U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES
Administration for Children and Families
Office of Family Assistance

Earned Income Tax Credit (EITC) Louisiana Initiative:

Helping Families Rebuild After Hurricane Katrina

Final Report

Written By:

Michele Tapp, AFYA, Inc. and David Cunningham, Cunningham Group

November 30, 2005 :: Baton Rouge, LA

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BACKGROUND STATEMENT

The Office of Family Assistance (OFA) in the Administration of Children and Families (ACF) of the U.S. Department of Health and Human Services (HHS) sponsored an Earned Income Tax Credit (EITC) planning roundtable in Baton Rouge, LA, on October 25–26, 2004. The goals of the roundtable were

- to build awareness and understanding of the EITC and Child Tax Credit (CTC) as tools to promote financial self-sufficiency for former Temporary Assistance to Needy Families (TANF) clients and low-income households;
- to expand the participation and uptake of former TANF clients and low-income families in the EITC and CTC programs through targeted outreach and education initiatives about EITC and CTC;
- to promote collaboration and partnerships between the Louisiana Department of Social Services (LDSS), the Internal Revenue Service (IRS), Community Action Agencies (CAAs), faith-based organizations, social services networks, public officials, and employers to facilitate, in turn, the development of outreach protocols and strategies for Louisiana on the EITC/CTC; and
- to develop media outreach resources and strategies to build community awareness and support of EITC outreach/CTC education campaigns.

As a result of the roundtable, the LDSS committed $260,000 in TANF maintenance of effort (MOE) funds to support the development of community-based EITC/CTC outreach and free tax preparation services for former TANF clients and low-income families. The funds were provided in mini-grants averaging $30,000 to community-based organizations, faith-based organizations, and CAAs. A statewide campaign was initiated targeting TANF clients and Head Start families for EITC/CTC education and outreach. The Louisiana governor's office included EITC outreach and participation as a major component in the State strategy to reduce incidents of poverty, especially among children:

- Eight organizations were awarded mini-grants in the approximate amount of **$30,000** to establish TANF client-targeted outreach initiatives.
- The IRS reports that these grantees completed **4,836** EITC returns for tax year 2004, generating EITC payments for **$8,710,174.**
- The sites generated **$2,992,127** in childcare tax credits.
- Of the **$8,710,174,** one grantee that provided outreach in New Orleans**,** Total Community Action, generated approximately half of the returns. Total EITC returns this grantee generated for New Orleans equaled **$4,490, 311.**
- The IRS reports that EITC uptake increased by 34% for tax year 2004.

In July 2005, LDSS held a planning meeting to build on the success and to prepare for the 2005 tax year. Less than two months later, on August 29, 2005, Hurricane Katrina hit the State. Many of the clients targeted for EITC/CTC outreach in the 2004 tax year are now relocated outside of Louisiana or are temporarily residing elsewhere in the State. In addition, many evacuees who did not previously qualify for EITC will likely qualify in 2005 due to hurricane-related job losses and reductions in annual income. The November 30 meeting was convened to update and amend program strategies in response to the disaster, to assess the capacity of community organizations to provide free tax assistance services, and to determine how to provide critical outreach to displaced families in the 2006 tax season.

EARNED INCOME TAX CREDIT (EITC) LOUISIANA INITIATIVE:
HELPING FAMILIES REBUILD AFTER HURRICANE KATRINA MEETING

BATON ROUGE, LA
NOVEMBER 30, 2005

MEETING OVERVIEW

The aftermath of Hurricane Katrina has made a profound impact on the residents of Louisiana. In response, HHS, ACF, OFA convened to assess the far-reaching devastation and to develop concrete strategies for recovery. On November 30, 2005, in collaboration with LDSS, OFA hosted in Baton Rouge, LA, the EITC Louisiana Initiative: Helping Families Rebuild After Hurricane Katrina meeting. Leaders from Federal and State government agencies and community social service networks engaged in meaningful dialogue to identify and harness available resources, creating next steps for immediate long-term and short-term recovery goals. What follows are salient highlights from this one-day meeting.

MEETING MINUTES SUMMARY

WELCOME AND OPENING REMARKS:

PRESENTER: LOIS BELL, DIRECTOR, DIVISION OF STATE & TERRITORY TANF MANAGEMENT, ACF, OFA, HHS

Lois Bell, Director of the Division of State & Territory TANF Management, ACF, OFA, HHS, shared that the EITC Louisiana Initiative: Helping Families Rebuild After Hurricane Katrina meeting was sponsored as a strategy session to discuss the most pressing issues with respect to the EITC. The principal focus was to discover ways to "restrategize the outreach effort." She thanked Leon McGowan, Regional Administrator of Region VI, ACF, and State agency representatives from Louisiana for their support.

