



WELFARE PEER TECHNICAL ASSISTANCE NETWORK
Strengthening Economic Self-Sufficiency
for
Missouri Families



Columbia, MO
June 26-27, 2007

DAY ONE

12:30 PM – 1:00 PM

Registration

1:00 PM – 1:15 PM

Welcoming Remarks

Lisa Washington-Thomas, Federal Project Officer, Welfare PEER Technical Assistance (TA), DHHS, ACF.

Carol Barnett, Director Partnership and Product Development, Internal Revenue Service (IRS), Atlanta Representative, Department of Social Services (DSS), State of Missouri

Jo-Britt-Rankin, Associate Dean, Human Environmental Sciences Extension; Administrative Director, Family Nutrition Education Program University of Missouri

1:15 PM – 2:15 PM

Helping families achieve financial self-sufficiency through effective use of the Earned Income Tax Credit (EITC) and Child Tax Credit (CTC) programs.

Moderator: Lisa Washington-Thomas, Federal Project Officer, Welfare Peer Technical Assistance (TA), DHHS, ACF

A Shared Commitment between Federal and State agencies to promote former TANF client and low wage worker, education and understanding on the EITC and CTC programs. This session will include information on the Department of Health & Human Services (DHHS), ACF, initiatives and vision of the EITC and CTC programs as important tools for helping families move toward self-sufficiency.

David Cunningham, Consultant, EITC and Self Sufficiency Initiatives for the Office of Family Assistance (OFA), Health and Human Services (HHS) (contractor)

Shared strategies for creating dynamic education outreach opportunities to promote the EITC and CTC programs. Employers, business leaders, government and community organizations leading efforts to assure that former TANF clients and low-wage earners participate in work support programs. Through such creative collaboration and partnerships on EITC /CTC outreach, individuals and families uniquely contribute to the growth of the local economy. This session will include information on successful collaborative outreach initiatives around the country.



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A Shared Commitment on EITC Outreach

Randy R. Eichholz, Program Development Specialist, Family Support Division, Department of Social Services (DSS), State of Missouri

Jeannie L. Chaffin, Social Service Manager, Family Support Division, Department of Social Services (DSS), State of Missouri

Keri McCrorey, Community Services Director, East Missouri

The State of Missouri, DSS works effectively with community social service networks to promote outreach on the EITC / CTC programs. This session will include information on DSS initiatives on EITC /CTC outreach and highlight their collaborative efforts in working with community service agencies to promote citizen participation in the programs.

2:05 PM – 2:35 PM

An overview of the Volunteer Income Tax Assistance (VITA), EITC outreach and available resources to support these programs.

Kathryn Lett-Deathe, Territory Manager, Stakeholder Partnerships, Education & Communication (SPEC), Internal Revenue Service (IRS), Missouri

This presentation will highlight VITA program updates, special projects, federal policy, regulatory changes and initiatives to expand the availability of community outreach programs in Missouri.

IRS strategies for building community partnerships on EITC /CTC outreach and Volunteer Income Tax Assistance (VITA) services in rural communities.

Robin Taylor, Senior Tax Specialist, Stakeholder Partnerships, Education & Communication (SPEC), IRS

Successful strategies for organizing VITA and EITC outreach activities in rural communities.

2:35 PM – 2:50 PM

Networking Break

2:50 PM – 3:35 PM

Profiles and Insights on Working Coalitions and Partnerships:

Moderator: Jason C. Dischler, SPEC, IRS, Kansas City

Missouri offers several examples of successful community coalitions and partnerships on EITC/CTC outreach and the provision of Volunteer Income Tax Assistance Services for low wage earners.



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These services vary in their organization, partnership relationships, and decision-making structures. This session will share critical insights on a few of these working coalitions, their organizational challenges, keys to success and accomplishments.

Andrew Zumwalt, Director of the MOTAX (Missouri Taxpayer Education Initiative). University of Missouri at Columbia-Extension

Catherine Oesterling, Extension Associate, University of Missouri at Trenton- Extension

In 2005, the MOTAX initiative, the University of Missouri Extension processed an estimated 2.4 million in Income Tax refunds, saving 2,381 individuals and families an estimated \$416,675 in tax preparation fees. Through Extension, MOTAX operates thirty-one free income tax assistance sites for low and moderate-income families.

