THE WELFARE PEER TA NETWORK
Office of Family Assistance

FINAL REPORT of Peer TA Activity # 145

Welfare Peer Technical Assistance Roundtable

Strengthening Economic Self-Sufficiency for Idaho Families

Boise, Idaho
May 9 – 10, 2007

Prepared by:

Jacqueline Thomas, Project Director

TABLE OF CONTENTS

Page

I. EVENT OVERVIEW……..…….….…4

II. ROUNDTABLE BACKGROUND…….……..…….5

III. ROUNDTABLE SESSIONS……..……....5-6

1. Welcome and Introduction……..…….…..…...6

2. Achieving Financial Self-Sufficiency for Low Wage Earners and TANF Clients……7

3. A Shared EITC Commitment……..……7-9

4. EITC Program and SPEC Resources to Support Local Community Initiatives……..…...9
   a. Sharing information
   b. Free tax return filing
   c. Asset-building and financial management

5. Dynamics of Expanding EITC Outreach Partnerships in Rural Communities……..……10

6. Key Initiatives: Working Coalitions and Partnerships in Idaho……..…...10

7. Strategies For Developing Community Coalitions and Partnerships……..….…..10

IV. PARTNERSHIPS TO BUILD STRONG FAMILIES, FINANCIAL SELF-SUFFICIENCY AND SELF DETERMINATION……..11

a. Business Leader Recognition…….…….12

TABLE OF CONTENTS (CONT.)

Page

V. MUNICIPAL AND RURAL COMMUNITY OUTREACH PLANNING SESSIONS…….……..13

VI. TARGETED OUTREACH FOR LOW INCOME FAMILIES……..……..13

VII. ASSET BUILDING AND FINANCIAL SELF-SUFFICIENCY: PROGRAMS AND RESOURCES…..…14

VIII. EMPOWERMENT THROUGH FINANCIAL LITERACY……..….……..14

IX. TAX WISE AND EITC……...…….15

X. SCALE AND SUSTAINABILITY……..…….…….....15

XI. ACTION PLANNING AND BUILIDING THE LOCAL CAMPAIGN……..…….….16-19

XII. CLOSING REMARKS AND EVALUATION…….…….…..19

I. EVENT OVERVIEW

The Welfare Peer Technical Assistance (TA) Network is a Federally funded initiative sponsored by the Administration for Children and Families (ACF) Office of Family Assistance (OFA) within the U.S. Department of Health and Human Services. The purpose of Welfare Peer TA is to provide peer-to-peer technical assistance to public agencies and private organizations operating the Temporary Assistance to Needy Families (TANF) programs. Welfare Peer TA facilitates the sharing of information between and among States and localities to establish linkages between organizations serving the needs of welfare recipients.

Federal staff in attendance included representatives from the Internal Revenue Service (IRS) and the U.S. Department of Health and Human Services (DHHS), Administration for Children and Families (ACF), Office of Family Assistance (OFA). The Idaho Department of Health and Welfare sent various levels of staff and various community action organizations were represented.. The Roundtable event focused on discussions about the EITC in general, EITC eligibility, financial literacy, best practices on EITC outreach and free tax preparation from around the country, helpful tips and tools for launching an EITC outreach initiative, and developing local action plans for EITC and volunteer tax preparation initiatives.

As a result of this Roundtable, participants gained the following:

- An increased appreciation for the EITC and the impact it can have on the economy of local communities
- A heightened awareness of the amount of unclaimed EITC dollars in Idaho
- An increased awareness about the need to target TANF and former TANF participants who have not claimed the EITC even though they are eligible
- A richer understanding of the tools that are currently available to assist in EITC outreach and volunteer tax preparation, such as toolkits, Web sites, training materials, and outreach material
- An ability to use Tax Wise, the tax preparation software of the IRS
- An increased recognition of the importance of financial literacy and the tools that are currently available to support the advancement of financial literacy
- Examples from model programs, EITC initiatives, and volunteer tax preparation initiatives currently occurring around the country, and
- The opportunity to collaborate with local stakeholders and formulate local action plans for each of the service regions in Idaho.

Lisa Washington-Thomas served as the Federal Project officer for the DHHS, OFA, and Welfare Peer TA Network. Logistical support on behalf of the Welfare Peer TA Network was provided by Jacqueline Thomas, Project Director at the Dixon Group (contractor). The event Facilitator and project lead was David Cunningham, Consultant on the EITC and Self-Sufficiency Initiatives for the DHHS, OFA, ACF (contractor).

II. ROUNDTABLE BACKGROUND

In recent years large numbers of TANF clients have entered the workforce and moved off of welfare. However, securing employment does not always equate to getting out of poverty. Many former TANF recipients earn annualized wages that still leave them below the poverty line. Many TANF clients are eligible for the Earned Income Tax Credit (EITC), however, many do not claim the EITC for a number of reasons.

The 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.

To expand TANF client and community awareness and participation in federal tax credit programs such as the EITC, the state of Idaho requested technical assistance from the Welfare Peer Technical Assistance Network. The Community Action Partnership Association (CAPA) of Idaho contacted Welfare Peer TA regarding the delivery of a coordinated Statewide EITC initiative. The CAPA sought to bring in outside resources to continue Idaho's efforts to educate community partners regarding the benefits of the EITC for Idaho's working poor and to continue to increase the effectiveness of the existing State EITC campaign.

In response to the TA request from Idaho, the Welfare Peer TA Network planned, designed, and implemented a Roundtable event that was held on May 9-10, 2007 in Boise, Idaho. Approximately 52 individuals representing a wide variety of Federal, State, and local agencies and organizations attended the Roundtable. The event was designed to impart knowledge about the EITC, foster peer-to-peer learning, highlight best practices on EITC outreach and free tax preparation from around the country, provide helpful tools for launching an EITC campaign, and facilitate the development of local and regional action plans for immediate implementation.

The following report describes the Roundtable event that was designed to meet the needs articulated in Idaho's request for technical assistance.

III. ROUNDTABLE SESSIONS

1. Welcome and Introduction

The first day of this day and a half event began with five speakers who welcomed Roundtable participants and provided an overview of the purpose, goals and anticipated outcomes of this event.

James Butler, Program Specialist for the Office of Family Assistance, Health and Human Services, welcomed participants to this event. Mr. Butler discussed the great strides the EITC has accomplished and the strategies used to help TANF families move toward self-sufficiency. He also expressed confidence in the ability of the event to foster a collaborative atmosphere. Mr. Butler also thanked all those responsible for putting together and delivering this Roundtable event, and introduced each of the following speakers during the session.

The Honorable Elfrida Higgins, Councilmember from Garden City, welcomed all of the participants to the Roundtable. She stressed the importance of utilizing the EITC not only for the local community but for the state as well. Councilmember Higgins hopes the information garnered from this event and subsequent action planning helps low wage families in Idaho move forward and obtain self-sufficiency.