PRESENTER: ADREN O. WILSON, ASSISTANT SECRETARY, LDSS

Adren O. Wilson, Assistant Secretary of the LDSS, touted the EITC as a "critical tool" that would be needed to achieve the overarching goal of restoring the State of Louisiana. He shared that the size of the depth of the devastation has challenged every level of leadership "to do a little better" to be part of the solution. On behalf of the Louisiana DSS, Mr. Wilson thanked partners within the Louisiana Department of Labor (LDOL) and the Louisiana Department of Revenue (LDOR). In addition, he recognized the support received from Federal partners, including OFA, HHS, IRS, and community partners.

PRESENTER: JAMES GILMORE, POLICY ADVISOR ON HOUSING AND COMMUNITY DEVELOPMENT (LHCD), OFFICE OF THE GOVERNOR

James Gilmore, Policy Advisor on LHCD in the Office of the Governor, expressed gratitude for all of the EITC outreach efforts that had been conducted before the meeting. He heralded the program as "the single most proven, tangible, visible initiative that lifts citizens out of poverty." Mr. Gilmore challenged everyone to work more aggressively and to identify innovative strategies to reach citizens who have been displaced by the hurricane and who qualify for the EITC. These efforts will be instrumental in ensuring that those citizens who feel helpless will be able to "place dollars in their pockets." Great consideration must be given to creative efforts that will promote economic growth through the receipt of these monies. Examples of such options may include home repair or down payments for home ownership, small business ventures, and education for evacuees and their children.

PRESENTER: GWEN SCOTT, ASSISTANT SECRETARY, OFFICE OF TAX ADMINISTRATION, LDOR

Gwen Scott, Assistant Secretary of the Office of Tax Administration in the LDOR, has the responsibility of providing a vast array of tax-related and support services. She acknowledged the mandate to reach sectors of the public that are most in need. The Office of Tax Administration, she reported, has begun to implement new outreach measures during the aftermath of the hurricanes. New planning strategies have taken effect and office personnel are now assigned to the Federal Emergency Management Agency (FEMA) Disaster Recovery Centers to assist those impacted by the hurricanes. Admitting that these efforts are challenging, Ms. Scott asserted that the office is "committed to helping Louisiana citizens." Partnerships are also being strengthened with the LDSS in an effort to provide services to the displaced.

PRESENTER: LEON MCCOWAN REGIONAL ADMINISTRATOR, REGION VI, ACF, HHS

Leon McCowan, Regional Administrator of Region VI, ACF, HHS, spoke of the privilege of being able to provide this level of technical assistance (TA) to all of those impacted by the hurricanes. Mr. McCowan gave particular recognition to the national office staff at OFA, ACF, HHS, for their leadership in making funding available for this workshop. Additionally, he recognized the LDSS, LDOL, and LDOR for their commitment and collaboration on this project. He explained that, in many instances, these individuals were the first responders; their efforts made a meaningful impact as other outreach efforts could not be galvanized as quickly. Mr. McCowan expressed full confidence that the key players at the meeting would be able to make some tremendous inroads regarding the EITC program, helping Louisiana residents recover from the hurricanes.

THE EITC AND CTC: HOW TO REACH ELIGIBLE CLIENTS IN THE STATE: WHAT STRATEGIES AND RESOURCES ARE NEEDED TO PROVIDE OUTREACH SERVICES AS A RESULT OF THE HURRICANES?

FACILITATOR: DAVID CUNNINGHAM, CONSULTANT, SELF-SUFFICIENCY INITIATIVES AND THE EITC, OFA (CONTRACTOR)

PRESENTER: GRANT COLLINS, DEPUTY DIRECTOR, OFA, ACF, HHS

Grant Collins, Deputy Director of the OFA, ACF, HHS, called the meeting a "useful and strategic opportunity to promote positive change within the State of Louisiana." He asserted that the occurrence of the hurricane and related events has changed the way that HHS views its role. "In a disaster," he shared, "there was a strong push to have a human services response, not just a health response. I see this [meeting] as a logical extension that should happen anytime a disaster of this magnitude occurs." Mr. Collins further discussed the masses of people who have been physically displaced in the aftermath of the hurricane; given this complexity, he spoke of the inherent challenge in the evacuees' ability to respond with respect to tax-related issues. He estimated that approximately 280,000 evacuees have relocated to other communities within Louisiana. An additional 400,000 evacuees have relocated to cities in the other 46 States and the District of Columbia. In turn, there is an inherent amount of complexity and ambiguity surrounding tax-related issues. The evacuees' ability to respond to deadlines, options, and extensions will be directly impacted. The Federal government, he asserted, stands ready to provide a wide array of resources to ensure a seamless transition to new housing, new jobs, and other needs.

Mr. Collins called for an intensive EITC campaign that addresses the high levels of transience and displacement. A degree of sensitivity is needed in implementing these campaigns, given the fact that many evacuees will have different addresses, may have misplaced pertinent identification and documents, and may not be able to access records of employment. He also spoke of the need to facilitate effectively the coordination of resources in the State—without duplication of effort.

