

Virtual Training Series

Developing Partnerships to Expand Outreach

Center on Budget & Policy Priorities

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The Get It Back Campaign

- National effort to connect eligible workers to tax benefits
- Promote the Earned Income Tax Credit, the Child Tax Credit, free tax preparation, and other tax benefits
- Work with a network of diverse partners
- Provide outreach tools, trainings, and resources to help you link eligible workers to the tax credits and free tax help

www.eitcoutreach.org

Virtual Training Series

- Features the expertise of campaign partners in the field
- Focuses on specific outreach strategies and skills that you can begin to apply to your work immediately



Why Focus on Partnerships?

- Creating meaningful partnerships can be challenging
- Essential to effective VITA and tax credit outreach efforts



Benefits of Partnerships

1. Increase your reach and exposure
2. Expand available resources
3. Spark creativity and new ideas



Our Presenters

Stephen Black

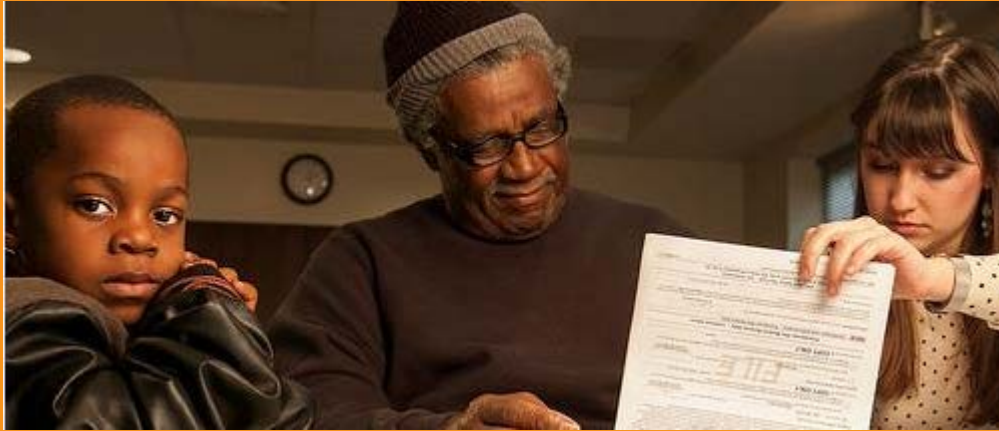


Brenda Brame



Logan Jones





IMPACT
AMERICA

Partnering with Universities and Colleges

Initiating Partnerships





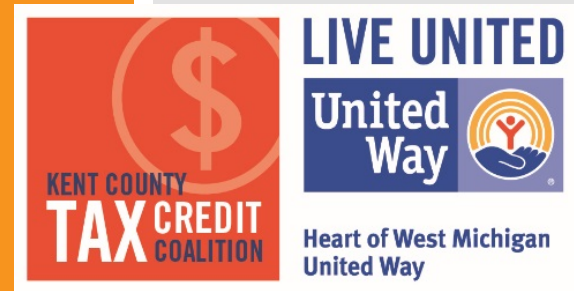
Partnerships overview

Maintaining relationships



VITA & Banks

A Wonderful Partnership





Meeting of the minds

Mayor and nonprofit Executive Director invited banks to a lunch meeting.

- CRA benefits

Partnership overview

Benefits

- VITA (volunteers and some funding)
- Banks (access to unbanked or underbanked)
- Collaborate on some asset building workshops/events (Show Me the Money, Minding Your Money, In School Banks and the Ebus)





LIVE UNITED



Heart of West Michigan
United Way

Maintaining the relationship

- Invite banks to your Coalition table (share the vision and benefits of having a voice at that table)
- Keep them updated (events, reports and/or volunteer needs)
- Send an end of season report to your CRA representative
- Email them just to say hello; take an interest in them
- Get to know them and you will know what works and what doesn't



Systems of support

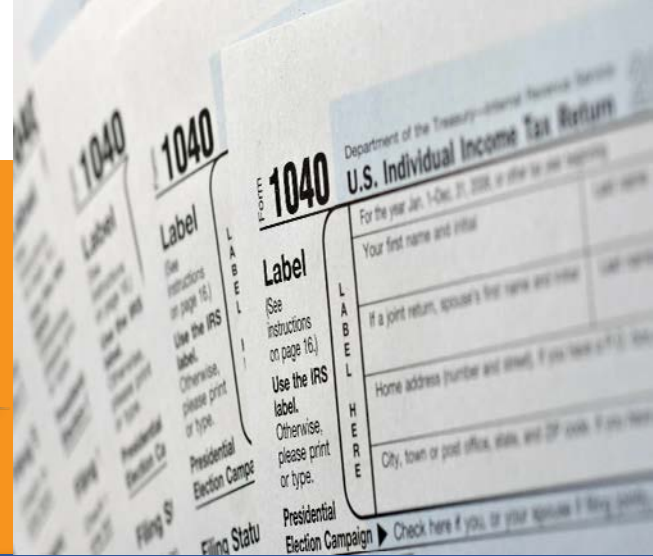
- Be open to doing things out of the box (i.e. the Ebus)
- Be flexible with your volunteer training (you might get more volunteers)