Joyce Schau, Chairperson, Kansas City Metro Coalition (KC Cash Campaign)

The KC CASH Coalition provides Volunteer Income Tax Assistance services at ten locations in the Greater Kansas City area (including Johnson County, KS and North of the Missouri River in Kansas City, MO.) The program has a partnership network of 26 organizations and offices. The coalition processed 3,254 returns for 2006. The network also promotes Individual Development Accounts (IDA's) and financial literacy education.

3:35 PM – 4:20 PM

Tax Wise As A Resource for Developing Information, Data Resources and Tracking the Statewide Impact of EITC Community Outreach Initiatives.

Moderator: Lynn McMahan, SPEC, IRS, St. Louis

Kim Manuel, Director, National Relationships, Universal Tax Systems, INC (Tax Wise)

Teresa Mathis, IRS Relationship Account Manager, 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 prove to be an additional 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



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reports, which may help demonstrate the affirmative impact free income tax services provide the community.

4:20 PM – 4:50 PM

An overview of the Federal Deposit Insurance Corporation, (FDIC), Money Smart Program.

*Moderator: David Cunningham, EITC and Self Sufficiency Initiatives Consultant for the Office of Family Assistance (OFA), Health and Human Services (HHS) (*Contractor)*

Cathy Davis, Community Affairs, Federal Deposit Insurance Corporation (FDIC), Kansas City, MO

This session will introduce the FDIC Money Smart Program as a tool for helping individuals and working families develop an understanding of their financial resources.

4:50 PM – 5:40 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)*

Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS;

Robin Taylor, Senior Tax Specialist, Stakeholder Partnerships, Education & Communication (SPEC), IRS

Dan Houlahan, TANF/ Special Initiatives, Region VII, DHHS, ACF
Dee Draine, , Region VII, DHHS, ACF

Both urban and Rural communities face unique challenges in developing EITC outreach and VITA services. During this session Urban/Metropolitan areas and Rural, community / small Towns will meet respectively to identify the unique issues, challenges and opportunities they face in organizing or maintaining an initiative on EITC / CTC outreach and income tax filing services. Each group will work to develop strategies for organizing initiatives in their communities. **(Breakout Session)**



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DAY TWO

8:30 AM – 9:30 AM

Essential elements for organizing a VITA site and EITC /CTC outreach initiative.

*Moderator: David Cunningham, EITC and Self Sufficiency Initiatives Consultant for the Office of Family Assistance (OFA), Health and Human Services (HHS) (*Contractor)*

The panel will review strategies and resources needed for developing local EITC/CTC outreach initiatives and volunteer income tax services for low wage earners in both metropolitan and rural communities.

Panel Discussion:

Desmond Leong, Tax Ministry Director, Friendly Community Tax Program Coalition, St Louis, MO

Diana Behm, Financial Consultant, Tulsa Oklahoma (Former CAA Project Coordinator, Mobile Income Tax Services, Jay Oklahoma)

9:30 AM – 10:15 AM

Developing A Mobile Multi-Community Outreach Program.

Moderator: David Camporeale, Program Specialist, DHHS, ACF

Diana Behm, Financial Consultant, Tulsa Oklahoma (Former CAA Project Coordinator, Mobile Income Tax Services, Jay Oklahoma)

Expanding the capacity to provide EITC / CTC outreach and VITA services to low-income neighborhoods and communities, through the development of a Mobile Outreach Program. These services enable an established EITC /CTC education project or VITA service help communities in need of these services that currently do not have ability to host their own project site. This session will include information and strategies for developing and managing a Mobile Multi-Community Tax Filing Assistance and EITC /CTC outreach program.

10:15 AM – 10:30 AM

Break



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10:30AM -11:30 AM

Recruiting and Developing Volunteers for EITC / CTC Outreach Initiatives.

Moderator: Dee Draine, Senior Program Specialist, DHHS, ACF, Region VII

Panel Presentation on Effective Volunteer Recruitment and Training Strategies.

Volunteers are an important and critical element of an EITC / CTC outreach and income tax filing assistance program. This session will focus on strategies for recruiting and training volunteers.

Professor Sandra Byrd, Professor, Director Low Income Tax Clinic (LITC), Missouri State University-Springfield, Across The Lifespan (ATLS)

*Desmond Leong, Director of Tax Ministry, Friendly Temple Missionary Baptist Church
St Louis, MO*

Bob Gaffner, Executive Director, Gateway EITC Community Coalition, St. Louis MO

Teri Roberts, Financial Education Coordinator, Central Missouri Community Action

*Annette Fitzgerald, Missouri State University – Extension,
Missouri State University – Extension*

11:30 AM – 12:30 PM

State and Regional Planning Session I
First of two strategic planning workshops.