Greg Kunz, Deputy Administrator for the Division of Welfare Administration at the Idaho Department of Health and Welfare expressed excitement for the timing of this event and believes this event will inspire the change in attitude and behavior the event participants want to see happen. As an employee of the largest state department in Idaho, Mr. Kunz believes everyone can be brought together by the common goal of making lives better for Idahoans.

Carol Barnett, Director of Product and Partnership Development for the IRS in Atlanta, Georgia expressed happiness at being in Idaho and participating in the event. She has traveled extensively around the country on behalf of the IRS to meet with community organizations. Ms. Barnett discussed the common bond shared by the IRS and Idaho; working with TANF, rural and special populations. The IRS' Wage and Investment Division has processed over 118 million tax returns, many are low wage, and she is confident the IRS can provide resources and knowledge to assist with Idaho's statewide strategy for engaging low income individuals with the EITC.

Mary Chant, Executive Director for the Community Action Partnership thanked all for coming and supporting communities and self-sufficiency goals for Idaho families. Ms. Chant submitted the request for this event to the Welfare Peer Technical Assistance Network. She is committed to helping fellow Idahoan build assets and income as they move out of poverty. She believes the EITC is the way to accomplish this goal and hopes to leave the conference with qualitative next steps.

2. Achieving Financial Self-Sufficiency for Low Wage Earners and TANF Clients

Financial self-sufficiency for low wage earners and TANF clients requires a concerted effort by the State, Community Action agencies, the IRS and the wage earner to achieve financial independence. Idaho is already making a difference through the use of initiatives such as the 2-1-1 CareLine and networked support

services that enable families to move toward financial independence and self-sufficiency.

Greg Kunz, Deputy Administrator, Division of Welfare Administration (DHW), Idaho Department of Health and Welfare believes strategies for creating dynamic outreach opportunities to promote the Earned Income Tax Credit (EITC) and Child Tax Credits (CTC) programs will help to promote self-sufficiency ideals. Employers, business leaders, local government and community organizations work together to create partnerships designed to contribute to the growth of the local economy.

Idaho has one of the lowest caseloads in the nation. Most of this caseload is child-only with relative caregivers. Mr. Kunz is concerned that Idaho has not done enough in past times to help Idaho families become more self reliant and achieve self sufficiency. He has identified three strategic areas that, once addressed, will promote self-sufficiency goals:

- Partnerships
- Access, and
- Education

The state agency cannot achieve these goals alone. The first element of the strategic plan is to create partnership agreements. The department has invested in navigators in offices throughout the State. These navigators are tasked with helping individuals locate resources that are beneficial to their circumstances. In addition, service delivery can be strengthened in ways that generate public knowledge. The second element of the strategic plan is Access. The challenge is to remove some of the traditional barriers and expand access to services. The third element is education. What educational tools work best? How can information be shared across venues? Can we do a better job of educating and sharing information? How it is received and understood and how do we translate this information into action? Will families actually find themselves in a better place, will they reach a higher level of self-sufficiency? DHW is committed to providing resources to address and accomplish these goals. 350,000 Idahoans receive services from DHW yearly. This group is comprised of TANF recipients, low wage earners and senior citizens. Education and marketing to this group will have a huge impact on the success or failure of the EITC promotion.

3. A Shared EITC Commitment

There is the potential for $198 million dollars in EITC funds to be returned to Idaho as a direct result of EITC participation. However, 52% of qualified individuals are not claiming it. This computes to $35 million not being returned to Idaho. According to the Idaho Care line, individuals require resources to move transition from TANF and into workforce. 25% of the nation's workforce lives paycheck to paycheck. Surveys indicated that nationwide only 30% of qualified

individuals are claiming the EITC. This is of critical concern. How do we change this negative into a positive?

A tremendous effort to market and improve outreach for the EITC is currently in the works. Those efforts include reviewing best practices from other states. Pilot states with well managed EITC programs include:

- Jacksonville, Florida
- Benton Harbor, Michigan
- Houston, Texas and
- Waco, Texas

In Jacksonville, the mayor championed an EITC outreach effort and appointed a committee of business leaders. They have a coalition to include employers, and a strong network of local community agencies working together. The faith-based community also conducted special outreach in the Hispanic community which produced a significant uptake in EITC.

Benton Harbor focused on TANF clients and special outreach. 84% of its eligible candidates filed for the EITC- as opposed to 48%. The critically important element was strategy- targeted advertising.

In Houston, a special effort was made to promote the EITC within the minority communities. Houston's strategy involved targeted outreach to small businesses, utilizing the Louisiana walker-talker program, which was a New Orleans pre-Katrina pilot, to get the message out. A special advertising campaign late in the season encouraged people to file taxes. In addition, faith-based leaders were instrumental in getting the message out.

In Waco, the Mayor became involved in the EITC education process. The faith-based community and employers were targeted to get the message across. The big question became, "Who is the key person to get the message to the communities." The CEO of Providence Hospital emerged as an employer to lead the EITC initiative. Out of approximately 1800 hospital employees, 1100 qualified for the EITC. Their strategy included employee workshops and website information on the EITC. The CEO took the message statewide and challenged other hospitals around the state to increase their EITC participation. As an added incentive, the state pledged money for regional outreach efforts.

People are ready to hear the message about the EITC, but the mediums to make it work must be in place. Many organizations are interested in helping poor people - but the message to convey is to help low-wage earners. This gets employers invested by changing mechanisms, strategies and methodologies.

Coalitions and partnerships also work. Idaho has $35 million dollars waiting to assist low income wage earners to keep some of what they have earned. The

Welfare Peer TA event embraces strategies not just for poor people, but for hard working Americans in Idaho communities. Strategic practices highlighted from around the country will ensure more Idahoans bring home the EITC.

4. EITC Program and SPEC Resources to Support Local Community Initiatives

Barbara Sowder, Territory Manager for the IRS in the Portland area likens the EITC to that of the largest anti-poverty program in the country. The largest benefit of the EITC is distributed to working families. In 2005, the program returned 41 billion to families nationwide, with an average credit of 1600 per family returned to the community. The money stays in the communities! Part of the IRS' mission is to educate taxpayers about the tax benefits that they are entitled to and this involves outreach activities geared toward the EITC and CTC, volunteer programs and electronic filing. EITC outreach has not been as successful as the IRS would have liked. They have tried numerous ways to get the message out. They have figured out that they need to change the way that they are working with tax payers and change the way that they are operating. Research has determined the main reason for a low success rate is that people don't trust the IRS. As a result, six years ago the IRS began making a change. In an effort to garner trust, the IRS is now focusing on the following three initiatives:

a. Sharing information:

The IRS has been working with children in free school lunch programs. In rural areas, there is a 38% difference in the number of houses filing for the EITC and those in lunch programs. Boise has about an 18% difference. A lot of people don't file tax returns, which is another way to get money back into community. If they file the tax return and don't get the credit, the IRS will send a letter asking if they knew they were qualified. It is rewarding to work with taxpayers and teach them about the credit, potential refunds and money in arrears for the previous three years.

b. Free tax return filing:

The IRS seeks to recruit volunteers and open sites to help people file tax returns. These sites are known as Volunteer Income Tax Assistance (VITA) sites. Any individual comfortable with numbers and computers can volunteer. Idaho currently has 79 sites.

c. Asset-building and financial management:

Many businesses have workers that qualify for CTC and EITC. This money helps families and the money is returned to the community. Customers with money spend money. The IRS is lending its expertise to help facilitate the use of VITA sites. When the IRS initiates a tax site, they provide training. There are ten community coalitions working around EITC outreach and conducting free tax preparation throughout the Washington, Oregon, and Idaho areas. During the last tax year in Idaho, the IRS prepared 17,000 returns at VITA sites, 95% electronic refunds, all available within 10 days if person had bank account. This equates to an

18% return back into the community; 5.5 million was EITC and 4 million was CTC. 3.3 million dollars was saved in Idaho for residents because VITA sites were used instead of paid tax preparers.