What works and addressing challenges

- Funding
- Training



VITA
VOLUNTEER INCOME TAX ASSISTANCE



workLife
PARTNERSHIP

Partnering with the business community



Overview of WorkLife Partnership

- Employee retention model that connects directly with the working population of the businesses we serve.
- Overcoming barriers and providing access to/direct service in financial health, up-skilling, mental health, rental/deposit assistance, home buyer classes, legal services, etc.

Wages needed for an adult w/ a preschooler to be self-sufficient

Denver County \$22.69/hr

Larimer County \$22.04/hr

Weld County \$19.82/hr

70%

of the new jobs being created in Colorado pay less than \$36,000 a year

Cost of Absenteeism

\$3,600

Per employee per year due to unscheduled absences

Cost of High Turnover

20-25%

Of employee's fully-burdened salary in replacement costs

Cost of Low Employee Engagement

20%

Per employee loss in productivity and profitability potential

Our Partners for VITA 2016



Our Denver-based partner

Together, we served 11 businesses in Metro Denver

98 returns prepared; 63% increase over 2016

Traditional site visits in February and March; Valet service used as backup

2 staff members, 1 board member and 4 volunteers

Partnership formed largely by chance encounter at a financial services summit



Our Larimer County-based partner

Served 6 businesses in Fort Collins/Loveland

127 returns prepared; 119% increase over 2016

Traditional site visits, one each in February and March; Valet service offered if needed

1 staff member and 3 volunteers

Columbine Health Services joined WorkLife Partnership and the relationship with MakeChange NOCO was reestablished



The Round-Up

Engaging New Employer Members

How to get business members onboard?

WorkLife Outreach

- Built in offer for any new WorkLife employer member
- Pilot programs are eligible, should they choose to participate
- Health and wellness fairs
- Existing relationships with nonprofits the business partners with or funds
- Corporate/community collaborations
- Existing business members advocate

The Sales Pitch

- Fortunately the service largely explains/sells itself, the trick is in the execution
- Cost of filing a return with a paid preparer vs. a worker's paycheck
- Appeals to businesses who want to offer another benefit for lower-income/front-line workers.

Benefits for Both



Strengths

- Connect with a population that cannot readily access tax clinics that operate during the day or evening walk-in clinics
- Very visible and memorable service for both the taxpayer and the businesses
- Overall, the returns of working families are simpler than retired folks and can be completed faster
- Word of mouth advertising is very strong, employees remember the service and often refer fellow employees
- Employers provide access to printers and paper. We made use of flash drives to cut down on costs and hauling equipment.
- Appointment based scheduling via *Sign Up Genius* allows us to control volume and conduct pre-intakes

Benefits for Both



Challenges

- Businesses often reserve inadequate sized rooms
- No-show rate is approximately 50% during March
- Volunteer recruitment is difficult without a strong relationship to the individual and our organization
- Employees often forget SSN and direct deposit info
- Walk-ins still occur and taxpayers frequently show up 30 minutes early
- Colorado has only 2 IRS offices remaining