An effective EITC campaign would be characterized as presenting evacuees with clear, tangible, tax return action steps that could be easily implemented. With respect to the tax filing procedure, Mr. Collins discussed the benefits of creating a designated area on the tax return form that would allow filers to simply **"check the box,"** indicating their desire to file for the EITC and to have the IRS determine their eligibility for the benefit. He also indicated that support of the EITC campaign could be strengthened by disseminating information well in advance of the tax season. It was also recommended that a letter be sent from the governor to all Louisiana evacuees informing them where they could obtain information about filing their income tax returns and that free income tax filing would be available through the Volunteer Income Tax Assistance (VITA) programs. The letter should also inform them about the qualifications for EITC. These efforts, he shared, stand to greatly improve the visibility of EITC on national and State levels. Meeting discussion was also generated around the idea of approaching new national partners, non-profit, financial consulting organizations to provide tax-related and financial services to those impacted by the hurricanes.

Meeting participants were also encouraged to forward their contact information to Jan Pretus, the territory manager for Louisiana and Mississippi Stakeholder, Partnerships, Education and Communication (SPEC), IRS. Ms. Pretus can include their names in a listserv through which they can receive important updates on the EITC and other tax-related information.

OVERVIEW OF IRS, VITA FOR THE 2005–2006 INCOME TAX FILING SEASON

PRESENTER: JAN PRETUS, TERRITORY MANAGER FOR LOUISIANA AND MISSISSIPPI SPEC, IRS

Ms. Pretus reported that the IRS is working closely with the Office of Family Support (OFS) under LDSS, LDOR, and community organizations on providing VITA services and EITC outreach. In 2004, over 529,000 residents in Louisiana filed EITC returns, which accounts for $1.1 billion in EITC funds. The IRS estimates that $93 million in EITC benefits remained unclaimed in that year. According to Ms. Pretus, this unclaimed money was available for Louisiana residents if they had filed for the EITC.

Through the collaborative, EITC outreach efforts in 2004, income tax filings through the VITA sites have increased by 34 percent statewide. She especially noted the EITC outreach successes of Total Community Action (TCA). In 2004, TCA (New Orleans & Orleans Parish) increased the uptake of income tax filings through their VITA sites by 60 percent. This is the single largest increase in EITC uptake for a VITA site in the country. She maintained that Louisiana is making solid strides, but that "we have a lot of work left to do."

Ms. Pretus also shared that last year marked the first year that IRS actively partnered with OFS, who was instrumental in rural area outreach and dissemination of the EITC message. While solid efforts are underway, the following lessons have been identified and must be implemented:

- Efforts to maximize outreach and education must start early.
- Key stakeholders should be encouraged to speak proactively with IRS tax specialists to apprise them of recent and/or relevant developments.
- Training and TA should be scheduled and received before serving evacuees.

The IRS is working diligently to assist hurricane evacuees. The hurricanes resulted in a tremendous number of business losses and in massive unemployment throughout Louisiana and the region. This loss of jobs and the resulting reductions in annual incomes mean that more households will financially qualify to participate in the EITC program for tax year 2005. Many of those qualifying for the EITC for the first time are not aware of the program. Thus outreach and education efforts for hurricane evacuees must consider this.

In response to the hurricanes, Congress adopted the Katrina Emergency Tax Relief Act of 2005 and the Gulf Opportunity Zone Act of 2005. These measures will make it easier for those impacted by the hurricanes to claim the EITC. Those providing VITA services to evacuees need to receive training on

the new tax provisions. Examples of the special provisions adopted to assist evacuees include the following points:

- Taxpayers who resided in designated Hurricane Katrina, Hurricane Rita, or Hurricane Wilma disaster areas will be allowed to use their 2004 earned income to compute their 2005 EITC. This provision applies if their earned income from 2004 was greater than their earned income in 2005. This is a likely situation if an individual had a sustained period of unemployment due to the hurricanes.
- The taxpayer will not lose any credits, deductions and/or experience a filing status change because of a temporary housing relocation due to the hurricanes. This would likely occur in situations where children are relocated because of the hurricane.
- Income tax form filing deadlines will be extended for those who currently live or previously resided in the hurricane disaster areas.
- Persons (households) who have taken into their homes individuals who have been impacted by the hurricanes and whose address is serving as the "principal place of residence" for the evacuees are eligible for a $500.00 tax credit.

Ms. Pretus informed meeting participants that Congress continues to discuss additional provisions under tax law through which assistance can be provided to hurricane victims. She advised that the IRS has established "a national tax group that is working on some of the nuances of tax legislation. [This] is a work in progress. The tax relief act will directly impact many of the tax paying population in Louisiana." To insure that their requests for information, replacement documents, and tax forms are expeditiously processed, those persons who are affected by the hurricanes are being advised to write in "red" on the outside of the envelope containing their request the words "Hurricane Katrina" (or the appropriate storm name).

The IRS is undertaking the following additional activities: We are negotiating with five national organizations, she reported, that may partner with the IRS and provide pro bono tax services for complicated evacuee income tax cases. Regarding next steps, an "EITC Grass Roots" event will be hosted on February 11, 2006, in New Orleans. TCA and the LDSS, OFS were named as the host partners for this event. This event is being organized by the IRS EITC Project Office and will function as a special tax-filing day.

