure that they understand the magnitude of the work and the time commitment. This will mean thinking carefully about role responsibilities, staffing, and ownership. Establish shared outcome and process objectives, with defined roles. One foundation recommended having a formal agreement with sites—what is required of them and what support will be given—thereby holding the program and funder accountable.
- ◆ **Bring All the Partners Together**—those working on the EITC—community-based organizations, IRS, state governments, banks, busi-

nesses, United Ways, CAP agencies, media and communications organizations, etc.—and funders should come together to craft a plan to reduce duplication and maximize investment. This invitation can also include rural funders going to large urban centers to find partners who want to work in rural areas. Beginning with a focus on maximizing existing efforts will help build sustainability and scalability, facilitate collaboration, and help initiate the sharing of resources.

- ◆ **Empower Local Communities to Make Decisions**—understand that there is a clear difference between building the capacity of other organizations to own the work and doing the work yourself. It is important to understand that even though it may take more time, in the long run it is better to engage community assets and resources in the work. This will help build sustainability from the start.
- ◆ **Use Public Funding First**—if a program receives IRS or other public funding, encourage program partners to spend this money first—it tends to be less flexible than foundation funding. Also be clear about what is reimbursable with IRS grant funding.
- ◆ **Celebrate and Debrief**—as soon as your outreach grant ends and the tax preparation season is over, encourage your grantee to celebrate and honor the volunteers. Also, take the time to debrief with your community partners about how to make improvements immediately following the end of tax season activities.
- ◆ **Use the EITC as Leverage for Other Efforts**—many programs begin with the EITC and then move on to other, more advanced asset-building strategies—Individual Development Accounts, traditional banking opportunities, benefit screenings, financial coaching, etc. In the words of one community foundation staff, “EITC presents an opportunity to connect those coming for help to a variety of other income supports and mainstream banking services. We need to maximize that opportunity, that teachable moment.”

Step 8—What are the challenges?

Of course, initiating EITC and free tax preparation strategies can be complicated.

Community foundation staff shared challenges in an effort to help colleagues avoid these problems in the future. The challenges include:

- ◆ **Communication**—many EITC programs struggle with marketing and getting the word out. Fortunately, there is a growing body of tested outreach materials for you and your community partners to build on (see the Tools and Resources section of this Brief). This extends to recruiting volunteers and also helping people access VITA services. There are many innovative ideas in the field and we have attempted to connect you to some outreach resources in our last section of this brief. In the Tools and Resources section, we reference a couple of places to find good communications tools.
- ◆ **Recruiting and Training Volunteers**—most EITC efforts involve helping low-income people access the EITC through free tax preparation. Free tax preparation demands well-trained volunteers to complete tax returns. Finding, training and maintaining volunteers can be a challenge.
- ◆ **Understanding Cultural Barriers**—for many non-English-speaking families there are additional barriers that prevent them from EITC benefits. These include fears of the IRS and immigration. Community foundation staff noted that programs need to be culturally sensitive and, where possible, outreach materials should use simple language and be provided in languages other than English (where diversity demands it). Additionally, recruiting VITA volunteers that can respond to different language and cultural needs should be a priority in very diverse areas.
- ◆ **Building and Maintaining Trust**—building a robust EITC effort and successful free tax preparation sites involves building relationships and trust—between the funder and the grantee, between collaborators, and between families and those offering EITC services. While there is no silver bullet for building relationships we do know that it takes

time, and a certain perspective. Community foundations are in a good position in this regard to model best practices, build time into processes, connect those working in the field, and serve as neutral conveners.