5. Dynamics of Expanding EITC Outreach Partnerships in Rural Communities

Two years ago Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships, National Coordinator Stakeholder Partnerships, Education and Communication and Rural Strategy for the IRS started a committee to establish partnerships to disseminate information to rural populations and build a statewide rural EITC coalition. State by state foundations began and evolved into pilot programs. 20 pilot programs began in 30 states. The first major hurdle was defining a rural area. The second was acknowledging that one size won't fit all for the country. Strategies were revised and the partnership organizations began working with state social service agencies, the USDA extension service and other communities, to champion the cause. Six states now see the value of working in rural areas and have rural coalitions. They move slowly but progress is being made!

6. Key Initiatives: Working Coalitions and Partnerships in Idaho

It is challenging to serve different locations in the state of Idaho because of its size. Donna Weddle, Senior Tax Specialist with the IRS, highlights successful initiatives to provide EITC/CTC outreach and Volunteer Income Tax Assistance (VITA) services for former TANF clients and low wage earners in Idaho. Ms. Weddle is confident Idaho, community organizations and the IRS can work creatively to insure the message is received in rural areas. Community and partnership organizations include:

- Partners for Prosperity with initiatives throughout the state to develop future leaders, IDA's and an EITC campaign. Their holistic approach is highlighted in special projects.
- The 211 care line's initial screening and referral services contribute to the overall impact statewide.
- The Coalition for Economic Improvement performs outreach services and is open six days a week to provide free tax preparation services
- Tiffany Braughn of the Moscow Community Action Partnership operates a two staff member office that provides tax preparation services, completing thirty three tax returns for the year and funneling $52,000 back in the community.

7. Strategies For Developing Community Coalitions and Partnerships

Business leaders and local government recognize the importance of supporting the EITC and other asset building resources. Employers, financial leaders and municipal networks are important partners in promoting the development of community based, regional and statewide outreach activities on the EITC, CTC

and Individual Development Accounts (IDAs). Organizations and individuals that embrace EITC and provide services in support of the EITC include the following:

- Partners for Prosperity, focuses on education, empowerment, and economic development. The EITC fits into their mission using research to target needed services in the community. Strategic planning skills are important when developing a coalition. The core group must include an IRS representative knowledgeable about the EITC and VITA, state and local government support, community action partnerships, faith based organizations, and utility companies are great resources.

- The Coalition for Economic Improvement was founded to prevent duplication of effort. Their mission is to provide free tax preparation and provide information about financial literacy and predatory lending. Located in Boise and Canyon County, both of which are accessible via public transportation, they use AARP senior volunteers as resources. Partners include United Way, 211, Catholic Charities, and banking and non profit agencies.

- Catholic Charities uses an integrated approach to spread the word. Their mission is to provide service and justice through delivery of quality social services, advocacy for social justice and collaboration with other organizations to solve social justice issues. They use senior services to build self-sufficiency in seniors, and stress early learning so their children are also involved in financial literacy. Marcia Munden, Volunteer Coordinator for Catholic Charities highlighted some of Catholic Charities collaborative efforts:

    1. LAPES- Literacy As a Pathway to Economic Stability
        a. Supporting families in Idaho
    2. Idaho Dads Matter
        a. Brings all of same program to bear with partnerships with Health and Welfare to improve the circumstances for non-custodial parents to have a role in lives of children.

Ms. Munden stressed that the most important mechanism in collaborative efforts is to conduct a community needs assessment, identify partners, and utilize community leaders in the community. New partners are key to sustainability and offer a fresh perspective.

IV. PARTNERSHIPS TO BUILD STRONG FAMILIES, FINANCIAL SELF-SUFFICIENCY AND SELF-DETERMINATION

The EITC and CTC are vital tools for employers, employees and communities to promote financial independence. Businesses have a vested interest in helping people access the EITC. The business community and local government assume leadership roles that support the employee base, thereby helping workers achieve self-sufficiency. Randy Fiser, Vice President for Programs, Corporate Voices for Working Families, Washington, D.C. addresses ways in which employers support their workforce utilizing programs that "enhance the value of work" such as the EITC and child care assistance, Health insurance and paid vacation, Generous compensation, Learning opportunities and workplace flexibility, Hardship loans and grants, and Flexible spending accounts.

Public support programs such as transportation assistance and low income home energy assistance also help low wage workers position themselves to use their money in areas that are most beneficial to their families. 25% of working families in America can be classified as low-income, which is defined as having annual earnings less than 200% of the federal poverty threshold. 13% of families in the U.S. officially live in poverty, 71% of low-income families work and 24 million jobs pay less than a poverty-level wage for a family of 4.

How do you really engage businesses in this process? Partnerships must be developed between business organizations and local governments that are leaders in promoting asset development opportunities for low wage earners.

A. Business Leaders, Civic Champions Supporting Local Initiatives On Asset Building:

The IRS works tirelessly to promote partnership opportunities for area business in Idaho. Businesses continue to meet the challenge of supporting their employees. Carol Barnett, Director of Product and Partnership Development at the IRS is working to put the pieces of the puzzle together. The five businesses listed below employ innovative methods to get the word out about services that are available.

1. **US Bank** – Serves Ada and Canyon Counties. They give money and in-kind matches for coalitions.
2. **City of Idaho Falls** – Put stuffers in utility bills. The mayor championed this cause.
3. **Idaho Credit Union League** – Promotes e-filing and the opening of new VITA sites. Gives monetary and in-kind donations.
4. **Wells Fargo Bank** – They also give monetary and in-kind donations and encourage other financial institutions to participate.
5. **City of Boise** – Provided space for VITA sites. 20% increase in e-filings this past year because of site consistency. Boise has also been

working on anti-poverty initiatives, with a goal of ending homelessness in 10 years.

V. MUNICIPAL AND RURAL COMMUNITY OUTREACH PLANNING SESSIONS

Both Urban and Rural communities face unique challenges in developing EITC outreach and Volunteer Income Tax Assistance (VITA) services. During this session, Urban partners and Rural community partners separately identify strategies, challenges and opportunities to promote EITC/CTC and asset building outreach in their respective communities**.** Results from this session are discussed in the Action Planning and Building the Local Campaign session in Section XI.