In addition, the IRS has established a national toll-free, telephone number for evacuee assistance. That number is (866) 562-5227. The telephone number is staffed 24 hours a day.

Ms. Pretus reminded the meeting participants that, to serve as a VITA volunteer and prepare income tax returns, all volunteers must be certified by the IRS. This will be especially important this year due to changes in tax law and in filing procedures, resulting from the hurricanes. She directed participants to the IRS Web site (www.irs.gov) to access more detailed, relevant information regarding EITC and tax

preparation issues. Participants were reminded to be proactive in scheduling training sessions and in ordering related software.

SHARING SELECTED ORGANIZATIONAL STRATEGIES TO REACH OUT TO COMMUNITIES IMPACTED BY THE HURRICANES

PRESENTER: PETER DANGERFIELD, EXECUTIVE DIRECTOR, TCA, NEW ORLEANS, LA

Peter Dangerfield, the Executive Director of TCA, discussed the need to work with the media to create a holistic approach to dealing with poverty in Louisiana. "We continue to state that there is a need for an official policy on poverty reduction in the State." The response to this concept has not been particularly strong, but Mr. Dangerfield and TCA remain hopeful that this goal will be realized. Further recommendations have been made for the City of New Orleans to create an official policy [and strategy] on poverty reduction. "There is also a need," Mr. Dangerfield shared, "to identify as many leaders as we can to invite to attend meetings and learn about poverty reduction and the EITC. We also need to inform the public of additional resources that are readily accessible [such as the Child Tax Credit, financial literacy programs, etc]." He also supported reaching out to the faith-based institutions. Faith-based leaders in New Orleans have been a critical resource for helping to promote and educate their parishioners and the public about the EITC. Mr. Dangerfield highlighted an EITC message campaign for which he was responsible and that included disseminating DVDs and cassettes (for community workshops and meetings) and public service announcements (PSAs).

PRESENTER: LOLA MAY, EXECUTIVE DIRECTOR, QUEENSBOROUGH NEIGHBORHOOD ASSOCIATION, INC. (ONA), SHREVEPORT, LA

Lola May, the Executive Director of ONA, discussed efforts underway to "get the word out about the EITC and CTC within distressed regions. Outreach efforts this year have included FEMA temporary housing sites. She reported that last year her organization was able to process income tax returns by e-filing (over the Internet). ONA also partnered with Grambling State University (GSU) to conduct outreach to rural communities. "This year will be greater. We have been blessed in our efforts and have been able to identify evacuees" and provide information [on foreclosures, reverse mortgages, etc.] and tax preparation services." Ms. May noted that the office hours [this year] have been extended. "In some instances we will take the services to those who need them." "In December 2005 and February/March 2006, we will have access to the 'Freddie Mac'-provided community outreach service delivery bus. We will utilize the bus to provide outreach services for hurricane evacuees that will include EITC/CTC education and tax preparation services." It was noted that ONA had received a grant from the LADSS last year for EITC outreach and tax preparation services. ONA has applied for a new grant to support the delivery of tax filing assistance and other services in 2006.

PRESENTER: MARGARET LOWERY, PROJECT DIRECTOR, GRAMBLING STATE UNIVERSITY (GSU), GRAMBLING, LA

Margaret Lowery, the Project Director at GSU, discussed how the EITC Outreach Project mobile laboratory is used to provide income tax filing assistance in seven rural parishes (counties). The project was funded through a grant from the LADSS last year. GSU students have nicknamed the mobile lab the "Shell." The Shell was given to GSU. Through grants, it has received several computers and a plasma screen for training purposes. Ms. Lowery further explained that the mobile unit is connected with a satellite system so that information can be downloaded from the Internet. She suggested that meeting participants work with faith-based organizations; the university has made inroads with local churches by interfacing with local pastors. Through networking with faith-based leaders in rural communities, several churches were made available and have served as local area VITA sites. The faith-based leaders were also instrumental in helping to publicize the availability of free income tax assistance services. She encouraged participants to contact respective organizations and to ask them to place information about EITC and the availability of VITA services in the community on their counters, in waiting rooms, and in employee lunchrooms. Organization newsletters also serve as good communication vehicles to disseminate information about EITC and tax services.

THE MEDIA AS COMMUNITY PARTNERS ON EITC/CTC OUTREACH INITIATIVES

FACILITATOR: LEON MCCOWAN REGIONAL ADMINISTRATOR, REGION VI, ACF, HHS

PRESENTER: ADELL BROWN, VICE CHANCELLOR FOR FINANCE AND ADMINISTRATION, SOUTHERN UNIVERSITY (SU) AGRICULTURE CENTER (AC)

Adell Brown, the Vice Chancellor for Finance and Administration at SU's AC, reminded participants that there is no "one way" to reach people. He charged them to "explore multiple venues" in an effort to increase and to maximize their outreach efforts to displaced individuals and families. As one who has worked extensively with the press and media outreach campaigns, Mr. Brown suggested that media is a wonderful vehicle for reaching the masses with relevant information regarding EITC. He acknowledged that a longstanding history of working with the press is not a prerequisite for effectively interfacing with the media. Strong relationships, rather, were targeted as the principal need for stakeholders to be successful with the press. "Oftentimes, we are intimidated by people we see in the press and we don't aggressively pursue relationships with them. Life is about developing partners in various venues, but not to the exclusion of the media. These bonds will help to move your programs forward in each endeavor."