- ◆ **Capacity Issues**—there are capacity challenges at many levels of the work:
 - ◆ **Community Foundation Capacity**—before getting too deep into the work it is useful to take an honest look at what capacity your community foundation has to initiate and support such efforts, and how best to maximize existing efforts and resources.
 - ◆ **Community Capacity**—in every community there are factors that will limit the potential of EITC efforts. These include struggling with ways to increase the number of people served while maintaining reasonable wait times, targeting appropriate populations and neighborhoods, and finding partners who are responsive, well-dispersed geographically, and competent. Again, every community is different and every EITC effort will be different. Take it slowly. Make time to look at all of your options—all of the possible partners, assets, and resources in your community—and use the EITC to build community leadership and forge partnerships.
- ◆ **Working with Community Partners**—of course, there are numerous challenges here. Community foundation staff stressed the following to help avoid and overcome them:
 - ◆ **Finding Solid Partners**—working at a community foundation gives a good perspective from which to evaluate potential partners. It may mean taking an honest look at potential partners to assess their capacities and capabilities: Are they well connected? Do they have sufficient local knowledge to pull the work off? Do they have a good track record of working with others? Are they trusted in the community? Do they have the staff capacity to take on extra work? Do they have knowledge of other funding streams and the ability to scale-up the work in the future? Does the EITC easily fit with their mission? Do they have the technical expertise needed to train volunteers? One small rural

community foundation also has struggled with competition among potential community partners. While it had no clear solution to this, it is best to be aware that this can be a challenge.

❖ **Ensuring Partners Are Clear About Their Needs**—this challenge was mentioned by the staff of one community foundation that has moved to asset-building work. They have struggled to meet the recognition and partnership expectations of various community organizations, such as banks. Their advice is to go into these situations with your eyes open—to be upfront about what makes a successful partnership with each partner organization and how they want to be recognized.

❖ **Balancing Leadership and Ownership**—although a community foundation will want to play a significant role, you need to balance the leadership and ownership of the program. While the foundation should help lead the program by building it, the community ultimately should “own” the program. There is a danger if the community views the community foundation as the owner.

Looking Ahead

Although the community foundation staff members collectively had a great deal of wisdom to share, there are some issues with which they even struggle. These issues are not new to the field:

- **Finding Systemic Solutions**—a number of years ago a community foundation staff member asked, “Why can’t people just get an automatic EITC refund?” While this is not a possibility at this time, there is an underlying question here around policy options that would make a difference to large numbers of people, and the power of community foundations to play a significant part in these processes. Community foundation colleagues are interested in exploring systemic strategies in the EITC field.
- **Evaluation**—this is critical. However, the data that can best tell us about progress in helping more low-income families access the EITC (essentially data from the IRS) lags far behind. This inhibits the ability of foundations to really know whether they are moving the dial. And, as we are all struggling to evaluate our efforts, there is a sense that foundation staff nationwide spend hours creating evaluation models for EITC programming. Wouldn’t it make life easier if we shared these resources?

Over the next year the EITC Funders Network would like to host a series of conversations on these issues. If you would like to continue the dialog and work together toward answers to these issues, please contact us at info@eitcfunders.org.

Tools and Resources

The EITC field has a robust information network that helps foundations and groups interested in the work to learn more and use model practices. A few key resources include:

Finding Collaborators and Learning About Models

National Community Tax Coalition

www.tax-coalition.org

The National Community Tax Coalition seeks to improve the economic well being of low- and moderate-income individuals, families, and communities by building a movement to dramatically increase access to tax credits and benefits and asset-building opportunities. The coalition's website offers many practical resources, as well as a program locator to help you figure out which organizations provide EITC and free tax preparation services in your area.

Volunteer Income Tax Assistance Program (VITA)

www.eitc.irs.gov

The VITA Program offers free tax help to low- to moderate-income people (generally earning \$49,000 a year and below) who cannot prepare their own tax returns. Certified volunteers sponsored by various organizations receive training to help prepare basic tax returns in communities across the country. VITA sites are generally in community and neighborhood centers, libraries, schools, shopping malls, and other locations. Most locations also offer free electronic filing. To locate the nearest VITA site, call 1-800-829-1040. The IRS also offers the Tax Counseling for the Elderly Program which provides free tax help to people age 60 and older. Similar to VITA, trained volunteers from non-profit organizations provide free tax counseling and basic income tax return preparation for senior citizens.

AARP Tax-Aide

www.aarp.org

The AARP's stated mission is to enhance the quality of life for all as we age, leading positive social change and delivering value to members through information, advocacy and service. The organization offers free tax preparation services in many communities nationwide. As part of the IRS-sponsored Tax Counseling for the Elderly Program, about 34,600 AARP Tax-Aide volunteers, trained in cooperation with the IRS, now help more than 2.6 million taxpayers file their federal, state, and local tax returns each year. AARP offers the program at about 6,500 locations nationwide in senior centers, libraries, community centers, and other locations.