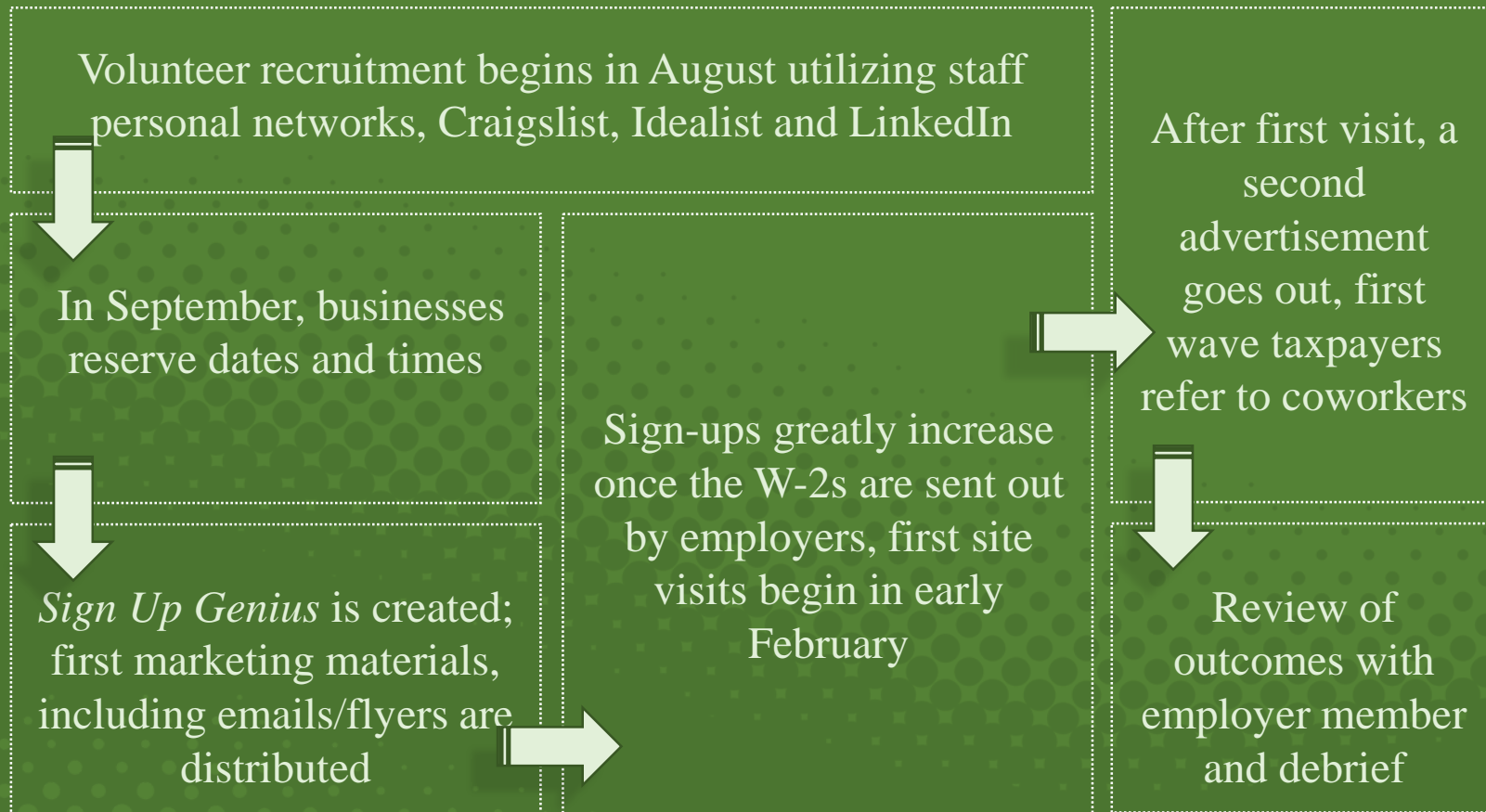
Benefits for Both



Opportunities

- HR/Supervisor buy in leads to some of the best advertising and outreach
- Employees have little understanding of their withholdings and W-4s
- Pre-season tax Q&A and training sessions at employers as early as the summer
- Taxpayers depend on us for healthcare/tax reform updates
- Clear up confusion on the documents to be signed and kept
- Improving Valet system and security
- Year-long tax clinic in northern Colorado

Our Approach to Outreach



Working/Communicating w/ Employers

Employers can make excellent VITA partners but do require more legwork and relationship maintenance. Pick 1-3 HR champions and offer education/training ahead of the season, connect via LinkedIn, attend to their events. Share aggregate data if possible.



Lessons learned over the past 3 years

- Avoid IRS/VITA lingo!
- Avoid assumptions and assigning of intent
- Be very clear with the desired room, physically visit the location shortly after reservation
- Make sure the Wi-Fi is password secured and have the password ahead of time or contact info of the tech person and reach out to them before the visit
- Ask for opportunities to get in front of staff
- Site coordinator or veteran volunteer should act as the main contact AND BE ONSITE during the tax preparation
- Arrive at least an hour early
- Keep the language centered around what you need for the employees
 - “This is the best way to serve employees”
 - “We can handle employees more efficiently with...”

Thank You for Joining!

Stay Connected

- Website: www.eitcoutreach.org
- Blog: www.eitcoutreach.org/blog
- Facebook: www.facebook.com/getitbackcampaign
- Tax Credit Outreach News: <http://eepurl.com/bo6ra5>
- Email: eitcoutreach@cbpp.org