In other remarks, Mr. Brown referenced instances when participants may have read a newspaper, only to see a story that they "should" themselves have told. In turn, he challenged participants to not discount or not refuse to integrate media planning into the sequence of planning. Mr. Brown also issued a caveat about engaging in a dispute with those who have the ability to put information in print. Participants were made aware that, although their story and a media angle may be relevant, several entities compete for the same press. **"Make sure your information is relevant to ensure coverage,"** he asserted. Participants were also encouraged to find a "hook" (i.e., story slant or angle) that is distinct.

PRESENTER: CHRIS ROGERS, DIRECTOR OF COMMUNICATIONS AND TECHNOLOGY, SOUTHERN UNIVERSITY (SU), AGRICULTURE CENTER (AG)

Chris Rogers, the Director of Technology Ssystems at the SU's AG, reminded meeting attendees that the press is not an enemy; rather "we are your friend." **"Remember they are not your enemies, but can be worked with to support your agency and organizational agendas.** Always have background information, accurate factual information, understanding that whatever is forwarded to the media will be published."

Mr. Rogers discussed his background as a freelance photographer, and cited the need to always be prepared for media opportunities. He also noted the strategies and tips that are needed to develop a media strategy. He reminded meeting attendees that a story is bound to be revealed and that, therefore, there is a need to always have the necessary tools at hand. "Everyone can be a reporter and photographer by always carrying with them the basic tools (e.g., paper, pen, and camera)," he shared. It was suggested that respondents seek ways to promote their respective organizations, observing that not many at the conference had a lapel pin or different ways to "brand" the image.

Mr. Rogers explained that there is a need to increase the impact of programs by forging alliances with the press and educating the public about stakeholder activities. Following are the different media formats that are available for exposure: print media (e.g., newspapers, magazines, community newspapers, church bulletins); electronic media (e.g., television, radio, Internet); recruitment aspects (e.g., advertisement placement); and PSAs.

He also suggested **presenting the press with story tips to aggressively, proactively promote upcoming events.** Inviting reporters to events for interviews and photographing sessions was also encouraged. "If you will use the media, there is a need to **create a media plan,"** Mr. Rogers said. Meeting participants were encouraged to become acquainted with local news organizations and create a list of local media and contact information. Particular emphasis should be placed on the contact's title. There is also a need to inquire about news article submission. In turn, because stakeholders are making the press' job simpler, they will be more apt to receive event or organization coverage.

Mr. Rogers also highlighted the benefit of planning early to ensure that coverage will be garnered:

- **Public relations goals should be identified throughout the process**; targeting audiences and crafting messages are also critical.
- All media is not free; budgetary allocations should be made to allow for media tools (e.g., paid advertisements, camera equipment).
- Time line identification allows enough time for the press to cover the event. This foresight creates an opportunity to involve the press in the planning process.

- Be clear about the reason for contacting the press and use reporters' time wisely, understanding that they are often under strict deadline constraints.
- Organizations may also want to create their own press releases, considering it is often the point of media entry.
- Organizations could use the Internet to locate examples of press releases to serve as models for their own media piece.
- Organizations should thank reporters after garnering coverage

MEETING PARTICIPANT FEEDBACK/DISCUSSIONS

During the EITC meeting, several participants spoke candidly about their efforts to effect change in the lives of the evacuees. What follows are their remarks:

- Some participants offered incentives to people who visited their office for EITC services. Given the number of evacuees within the community, plans have been put in motion to strategically target Head Start families. For program implementation, the desire is to utilize paid staff versus volunteers. Participants concurred that, in many instances, volunteers are reticent to make a solid commitment to the work. Because of this, organizations may not realize maximum program success.
- Participants discussed issues about providing culturally appropriate services. English is not the primary language of all displaced evacuees. Moreover, certain cultural and ethnic traditions may preclude them from readily receiving traditional forms of assistance. Accordingly, it was suggested that the EITC outreach services reflect these nuances. Meeting participants made specific commitments to locate these displaced individuals, to provide them with quality services, and to ensure a seamless transition as they seek to stabilize all facets of their lives. Given the magnitude of the hurricane disaster, meeting participants remained dedicated to traveling extensively to reach those in need.
- Based on the breadth of services and the complexity of the situations surrounding EITC outreach, participants affirmed the value that their respective staff should become cross-trained, which would allow grassroots organizations to provide comprehensive services to larger numbers of evacuees.
- Participants made commitments to use technology (e.g., mobile computer units) to reach evacuees, providing comprehensive services and preparing hurricane victims for the next step in their lives.

- Participants asserted that they should present more "outside the box" options as vehicles to meet evacuees' needs. They agreed to focus on financial empowerment, access to existing resources, outreach to faith-based communities, and technological solutions. Participants understood that to provide these tools would require them to offer extended office hours.