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More than 200 national, regional, local, corporate, and family foundations participate in the EITC Funders Network. While many of its participants are traditional charitable foundations, some are United Way chapters or government entities. The Network's members explore and support a variety of aspects of the EITC field, including national and state policy, free tax preparation, and links between the EITC and other supports for low-wage workers. The Network helps charitable foundations learn about the field, make connections to funder colleagues, and shape new strategies.

Visit the EITC Funders Network website at **www.eitcfunders.org** to become a member of the EITC Funders Network (participation is free), visit our community foundation web resources page and learn about the work of other community foundations who can be a resource to you as you build and develop EITC strategies in your community.

Building the Compelling EITC Case for Your Community

The Brookings Institution

www.brookings.edu/metro/EITC/EITC-Data.aspx

The Brookings Institution's mission is to conduct high-quality, independent research and, based on that research, to provide innovative, practical recommendations that advance three broad goals: strengthen American democracy; foster the economic and social welfare, security, and opportunity of all Americans; and secure a more open, safe, prosperous, and cooperative international system. Its website offers substantial data resources to help communities customize and maximize their EITC and free tax preparation strategies. Knowing the data on tax filers in your community can help with targeting, goal-setting, and outreach. Data posted on Brookings' website can be used to:

- ◆ Explore tax return data from 1997 to 2006—the 2007 data will be available in early 2010.
- ◆ Explore data within a geographic area—based on zip code data from the IRS. The website presents data at different geographic levels—zip area, town or city, county, metro area, and state. A new feature is the addition of state legislative districts (both upper and lower chambers) and congressional districts.
- ◆ Once the geographic area has been selected, the data set is chosen. You can choose data on all tax filers or EITC filers and choose which variables to view. Options include EITC filers, new filers, returns with refund products, and other characteristics.

Outreach Tools

The Center on Budget and Policy Priorities

<http://eitcoutreach.org/category/outreach-tools>

For nearly 20 years, the Center on Budget and Policy Priorities (CBPP) EITC Outreach Campaign, which includes community organizations, employers, social service programs, and government agencies, has promoted the Earned Income Tax Credit, the Child Tax Credit, and free tax-filing assistance for low- and moderate-income workers. Each year, CBPP makes available a substantial EITC Outreach Toolkit. This Toolkit contains sample fliers, brochures (in many languages), and a step-by-step guide on conducting effective EITC outreach.

The Hatcher Group

www.thehatchergroup.com/EITCoutreach.html

The National Community Tax Coalition (NCTC) and The Hatcher Group have come together to raise awareness of the EITC, the importance of VITA sites, and the need to build support for EITC benefit expansions, and program funding increases. They have produced two companion toolkits—one for advocates and one for elected officials. Included in the guides are EITC outreach ideas and template materials, such as site visit invitations, press releases, and opinion-editorials. The toolkits are also full of EITC data and resource materials to help make a compelling argument.

Lessons Learned

The Annie E. Casey Foundation

www.aecf.org/KnowledgeCenter/Publications.aspx?pubguid={8E322899-C9F2-4CB0-8C4E-7F1CCB98917C}

Since 2003, the Annie E. Casey Foundation has worked with foundations, nonprofit groups and others on efforts to increase EITC participation. The Casey Foundation has supported EITC outreach and tax preparation campaigns in urban, rural, and Native American communities. In 2006, Casey-affiliated sites around the country prepared more than 223,000 tax returns, nearly all of them at no cost to the family. Casey has prepared a "lesson learned" report based on their considerable experience in the field.

The EITC Funders Network would like to thank staff of the following community foundations who generously gave their time and expertise to inform and shape the Briefs.

Arizona Community Foundation

Barry Community Foundation

Blue Mountain Community Foundation

Central Indiana Community Foundation

Community Foundation of Greater South Wood County

Connecticut Community Foundation

Erie Community Foundation

Fairfield County Community Foundation

Greater Milwaukee Foundation

Stark Community Foundation

The Community Foundation for the Greater Capital Region

The Community Foundation of South Alabama

Triangle Community Foundation

West Central Initiative

Wyoming Community Foundation

This Brief was co-authored by Ami Nagle and Sarah Griffiths of the EITC Funders Network.

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