VI. ENGAGING IN TARGETED OUTREACH TO REACH LOW INCOME FAMILIES

Partners for Prosperity in Blackfoot, ID works to achieve poverty reduction within a sixteen county region of Idaho. They are interested in promoting the EITC as a tool to help reduce poverty using five activities that may potentially impact poverty reduction through increased usage of the EITC:

1. Increase EITC usage through an Awareness campaign
2. Promote free-of-charge AARP Tax Assistance centers
3. Reduce dependence on Rapid Advance loans
4. Foster Direct Deposit capability by enabling new bank accounts
5. Promote tax credit leveraging through Financial Literacy programs.

In addition, the Brooking Institute in Washington D.C. is a resource helpful to low income wage earners. The Brooking Institute maintains a database with both census information and historic EITC participation records by state and zip code. This resource enables local programs to identify communities and neighborhoods in which to conduct targeted outreach campaigns and more efficiently reach income eligible families for the EITC. Further information on the Brooking Institute can be obtained by visiting the following websites: http://webappsbrookings.edu, http://www.brookings.edu/metro/eitc/dataguide.htm, or, to receive information or data from the IRS, visit: http://www.cbpp.org/eitc-partnership/territory-manager.htm, or http://www.irs.gov/tastatts/index.html.

Why don't people use the EITC?

The most common reason people do not use the EITC is because they do not know about it. Those most likely to not be aware of the EITC are Native Americans, Rural residents, Immigrants, Latinos, Very low-income, TANF recipients, High School drop-outs and married couples. Although some members in the groups mentioned above are aware of the EITC, they may be unable to claim EITC benefits. The reasons vary from not having a legal filing requirement, no qualifying children, to not having a state income tax.

VII. THE ROAD TO ASSET BUILDING AND FIANACIAL SELF-SUFFICIENCY: PROGRAMS AND RESOURCES

Individual Development Accounts (IDA's) are strong asset development tools. IDA's can significantly help low wage earners save towards the purchase of a home, business, or meet educational expenses. Melissa Krucker, Community Impact Coordinator for the United Way Treasure Valley discussed United Way's role in developing financial stability partnerships.

Idaho's IDA program is statewide. IDA accounts are matched at a rate of 2 to 1. The maximum IDA savings matched per account is $2,000, the maximum match dollars per account is $4,000. Savings plans are determined with each case manager with a minimum monthly deposit of $10. IDA accounts have an education component attached to them. A minimum of 10 hours is required for financial education while Asset Specific Training includes homebuyer's education, small business planning and career counseling. There are investor guidelines affiliated with IDA accounts. Investors must be at least 18 years old, live in Idaho, have a stable source of Earned Income, a household income at or below 200% of the Federal Poverty Guidelines, and a household net worth of less than $10,000.

The IDA program at the United Way of Treasure Valley recently won the AFI grant. It is the first federally funded IDA program for Idaho. The program received matched funds until 2010.

VIII. EMPOWERMENT THROUGH FINANCIAL LITERACY

In an effort to encourage financial institutions to identify untapped markets and to assist consumers in shaping their financial future, the Federal Deposit Insurance Corporation (FDIC) elected to educate the average consumer on the options available to help them retain some of their earnings through savings, home ownership and using credit wisely.

The FDIC and other agencies, organizations, and non-profits have joined forces to present Money Smart principles to agencies such as banks, community based organizations, credit unions, faith based organizations, colleges and universities and government agencies. These agencies make up the Money Smart Alliance which is a diverse group of members tasked with promoting, delivering and enhancing the implementation of financial education using Money Smart.

The Money Smart program is a comprehensive guide for instructors to provide financial literacy information. Money Smart is made up of ten instructor-led training modules covering basic financial topics such as banking, borrowing money, checking accounts, paying yourself first, keeping your money safe, managing your credit, seeking loans and owning your own home. The FDIC has also created programs on predatory lending

Beverly Healy, Chairman and Extension Educator at the University of Idaho-Extension, discussed programs that are specific to the Idaho population. The University Extension offers programs in nutritional health, food safety, financial security and management and interpersonal relationships. The university has two programs that community action programs can purchase for educational purposed, "Married and Loving It" and "Secure Your Future." They also have a Long Term Care workshop for long term care insurance, local resources to help you stay at home, help with medical costs and estate and Medicaid recovery. There is also a youth financial literacy curriculum offered in schools.

IX. TAX WISE AND EITC

Kim Manual, Director, National Relationships, Universal Tax Systems, Inc. (Tax Wise) presided over this section which included an overview of the Tax Wise Software and provided insights on efficient and effective use of the program.

Tax Wise is a resource for developing information date resources and tracking the statewide impact of EITC in community outreach initiatives. The Tax Wise software database can also serve as a program management tool for agencies serving Volunteer Income Tax Assistance clients. Information from Tax Wise can assist organizations in gathering statistical data for the development of reports, which may help demonstrate the affirmative impact free income tax services provided to the community.

X. SCALE AND SUSTAINABILITY

Growing a community outreach coalition is challenging. This session shared strategies for determining the most opportune time to expand programs and services. Additionally, information was presented on methods to develop program sustainability through partnerships as well as key resources for effectively

demonstrating the financial and human impact of the services offered through community agencies.

In order to achieve sustainability, several factors require implementation tools. Partner identification, building on similar organizational agendas utilizing personal relationships , embed operations within partner organizations rather than running the campaign out of one organization, integrate a vision from the beginning, expand pubic benefits and asset development strategies.

How does an organization define the scale of their operations? The first question then becomes: What is the goal? After the goal has been identified, a period of learning and innovation follows. Standardization, Building infrastructure, and Wide scale roll out begin the process. Going to Scale requires the following: Back room resources, good data, strong, skilled staff, In-kind and tangible funding resources, Technology and a plan. Internal controls must be installed and funding sources must be in place. Finally, tell your story to the community at large.

XI. ACTION PLANNING AND BUILDING THE LOCAL CAMPAIGN

During the numerous sessions of the Roundtable, participants were given time to break out into working groups based on service region and work in small teams on their local action plans. This section of the report presents the synthesized products of all of the local planning teams. Report-outs were not all standardized, but general topics addressed include lists of potential partners, lists of action steps, and lists of challenges.

1. CHALLENGES:

- How to get connected
- Volunteer Recruitment (Coordinator, Capacity)
- Communication between partners
- Identifying the players
- General lack of knowledge of EITC
- Geography
- Managing expectations of partners and vice versa
- Establishing and maintaining line of effective communication
- Engagement and trust of the clients
- Inefficiencies – low return on investments
- Technology Access
- Conservatism (Political, Religion, Institution)
- Education
- Demographics
- 55% of wealth in two counties – 45% of population

- Government to Government relationships (tribes)
- Funding and Grants
- State University system turfism

2. ACTION PLANS:

- Determine how to "get connected"
- Look for commonalities for doing outreach
- Facilitate face to face meetings
- Utilize conference calls and other web activities for communication
- Secure funding
- Incorporate diverse populations in the action planning and final products
- Establish outreach strategies for each city/area
- Partnership opportunities
- Technology donations from Corporations
- Education of low income populations
- In-kind contributions
- Develop and nurture TRUST
- National EITC day: February 1.