REGIONAL PLANNING AND COMMUNITY PLANNING SESSIONS:

FACILITATOR: DAVID CUNNINGHAM, CONSULTANT, SELF-SUFFICIENCY INITIATIVES AND THE EITC, OFA (CONTRACTOR)

Along with Federal and State agency partners, community organizations worked to develop community outreach strategies for the 2006 tax-filing season. Strategies to help families displaced by the hurricanes encompassed targeted outreach, including establishing mobile tax assistance sites to serve FEMA temporary housing communities.

Organizations also undertook initiatives to enhance outreach and education about EITC/CTC through faith-based organizations, Head Start, School Districts, and employers. Additionally, participating organizations and the LDSS undertook major initiatives to develop local media (newspapers, radio, and television) as community outreach partners on the EITC/CTC. Moreover, they took the following steps:

- LDSS regional offices and community agencies agreed to expand their services this year to include mobile outreach efforts to two rural communities in each of their service areas.
- Freddie Mac will support the community agencies in their rural outreach. Freddie Mac will make available two mobile bus units for community outreach support. The agencies will use these vehicles for EITC outreach and free tax assistance services during the tax season.
- The Cooperative Extension Services of Louisiana State University and Southern University have agreed to participate in the EITC outreach and education efforts this year. The Cooperative Extension Services have offices in every parish in the State.

CONCLUDING REMARKS

PRESENTER: ADREN O. WILSON, ASSISTANT SECRETARY, LDSS

In conclusion, Mr. Wilson acknowledged the level of diversity represented during the meeting among the key stakeholders. He was pleased that the discrete, regional and local planning teams had created "clear benchmarks" that would serve as barometers to assess progress collectively and individually. Mr. Wilson reminded the respective offices of the several action items for which he and they took responsibility. Specific commitments were as follows:

- LDSS will fund grants for community agencies to support their EITC outreach initiatives. Community Agencies that have submitted EITC outreach funding proposals will be sent correspondence approving their grant awards.
- A toll-free telephone number will be established for the Louisiana EITC Outreach and Income Tax Filing Assistance Program. Operators at the toll-free number will provide information on eligibility for the EITC, share information on the location of VITA locations, and help callers with questions about missing income tax records and W-2s.
- LDSS will request from FEMA information on the location of temporary housing for Hurricane Katrina and Hurricane Rita evacuees. This information will be shared with CAAs and LDSS regional offices to help them develop local initiatives for EITC outreach and income tax filing assistance.
- The community agencies participating in the EITC outreach efforts will be added to the listserv of 400 agencies and organizations already assisting hurricane evacuees. The listserv is keeps key organizations and community leaders informed and updated on initiatives and efforts to assist hurricane evacuees.
- The Faith-Based Leaders Information Data-Base will be updated with information on EITC eligibility and (when available) information on the VITA sites operating throughout the State. This will enable faith-based leaders to share information and to participate in the EITC and the free income tax filing assistance outreach efforts.

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Agenda

November 30, 2005

November 30, 2005 :: Baton Rouge, LA

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AGENDA

November 30, 2005

8:00 AM – 9:00 AM	**Registration**
8:30 AM – 9:10 AM	**Welcome and Introductions** **Adren O. Wilson**, *Assistant Secretary, Louisiana Department of Social Services (DSS)* **James Gilmore,** *Policy Advisor on Housing and Community Development, Office of the Governor* **Gwen Scott,** *Assistant Secretary, Office of Tax Administration, Louisiana Department of Revenue* **Leon McCowan**, *Regional Administrator, Region VI, Administration for Children & Families (ACF), U.S. Department of Health and Human Services (HHS)* **Lois Bell**, *Director, Division of State & Territory TANF Management, ACF, Office of Family Assistance (OFA), HHS*
9:10 AM – 10:00 AM	**The EITC and Child Tax Credits (CTC): Programs To Help Families Build Financial Self-sufficiency. Dialogue with Louisiana State Officials and Service Providers: How To Reach EITC-eligible Clients in the State, and What Strategies and Resources Are Needed To Provide Outreach Services as a Result of the Hurricanes?** ***Presenter:* Grant Collins,** *Deputy Director, OFA, ACF, HHS* ***Facilitator:* David Cunningham**, *Consultant, Self-Sufficiency Initiatives and the EITC, OFA (contractor)* This session will provide an opportunity to discuss strategies for EITC/CTC outreach in the wake of hurricane displacement and explore the organizational outreach capabilities of community agencies to provide services on the EITC/CTC and free income tax services. In addition, this session will provide an opportunity to identify the resources needed to provide quality services to diverse communities in urban and rural settings.

