



Welfare Peer Technical Assistance Network

Peer Technical Assistance (TA) Summary

Requesting Agency:	Virginia Community Action Partnership Virginia Department of Social Services
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TA Event:	117
TA Requested:	The Virginia Community Action Partnership (VACAP) with the Virginia Department of Social Services requested assistance of the Welfare Peer Technical Assistance Network in planning a two-day roundtable event to further develop and continue the Virginia EITC Initiative that is currently underway.
TA Goal:	The goals of the meeting included working with partners in varying localities and understanding and addressing the challenges each faces to educate and encourage the use of the free tax prep vs. paid preparers, volunteer recruitment, partnership buy-in, and sustainability.
TA Format:	Roundtable
Sample Evaluations:	<p>Evaluations from the event suggest that participants strongly agreed that the Roundtable event was a huge success and very helpful as a catalyst for the State's EITC efforts. Selected highlights from the evaluations include:</p> <p>"This was very wonderful, lots of inspiration for ideas for me to share with my community.</p> <p>"Great examples and motivation for planning and implementing a tax coalition."</p> <p>"Felt it was very informative to provide a better program next year. Feel these session should be held annually to recruit additional VITA sites throughout Virginia."</p> <p>"Great info, excellent speakers, very thorough, useful info."</p> <p>"It was good to be made aware of all the ways of approaching the public and attracting clients."</p>

Analysis:

The Earned Income Tax Credit (EITC) has been instrumental in closing the poverty gap for many of the nation's working poor. Enacted by Congress in 1975, the Federal EITC is a refundable tax credit that increases the income of low-and moderate-income working families by providing tax reductions and cash supplements. As a Federally-funded anti-poverty initiative, the primary purpose of the EITC is to help employed low wage earners maintain their financial self-sufficiency by offsetting taxes, supplementing wages, and making work more attractive than welfare.

The Roundtable event in Virginia was attended by Federal agency staff, representatives from the Virginia Department of Social Services and Virginia community action agencies, and local representatives from the various service regions throughout the State, including the United Way, local Community Action Agencies, Head Start, and SunTrust Bank. Overall, the Roundtable was designed to assist existing coalitions to promote EITC through education, foster peer-to-peer learning, highlight best practices on EITC outreach, promote financial literacy outreach, provide helpful tools for launching an EITC campaign, and facilitate the development of local and regional action plans for immediate implementation.

The Roundtable included comprehensive information sharing related to the EITC. Roundtable participants were offered numerous presentations detailing the purpose of, and eligibility for, the EITC, unclaimed benefit totals from FY 2004, why TANF recipients are a good target audience for an EITC initiative, and examples of EITC Initiatives from other localities. Additionally, Federal Internal Revenue Service (IRS) staff presented on the various aspects of Volunteer Income Tax Assistance (VITA) sites, the IRS rural outreach initiative, and other helpful resources available from the IRS such as TaxWise software. In addition, a representative from Corporate Voices offered a presentation on engaging employers in EITC initiatives, and a representative from the Federal Deposit Insurance Corporation (FDIC) discussed the Money Smart curriculum and other financial literacy resources. Also included were presentations by a local representative from the State of Oklahoma on mobile rural tax preparation and from the Nehemiah Gateway Community Development Corporation in the state of Delaware on empowering families through financial literacy.

Additionally, networking sessions also afforded participants the opportunity to leverage the Roundtable as a catalyst for a coordinated Statewide EITC campaign among stakeholders in urban and rural Virginia.

Overall, participants, speakers, and facilitators agreed that the Roundtable was a resounding success that helped to build the statewide and local capacity for Virginia to organize local initiatives, access resources, and develop collaborative partnerships related to the EITC.

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