3. POTENTIAL PARTNERS:

- State of Idaho
- St. Alphonsus
- Albertson's
- Micron
- Washington Group International
- Citigroup
- Tele Performance
- Simplot
- City of Boise
- Direct TV
- Hewlett Packard
- HR Association
- Tribal Government
- AMG Sugar
- Independent Agriculture Employers
- College of Southern Idaho
- SPIERS
- Solo
- Jay Company
- G Lambia

- Heliz
- Poly-Con AGRA
- Dell Computers
- Monsanto
- INEL (Idaho National Environmental Library
- Non Pareil,
- Lamb West
- Fall River Electric
- ID Women's Correctional Facility
- Hess Pumis
- Blackfoot South

4. IDENTIFIED COMMUNITY LEADERS:

- Governor Butch
- Mayor Bieter
- Simplot Family
- Dempthorne
- Bishop Driscoll
- Reverend Bill Roscoe
- Carolyn Holly
- Mark Johnson
- Community Grandmother
- Chamber of Commerce
- County Commissioners
- Randy Woods
- D.L. Evans
- Jane Pavek of Wells Fargo
- Vickie Hahn of Magiz Valley Bank
- Ken Ribinette, Executive Director of CAPS
- John Key – CEO of Community Hospital
- Otto Higbee
- Mayor Mackay
- Mayor Rexburg
- Shawn Larson
- Souis Christensen
- Bill Fouch – Channel 6
- Karen Cornwall, IDF
- Pocatello Chamber of Commerce
- Robert Chambers, City of Pocatello – Director of Planning and Zoning
- Phil Meador – Auto Dealer
- Park Price, IDF, Auto Dealership
- Paul Menzor, Idaho Falls Register
- Terri Butizor, Idaho Fall Director

- Susie Racehorse – Tribes Community Access
- Tracey Sessions – Health and Welfare – Region 7
- Louise Dixie – Casino Manager/Gaming
- Kathy Ray – Economic Development
- Dale Lish, USDA Rural Development
- Gary Van Hyuffle – Salmon, City Manager
- Carla Mulkey – Salmon
- Mary Vagner – District 25 Superintendent
- Gyni Gilliam – Bannock Development Corporation
- Tim Solomon, RDA
- Mayor – St. Anthony

5. TIME FRAME FOR ACTION PLAN DEVELOPMENT:

May – June:	Evaluate materials received during the event. Identify how navigators fit in EITC.
August:	Make Contacts; Tailor responses to evaluated materials
Sept. – Nov:	Design Program
Jan. 08:	Implement
12 Month Plan:	Market and Educate population on EITC benefits.
Next Tax Season:	EITC benefits and information in place.

XII. CLOSING REMARKS AND EVALUATION

This report summarizes and provides an evaluation report for Children and Families (ACF) Office of Family Assistance (OFA) Welfare Peer Technical Assistance Network event entitled: EITC – Strengthening Economic Self-Sufficiency for Idaho Families.

The Welfare Peer Technical Assistance Network plans to follow up with Idaho at the one year mark to gauge progress and offer additional assistance if required.

Please see Appendix A for a copy of the agenda for this program.
Please see Appendix B for a copy of the participant list for this program
Please see Appendix C for a copy of the evaluation summary for this program.
Click here to make a comment regarding this report or to request further information.
Click here to submit a TA Request based upon what you have read in the Final Report.

APPENDIX A: AGENDA

APPENDIX B: PARTICIPANT LIST

APPENDIX C: EVALUATION SUMMARY

Appendix A: Agenda

WELFARE PEER TECHNICAL ASSISTANCE NETWORK

Strengthening Economic Self-Sufficiency for Idaho Families

Boise, Idaho
May 9-10, 2007

Agenda

DAY I	May 9, 2007
7:30 AM– 8:30 AM	**Registration**
8:30 AM– 9:00 AM	**Welcome, Introductions and Vision Statement** *Honorable Councilmember, Elfreda Higgins, Garden City* *Greg Kunz, Deputy Administrator, Division of Welfare Administration, Idaho Department of Health and welfare* *Carol Barnett, Director Product and Partnership Development, Internal Revenue Service* *Mary Chant, Executive Director, Community Action Partnership Association* *Moderator: James D. Butler, Program Specialist, Office of Family Assistance, Health & Human Services*
9:00 AM– 9:45 AM	**Achieving Financial Self –Sufficiency For Low Wage Earners and TANF Clients** *Moderator: James D. Butler, Program Specialist, Office of Family Assistance, Health & Human Services* **A Shared Commitment on EITC Outreach** *Greg Kunz, Deputy Administrator, Division of Welfare Administration, Idaho Department of Health and Welfare* Collaboration on EITC outreach, Idaho making a difference through the 2-1-1 CareLine and networked support services that help enable families to move toward financial independence and self-sufficiency. *David Cunningham, Consultant, EITC and Self Sufficiency Initiatives for the Office of Family Assistance (OFA), Health and Human Services (HHS) (contractor)* Strategies for creating dynamic outreach opportunities to promote the Earned Income Tax Credit (EITC) and Child Tax Credits (CTC) programs. Employers, business leaders, government and community organizations working together to assure that former TANF clients and low-wage earners participate in work support programs. Through such creative collaboration and partnership, opportunities on EITC /CTC outreach individuals and families uniquely contribute to the growth of the local economy.
9:45 AM – 10:30 AM	**An overview of the EITC Program and SPEC Resources to Support Local Community Initiatives.** *Barbara Sowder, Territory Manager, IRS SPEC, Portland Territory* This presentation will highlight VITA program updates, special projects, federal policy, regulatory changes and initiatives to expand the availability of community outreach programs in Idaho. **The Dynamics of Expanding EITC Outreach Partnerships In Rural Communities.** *Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS* Successful strategies for organizing VITA and EITC outreach in rural communities.
10:30 AM – 10:45 AM	**Break**