10:00 AM – 10:30 AM	**Overview of Internal Revenue Service (IRS) Volunteer Income Tax Assistance (VITA) for the 2005–06 Income Tax Filing Season** **Jan Pretus**, *Territory Manager for Louisiana and Mississippi; Stakeholder, Partnerships, Education and Communication (SPEC); IRS* The IRS collaborated with the State of Louisiana on the EITC/CTC Community Outreach Initiative in 2004–05 through the SPEC organization, which provides critical support to community-based initiatives in Louisiana. This session will include a presentation on the successful outreach initiatives undertaken in the State and the outcomes of these efforts on local communities and the State. This session will also include information on the challenges facing community outreach initiatives in the aftermath of Hurricanes Katrina and Rita and the resources available to support these programs. There will also be information on newly adopted legislation and IRS procedures designed to assist those impacted by the hurricanes. **Robin Taylor,** *Senior Tax Analyst; SPEC; Rural Outreach and Assistance Demonstration (ROAD), IRS* The IRS will provide information on strategies and resources to engage in outreach to TANF clients and low-income families in rural communities.
10:30 AM – 10:45 AM	**Break**
10:45 AM – 11:15 AM	**Sharing Selected Organizational Strategies To Reach Out to Communities Impacted by the Hurricanes** ***Facilitator:*** **David Cunningham** **Peter Dangerfield,** *Executive Director, Total Community Action, New Orleans* **Lola May,** *Executive Director, Queensborough Neighborhood Association, Inc.* **Margaret Lowery,** Project Director, Grambling State University
11:15 AM – 11:45 AM	**Helping Families in Need: A Community Responds** ***Facilitator:*** **Adren Wilson,** *Assistant Secretary, Louisiana DSS* **Stacy McQuillin,** *U.S. Department Housing and Urban Development (HUD), Regional Office* **This session will provide an overview of emergency support services for hurricane-impacted families.** • Status and placement of relocated families • Support operations continuing after January 1, 2006
11:45 AM – 12:00 PM	**Break**

12:00 PM – 1:00 PM	**The Media as Community Partners on EITC/CTC Outreach Initiatives** ***Facilitator:*** **Leon McCowan** **Strategies and methods for developing the media outlets as partners on the EITC/CTC** ***Presenters:*** **Adell Brown**, *Vice Chancellor for Finance and Administration, LSU, Agriculture Center (AG)* **Chris Rogers**, *Director of Communications and Technology, LSU, AG* Media outlets can be instrumental partners in supporting EITC and CTC community outreach initiatives. This session will provide insight on strategies to build relations with newspapers, radio stations, and television networks and to establish media organizations as partners on EITC/CTC community outreach efforts.
1:00 PM – 2:30 PM	**Regional Planning and Community Planning Session** ***Facilitator:*** **David Cunningham** **Team Leaders:** ***Lois Bell,*** *Division Director, OFA, HHS* **Robin Taylor**, *Senior Tax Analyst, SPEC, ROAD, IRS* **Jan Pretus**, *Territory Manager, SPEC, IRS* **Elsie Chaisson**, *Children/Family Program Specialist, ACF* Teams will be working together to develop their local plans and strategies to promote EITC/CTC outreach and free income tax filing services. Strategies will include networking with employers, civic leaders, faith-based organizations, community champions, social service networks, and the American Red Cross. Strategies will also include special income tax filing events and strategies to serve one to two rural areas in surrounding communities.
2:30 PM – 2:45 PM	**Break**
2:45 PM – 3:10 PM	**Regional and Local Planning Team Reports** **(The regional and community planning teams will report on their strategies.)** ***Facilitator:*** **David Cunningham**
3:10 PM – 3:30 PM	**Next Steps and Closing Remarks** ***Facilitator:*** **Lois Bell***, Director, Division of State & Territory TANF Management, ACF, OFA* **Adren O. Wilson***, Assistant Secretary, Louisiana DSS, HHS Regional Office Representative* **Grant Collins**, *Deputy Director, OFA, ACF, HHS*

U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES
Administration for Children and Families
Office of Family Assistance

Earned Income Tax Credit (EITC) Louisiana Initiative:

Helping Families Rebuild After Hurricane Katrina

Attendee List

November 30, 2005

November 30, 2005 :: Baton Rouge, LA

U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES
Administration for Children and Families
Office of Family Assistance

Earned Income Tax Credit (EITC) Louisiana Initiative:
Helping Families Rebuild After Hurricane Katrina

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U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES
Administration for Children and Families
Office of Family Assistance

Earned Income Tax Credit (EITC) Louisiana Initiative:

Helping Families Rebuild After Hurricane Katrina

Implementation Strategies and Updates

Agenda

January 31, 2006

November 30, 2005 :: Baton Rouge, LA

U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES
Administration for Children and Families
Office of Family Assistance

Earned Income Tax Credit (EITC) Louisiana Initiative:

Helping Families Rebuild After Hurricane Katrina

IMPLEMENTATION STRATEGIES AND UPDATES

AGENDA

January 31, 2006

On November 30, 2005, the U.S. Department of Health and Human Services (DHHS), Office of Family Assistance (OFA) convened a planning workshop among Louisiana State agencies, community organizations, and faith-based stakeholders to develop strategies for tax year 2005 and to target outreach to Hurricane Katrina evacuees, former TANF clients, and other low-income families. The workshop resulted in the development and commitment of new resources and tools to promote enhanced outreach on the EITC and on the provision of free income tax filing services for families and low wage earners impacted by Hurricane Katrina. This forum is designed to share information and to update partnering organizations on the status of projects, events, and activities being implemented to achieve the goals as established at the November 30, 2005, workshop. This forum will also provide an opportunity to share information and to collaborate on new and developing resources that may assist Hurricane Katrina evacuees, former TANF clients, and others who may achieve financial self-sufficiency.