10:45 AM – 11:30 AM	**Key Initiatives: Working Coalitions and Partnerships in Idaho** Moderator: *Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory* This session will highlight successful initiatives to provide EITC /CTC outreach and Volunteer Income Tax Assistance (VITA) services for former TANF clients and low wage earners in Idaho. *Each of the programs will show case their innovative or best practices for EITC / CTC outreach and asset building initiatives.*
11:30 AM– 12:30 PM	**Strategies For Developing Community Coalitions And Partnerships.** Moderator: *Mary Chant, Executive Director, Community Action Partnership Association* Panel presentation: **Strategies For Developing Local Coalitions and Partnerships:** *Delverne Seaman, Earned Income Tax Credit Coordinator, Partners For Prosperity, Blackfoot, ID* *Rob Christensen, Boise City, ADA County Housing Authority; Coalition For Economic Improvement,, Treasure Valley, ID* *Marcia Munden, Volunteer Coordinator / Youth Coordinator, Catholic Charities, Boise, ID*
12:30 PM– 1:30 PM (Working Session)	**Working In Partnership To Build Strong Families, Enhance Financial Self-Sufficiency And Self-Determination For Idaho Families.** **The EITC / CTC as Vital Tools for Employers, Employees and Communities to Promote Financial Independence; Recognizing the Leadership Role of the Business Community and Local Government in Helping Workers Achieve Self-Sufficiency** *Randy Fiser, Vice President, Corporate Voices for Working Families, Washington, D.C.* **Recognition of Business Leaders, Civic Champions Supporting Local Initiatives On Asset Building:** *Moderator: Carol Barnett, Director Product and Partnership Development, Internal Revenue Service* *1) Wells Fargo Bank 2) U.S. Bank 3) Mayor's Office & City of Boise, Idaho,* *4) City of Idaho Falls 5) Idaho Credit Union League* Business leaders and local government recognize the importance of supporting the EITC and other asset building resources. Employers, financial leaders and municipal networks are important partners in promoting the development of community based, regional and statewide outreach activities on the EITC, CTC and Individual Development Accounts (IDA). This session will highlight business organizations and local governments that are leaders in promoting asset development opportunities for low wage earners.
1:30 PM– 2:30 PM	**Municipal and Rural Community Outreach Planning Sessions.** *Moderator: David Cunningham, EITC and Self Sufficiency Initiatives Consultant for the Office of Family Assistance (OFA), Health and Human Services (HHS)** (*Contractor) *Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS* *Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS;* *Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS ;*

	Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory Both Urban and Rural communities face unique challenges in developing EITC outreach and Volunteer Income Tax Assistance (VITA) services. During this session, Urban partners and Rural community partners will meet (separately) to identify strategies, challenges and opportunities to promote EITC / CTC and asset building outreach in their respective communities**.**
2:30 PM– 2:45 PM	**Break**
2:45 PM – 3:30 PM	**Engaging In Targeted Outreach to Reach Low Income Families.** *Moderator: Delverne Seaman, Earned Income Tax Credit Coordinator, Partners For Prosperity, Blackfoot, ID* *Paul Zelus, Program Planning & Development, Partners for Prosperity, Blackfoot, ID* The Brooking Institute in Washington D.C. maintains a database with both census information and historic EITC participation records by state and zip code. This resource can enable local programs to identify communities and neighborhoods in which to conduct targeted outreach campaigns and more efficiently reach income eligible families for the EITC. This session will include information on how to access and use the Brookings database resources to strengthen community outreach initiatives.
3:45 PM – 4:30 PM	**Regional Planning Sessions I: Building Local Partnership Networks.** *Moderator: David Cunningham, Consultant, EITC and Self Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor*) *Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS* *Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS;* *Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS ;* *Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory*
4:30 PM – 5:15 PM	**The Road To Asset Building and Financial Self-Sufficiency: Programs and Resources** Moderator: *Mary Chant, Executive Director, Community Action Partnership Association* **An Overview: Idaho, Individual Development Accounts (IDA);** *Melissa Krucker, Community Impact Coordinator, United Way Treasure Valley* Individual Development Accounts (IDA's) are strong asset development tools. IDA's can significantly help low wage earners save towards the purchase of a home, business, or meet educational expenses. This presentation will provide attendees with a general introduction to the IDA program in Idaho.
5:30 PM– 6:30 PM	**Reception**

DAY II	May 10, 2007
8:00 AM– 8:30 AM	**Implementing Effective Outreach Models and Demonstrating Community Impact.** *David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)* Review of key concepts and organizational strategies to facilitate development of an engaged Social Marketing Campaign to promote EITC/CTC outreach.
8:30 AM– 9:30 AM	**Empowerment Through Financial Literacy.** *Moderator: Jessica Sotelo, Executive Director, Partners for Prosperity* **Overview of the FDIC Money Smart program and financial literacy resources.** *David Cunningham, President Cunningham Group, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)* **Review of Financial Literacy programs and resources available in Idaho.** *Beverly Healy, Chairman & Extension Educator, University of Idaho- Extension* This session will introduce the FDIC Money Smart Program and share information on available financial literacy resources.
Workshop A: 9:30 AM– 10:30 AM (Concurrent Session)	**Tax Wise As A Resource for Developing Information, Data Resources and Tracking the Statewide Impact of EITC Community Outreach Initiatives.** *Moderator: Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory* *Kim Manuel, Director, National Relationships, Universal Tax Systems, Inc. (Tax Wise)* This session will include an overview of the Tax Wise Software and provide insights on efficient and effective use of the program. The Tax Wise software database can also serve as a program management tool for agencies serving Volunteer Income Tax Assistance clients. Information from Tax Wise can assist organizations in gathering statistical data for the development of reports, which may help demonstrate the affirmative impact free income tax services provide the community.
Workshop B: Session I 9:30 AM– 10:30 AM (Concurrent Session)	**Scale and Sustainability: Strategies For Determining When To Expand And *How To Sustain Your Local Initiative.*** *Moderator: Delverne Seaman, Earned Income Tax Credit Coordinator, Partners For Prosperity, Blackfoot, ID* *Jean Hunt, Executive Director, Campaign for Working Families, GPUAC Philadelphia, PA* Growing a community outreach coalition can be challenging. This session will share strategies for determining when to expand your program and services. Additionally, information on ways to develop program sustainability through partnerships. In addition, information on key resources for effectively demonstrating the financial and human impact of the services offered through your community agency.
10:30 AM – 10:40 AM	**Break**
10:40 AM– 11:30 AM	**Regional Planning Sessions II: Building Local Partnership Networks.** *Moderator: David Cunningham, Consultant, EITC and Self Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)* *Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education & Communication & Rural Strategy, IRS*

	Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS; *Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS ;* *Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory* This will be an interactive planning session to take your program strategy to the next level.
11:30 AM – 12:45 PM	**Regional Planning Group Reports**
12:45 PM – 1:00 PM	**Closing Remarks and Evaluation** *James D. Butler, Program Specialist, Office of Family Assistance, Health & Human Services*

Appendix B: Participant List

WELFARE PEER TECHNICAL ASSISTANCE NETWORK

Strengthening Economic Self-Sufficiency for Idaho Families

Boise, Idaho
May 9-10, 2007

Faculty

Carol A. Barnett
Director, Product and Partnership Development
Internal Revenue Service
401 West Peachtree Street
Atlanta, GA 30308
Tel: 404-338-8890
Fax: 404-338-9037
carol.a.barnett@irs.gov

Mary Chant
Executive Director
Community Action Partnership Association
5400 W. Franklin Road, Suite G
Boise, ID 83705

Randy Fiser
Vice President
Corporate Voices for Working Families
2600 Virginia Avenue, N.W., Suite 205
Washington, D.C. 20037
Tel: 202-333-8923
Fax: 202-333-8920
rfiser@cvworkingfamilies.org

Jean Hunt
Executive Director
Campaign for Working Families
1207 Chestnut Street
Philadelphia, PA 19107
Tel: 215-851-1819
Fax: 215-851-1731
jhunt@gpuac.org

Michael A. McBride
Chief, Educational Institution
Government and Tribal Partnerships
Internal Revenue Service
401 West Peachtree Street, Stop 52-WI
Atlanta, GA 30308
Tel: 404-338-7119
Fax: 404-338-8729
Mike.mcbride@irs.gov

James Butler
Family Assistance Program Specialist
HHS/Office of Family Assistance
370 L'Enfant Promenade, SW
Washington, D.C. 20447
Tel: 202-401-9284
Fax: 202-401-5554
Jdbutler@acf.hhs.gov

David H. Cunningham
President
Cunningham Group Consultants
12138 Central Avenue
Suite 262
Mitchellville, MD 20721
Tel: 703-867-6839
eitcconsultant@yahoo.com

Beverly Healy
Chairman & Extension Educator
University of Idaho-0Extension
5080 Glenwood Street
Boise, ID 31714
Tel: 208-377-2107
bhealy@uidaho.ed

Melissa Krucker
United Way of Treasure Valley
Coalition for Economic Improvement
1276 River Street, Suyite 100
Boise, ID 83702

Marcia Munden
Family Strengthening Worker,
Youth Program Manager
Volunteer Coordinator
Catholic Charities of Idaho
4202 W Emerald
Boise, ID 83702
Tel: 208-345-6031, ext. 109
Fax: 208-345-5674
mmunden@ccidaho.org

Jane Pavek
Wells Fargo Bank
877 West Main Street
Boise, ID 83702

Delverne Seaman
Community Development Specialist
Partners For Prosperity
625 West Pacific, Suite 1
Blackfoot, ID 83221
Tel: 208-251-5076
Fax: 208-785-5866
delvernes@p4peid.org

Robin Taylor
Senior Tax Analyst
IRS: Stakeholder Partnerships,
Education & Communication
401 W. Peachtree Street, STOP 52WI
Atlanta, GA 30308
Tel: 404-338-7174
Fax: 404-338-8363
Robin.Taylor@irs.gov

Paul Zelus
2334 Douglas Street
Potcatello, ID 83201
3540 East Yester Night
Meridian, ID 83642
Cell: 208-760-0742
pzelus@hahoo.com

Carol Quiller
Senior Tax Analyst
Internal Revenue Service
401 W. Peachtree Street, N.W.
Atlanta, GA 30308
Tel: 404-338-8091
Fax: 404-338-8363
carol.quiller@irs.gov

Barbara Sowder
Territory Manager, Area 4
W:CARE:SPEC: Portland/Seattle Territory
1220 SW 3rd Ave; M/S:O-180;
Portland, OR 97204
Tel: 503-326-2084
Fax: 503-326-7221
barbara.r.sowder@irs.gov

Donna Weddle
Sr. Tax Specialist, Portland Territory, Boise, Idaho
Internal Revenue Service
550 W Fort Street, MSC 041
Boise, ID 83724-0041
Tel: 208-387-2829, ext. 339
Fax: 208-344-1351
Donna.Weddle@irs.gov

WELFARE PEER TECHNICAL ASSISTANCE NETWORK

Strengthening Economic Self-Sufficiency for Idaho Families

Boise, Idaho
May 9-10, 2007

Participants List

Sheryl Bailey
Community Services Director
Eastern Idaho Community Action Partnership
357 Constitution Way
P.O. Box 51098
Idaho Fall, ID 83405
Tel: 208-522-5391
Fax: 208-542-1453
sbailey@eicap.org

Kim Boyack
Senior Tax Specialist
Internal Revenue Service
550 West Fort Street
Boise, ID 83724-0041
208-387-2829, ext. 258
208-334-1351
kim.boyack@irs.gov

Scott Burlingame
Program Specialist, Service Integration
Idaho Department of Health and Welfare
450 West state Street, 3rd Floor
Boise, ID 83720
Tel: 208-332-7385
Fax: 208-332-7291
burlings@dhw.idaho.gov

Kathy Gardner
(Idaho Foodbank) Agency Relations
The Idaho Foodbank
P.O. Box 5601
Boise, ID 83705
Tel: 208-447-8218
Fax: 208-336-9692
kgardner@cableone.net

Gaye Bennett
Public/Community Affairs Director
United Way of Treasure Valley
1276 River Street
Boise, ID 83702
Tel: 208-336-1070
Fax: 208-345-3242
gbennett@unitedwaytv.org

Tiffanie Braun
Community Services Coordinator
Community Action Partnership
428 W. 3rd Street
Suite 4
Moscow, ID 83843
Tel: 208-882-3535
Fax: 208-883-3888
t.braun@acommunityactionpartnership.org

Julia Campbell
Community Services Director
SouthEastern Idaho Community Action Agency
641 North8th
Pocatello, ID 83201
Tel: 208-233-7648, ext. 123
Fax: 208-234-4697
jcambell@seicaa.org

Rosio Gonzalez
Executive Director
Catholic Charities of Idaho
4202 W. Emerald Street
Boise, ID 83706
208-345-6031
rgonzalez@ccidaho.org

Yasmine Gonzalez-Rubio
Resource and Service Navigator
Idaho Department of Health and Welfare
1720 Westgate Drive, Suite B
Boise, ID 83704
Tel: 208-334-0862
Fax: 208-334-0770
gonzaley@dhw.idaho.gov

Cammie Heffern
Private Client Services
Wells Fargo Bank
877 West Main Street
11th Floor
Boise, ID 83702
208-393-2236

Celeste Keller
Idaho Region Contributions Manager
Wells Fargo Bank
877 West Main Street
11th Floor
Boise, ID 83702
Tel: 208-393-2079

Dalynn Kuster
Multi-Programs Manager
El Ada Community Action Partnership
355 North Orchard Street
Suite 107
Boise, ID 83706
Tel: 208-345-2820
Fax: 208-368-7290
dkuster@cableone.net

Curtis Loveless
Resource and Service Navigator
Idaho Department of Health and Welfare
823 Harrison Street
Twin Falls, ID 83301
Tel: 208-732-1596
Fax: 208-736-2113
lovelesc@dhw.idaho.gov

Victoria Hahn
CRA Officer
Panhandle State Bank
200 W. Neider
P.O. Box 2559
Coeur d'Alene, ID 83816
Tel: 208-666-6166
Fax: 208-665-3978
vickih@panhandlebank.com

Gayle Jost
Children and Families Program Specialist
ACF Seattle Regional Office
2201 Sixth Avenue, MS-74
Seattle, WA 98121
206-615-2570
Fax: 206-615-2574
gayle.jost@acf.hhs.gov

Stacey Nelson-Kumar
VP of Community Impact
United Way of Treasure Valley
1276 River Street
Boise, ID 83702
Tel: 208-336-1070
Fax: 208-345-3242
snelson-kumar@unitedwaytv.org