2:00 PM – 2:05 PM

Welcome and Introductions:

Adren O. Wilson, *Assistant Secretary, Louisiana Department of Social Services (LDSS)*

Grant Collins, *Deputy Director, OFA, Administration for Children & Families (ACF), DHHS*

Elsie Chaisson, *Family and Children Specialist, ACF, Dallas Regional Office, DHHS*

Host: **James Butler,** *Senior Program Specialist, Office of Family Assistance, DHHS*

2:05 PM – 2:15 PM

Initiatives undertaken by the LDSS to support the program outcomes from the November 30, 2005, planning workshop:

Adren O. Wilson*, Assistant Secretary, LDSS and staff*

- Released 17 mini grants to support community outreach on the EITC;
- Established a toll-free telephone number to locate Volunteer Income Tax Assistance (VITA) sites: 1(866) LA HELP U
- Secured information on FEMA temporary housing locations
- Added community groups to LISTSERV of agencies and organizations assisting hurricane evacuees
- Reached out to faith-based leaders and data-base updaters with EITC eligibility criteria and VITA site locations
- LDSS regional offices and community organization outreach activities
  - Super Tax Day, statewide activities

Presentation Support: **Larry Ferdinand**, *Coordinator, Solutions to Poverty, LDSS;*

Cheryl Turner, *Community Specialist, Office of Family Support (OFS), LDSS.*

Moderator: **David Cunningham,** *Consultant, Self-Sufficiency initiatives and the EITC, OFA (contractor)*

2:15 PM – 2:20 PM (5 Minutes)	**Volunteer Income Tax Assistance (VITA), Outreach and Implementation Strategies To Assist Louisiana Residents and Hurricane Katrina Evacuees** **Jan Pretus**, *Territory Manager for Louisiana and Mississippi, Stakeholder, Partnerships, Education and Communication (SPEC), Internal Revenue Service (IRS)* The IRS SPEC office, working in collaboration with LDSS and community organizations, has established VITA sites for the 2005 income tax filing season and has worked to support special outreach efforts for families impacted by Hurricane Katrina. • Katrina Emergency Tax Relief Act, updates • Status of VITA site locations for 2006 • Grass Roots Tax Filing Day, February 11, 2006, New Orleans, LA. ***Moderator:*** **David Cunningham**
2:20 PM – 2:25 PM (5 Minutes)	**HUD, Support Services for Public Housing Residents impacted by Hurricane Katrina** **Ronald T. Ashford**, *Director, Hope VI Community and Supportive Services, HUD* **Crystal Jones-Taylor**, *Louisiana Recovery Corporation; HUD* Public housing residents have been displaced due to the hurricane. New programs have been initiated to assist public housing residents that have been impacted by the hurricane. HUD has also initiated programs to provide EITC outreach and income tax filing assistance to public housing clients. • Update on public housing residents displaced by the hurricane • New social services to assist Hurricane Katrina displaced public housing residents - Katrina Aid Today Initiative, United Methodist Committee on Relief (UMCOR), sponsored by FEMA. www::\Katrina About Katrina Aid Today's Work.htm ***Moderator:*** **David Cunningham**
2:25 PM – 2:47 PM (Approximately 2 minutes for each report)	**Progress reports from around the State: Sharing information on regional outreach strategies being implemented to assist former TANF clients, Katrina community evacuees, and low-income residents** Community organizations and the Louisiana OFS, LDSS, regional offices will have the opportunity to share information on the status of their EITC outreach efforts and activities to assist hurricane impacted communities. LDSS regions will share this information: • Special outreach to Hurricane Katrina community evacuees • Development of media partners and events • Establishment of mobile tax assistance projects • Organizational goals for 2006 ***Moderator:*** **David Cunningham**

2:47 PM – 2:50 PM (3 Minutes)	**Update on IRS activities to provide EITC and income tax filing assistance to hurricane evacuees now residing outside Louisiana** **Mike McBride,** Chief, Educational Institutions and Government Partnerships, IRS ***Moderator:*** **David Cunningham**
2:50 PM – 2:55 PM (5 minutes)	**Grant opportunity to help community organizations expand their capacity to provide outreach to former TANF clients on the EITC** **Sheldon Shalit,** *Senior Program Manager, Office of Community Services* ***Moderator:*** **David Cunningham**
2:55 PM – 3:00 PM (5 minutes)	**Next Steps and Wrap-up** **Adren Wilson,** *Assistant Secretary**,** LDSS* **Lois Bell**, *Director, Division of State & Territory TANF Management ACF, OFA, DHHS.*