Deb Lattin
Resource & Services Navigator, Region V
Department of Health and Welfare
823 Harrison Street
Twin Falls, ID 83301
Tel: 208-732-1595
Fax: 208-736-2113
lattind@dhw.idaho.gov

Stephanie Marquardt
211 Lead Worker
211 Idaho CareLine
1720 Westgate Drive, Suite A
Boise, ID 83704
Tel: 208-287-1021
Fax: 208-334-5531
marquars@dhw.idaho.gov

Jennifer E. Martin
Resource and Service Navigator
Idaho Department of Health and Welfare
1720 Westgate Drive, Suite B
Boise, ID 83704
Tel: 208-
Fax: 208-
martinj1@idaho.gov

Kyle R. Prior
Shoshone-Paiute Tribal Chairman
Shoshone-Paiute Tribes
P.O. Box 2129
Owyhee, NV 89832
Tel: 208-759-3100, ext. 23
Fax: 208-759-3103
Prior.kyle@duckvalley.org

Pete Putra
Tribal Relations Program Manager
Family & Community Services,
Idaho Department of Health and Welfare
450 West State Street
CO 5th Floor
Boise, ID 83720-0036
Tel: 208-334-4941
Fax: 208-332-7330
putrap@dhw.idaho.gov

Landis Rossi
Director of Workforce Development Working Solutions
Easter Seals – Goodwill Northern Rocky Mountain
1613 N Park Centre Way
Nampa, ID 83651
Tel: 208-466-2671
Fax: 208-455-2537
landisr@esgw.org

Anne Smiley
Tax Specialist
Internal Revenue Service
915 Second Avenue, MSW180
Seattle, WA 98174
Tel: 206-220-5904
Fax: 206-220-5551
anne.k.smiley@irs.gov

ThuyChi McGraw
Tax Specialist
IRS-W&I-SPEC
1220 SW 3rd Avenue
Portland, OR 97204
Tel: 503-326-3091
Fax: 503-326-7221
thuychi.t.mcgraw@irs.gov

Tom Putnam
Community Development Manager
Partners for Prosperity
625 West Pacific, Suite 1
Blackfoot, ID 83221
Tel: 208-785-0059
Fax: 208-785-5866
tomp@p4peid.org

Adam Richardson
Farmers & Merchants, A Bank of the Cascades Company
121 N. 9th Street
Boise, ID 83705
Tel: 208-319-2410
Fax: 208-319-2440
arichard@fmsb.com

Maricela Rojas
Coordinator Working Solutions
Easter Seals – Goodwill Northern Rocky Mountain
1613 N Park Centre Place
Nampa, ID 83651
Tel: 208-466-2671
Fax: 208-455-2537
maricelar@esgw.org

Michelle Schildhauer
Resource and Service Navigator
Idaho Department of Health and Welfare
823 Park Centre Way
Nampa, ID 83651
Tel: 208-442-9991
Fax: 208-465-8431
schildhm@dhw.idaho.gov

Leo R. Smith
Nez Perce Tribe TANF Director
Nez Perce Tribe
P.O. Box 365
Lapwai, ID 83540
Tel: 208-843-2464
Fax: 208-843-7137
leos@nezperce.org

Nancy Stolberg
FSS Coordinator
Idaho Housing and Finance Association
P.O. Box 7899
Boise, ID 83707
Tel: 208-331-4796
Fax: 208-331-4808
nancys@ihfa.org

Heather Wheeler
Regional Director
Idaho Department of Health and Welfare
1720 Westgate Drive, Suite D
Boise, ID 83704
Tel: 208-334-6747
Fax: 208-334-6738
wheelerh@dhw.idaho.gov

Marion Woods
Service Integration/Navigation Program Manager
Idaho Department of Health and Welfare
Family and Community Services
450 W. State Street, 5th Floor
Boise, ID 83720
Tel: 208-334-0683
woodsm@dhw.id.gov

Jessica Sotelo
Executive Director
Partners For Prosperity
625 West Pacific, Suite 1
Blackfoot, ID 83221
Tel: 208-785-0059
jessicas@peid.org

John Todd
Resources and Services Navigator
Department of Health and Welfare
515 N. 16th Street
Payette, ID 83661
Tel: 208-642-7065
Fax: 208-642-9746
toddj@idhw.idaho.gov

Victoria Wonacott
IRS Tax Specialist
Internal Revenue Service
550 W. Fort Street, MS6610
Boise, ID 83724-0041
Tel:208-387-2829, ext. 340
Fax: 208-334-1351
Victoria.wonacott@irs.gov

Appendix C: Evaluation Summary

WELFARE PEER TECHNICAL ASSISTANCE NETWORK

Strengthening Economic Self-Sufficiency for Idaho Families

Boise, Idaho
May 9-10, 2007

Evaluation Results

	Evaluation Statement	Overall Score: Scale 1 – (Strongly Disagree) to 5 – (Strongly Agree)
I.	Peer TA staff handled the logistics, arrangements, and scheduling of the event in a timely and competent manner.	**4.5**
II.	Peer TA staff prepared me for the meeting by providing clear communication regarding the meeting's agenda and purpose.	**4.1**
III.	The speakers had valuable information to share, and were thorough in the subject areas presented.	**4.4**
IV.	The speakers engaged the audience effectively and facilitated interactive discussions.	**4.3**
V.	The information presented and shared will be useful in launching EITC outreach initiatives and building local partnership networks.	**4.5**

I. What did you find most useful about attending this roundtable (i.e. any immediate or long-term benefits to you/your staff that you anticipate as a result of attending this roundtable)?

1. **Many resources identified.**
2. **The need there is to educate our families and how much money is not being claimed.**
3. **Becoming more informed about the benefit for numerous clients that EWITC can bring.**
4. **Some partners and potential partners discussed about the next year how to improve their services provided to the community. There was a great commitment and hopefully will come reality.**

II. About what issues would you like to have had more discussion at the roundtable?

1. **More time on action planning.**
2. **Developing strategies on how to present to big business and government that has been successful in other states.**
3. **Good breadth/variety.**
4. **The <u>HOW</u> plan (how to), (where to start) so that we can utilize the funds (35 million) that is untouched.**
5. **More time spend on developing action plans.**
6. **Rural outreach.**

III. On which aspects of the EITC/CTC would you like to receive additional technical assistance?

1. **Information/Software/Technologies.**
2. **Access to statistics.**
3. **Every aspect so that we have concrete stats to present to various individuals and agencies so we can get started.**
4. **Engaging local government officials.**

IV. Please share any overall comments regarding the program or the speakers, which you feel might be helpful in planning future programs.

1. **The roundtable was very useful in informing and educating us.**
2. **This training was exciting as we can be a big part of bringing money back into Idaho. Presenters were great.**
3. **I gained a better understanding of what EITC is: How to incorporate it into my daily work assignments.**
4. **Great program!! Thank you.**