Municipal and Rural Community Outreach Planning Session

*Moderator: David Cunningham, EITC and Self Sufficiency Initiatives Consultant for the Office of Family Assistance (OFA), Health and Human Services (HHS) (*Contractor)*

Carol Barnett, Director Partnership and Product Development, Internal Revenue Service (IRS), Atlanta

Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS;

Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education & Communication, IRS



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J. Lynn McMahan, Senior Tax Specialist, , Stakeholder Partnerships, Education & Communication, IRS
Jason C. Dischler, Stakeholder Partnerships, Education & Communication, IRS
Dee Draine, , Region VII, DHHS, ACF

State Level Collaboration:

State level organizations will meet together to explore the operational needs of their agencies to help maintain and enhance VITA services and educational outreach activities on the EITC/CTC programs.

Regional Breakouts Groups:

Increasing both the awareness of and participation in the EITC/CTC programs, as well as the availability of VITA sites, require planning and the development outreach partnerships. Participants will meet together by geographic areas in the State and initiate the necessary planning to increase the availability of VITA services and outreach on the EITC / CTC programs.

(The work from this session will continue during State and Regional Planning session II and will result in strategies and action plans to take back to agencies, employers and local communities for implementation.)

12:30 PM -1:45 PM

(Working Lunch Session.)

Moderator: Lisa Washington-Thomas, Federal Project Officer, Welfare Peer Technical Assistance (TA), DHHS, ACF

Overview IRS Marketing Resources on the EITC:

Carol Barnett, Director Partnership and Product Development, Internal Revenue Service (IRS), Atlanta

United Way Agencies as Partners in promoting Self-Sufficiency programs and community initiatives:

Cassandra Kaufman, Director , Community Economic Development, United Way of Greater St. Louis

The United Way is a long time partner in helping to address help hard working families and individuals increase income, build savings and financial assets leading to independence. This initiative will soon roll out in the State of Missouri and may result in enhanced local level collaboration with United Way



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agencies on EITC/CTC outreach and promotion of VITA services.

A Beneficiary Perspective On The EITC Program.

Robin Acree, Director GRO (Grass Roots Organizing)

Stacey Applebee, GRO Member

Antonio Williams, GRO Member

Teri Roberts, Financial Education Coordinator, Central Missouri Community Action

Sheila Durnil, IDA Client, Central Missouri Community Action

The EITC, a work support program that changes lives and helps families move toward financial independence. Insights on the impact of the EITC and asset building programs from individuals and families who can tell the story best.

1:45 PM – 2:15 PM

The Road To Asset Building and Financial Self-Sufficiency: Programs and Resources.

Moderator: Andrew Zumwalt, Director MOTAX

An Overview of the Assets For Independence: Individual Development Account (IDA) program:

Julie Riddle, Director Family Support, The Family Conservancy, Kansas City, MO

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 Assets For Independence, IDA program.

2:15 PM – 2:30 PM

Break



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2:30 PM – 3:30 PM

**Empowerment Through Financial Literacy:
Information on Financial Literacy programs in Missouri.**

**Review of Financial Literacy Resources available
Through the University of Missouri-Extension.**

*Brenda Procter, M.S. , Associate State Extension Specialist &
Instructor, University of Missouri, Human Environmental
Sciences, Department of Personal Financial Planning.*

The University of Missouri-Extension offers several financial literacy educational resources to the community. This session will familiarize Roundtable participants with these financial literacy tools.

3:30 PM – 4:15 PM

**State and Regional Planning Session II:
Second of two strategic planning workshops.**

*Moderator: David Cunningham, EITC and Self Sufficiency
Initiatives Consultant for the Office of Family Assistance (OFA),
Health and Human Services (HHS)* (*Contractor)*

*Carol Barnett, Director Partnership and Product Development,
Internal Revenue Service (IRS), Atlanta*

*Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education
& Communication, IRS;*

*Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships,
Education & Communication, IRS*

*J. Lynn McMahan, Senior Tax Specialist, , Stakeholder
Partnerships, Education & Communication, IRS*

*Jason C. Dischler, Stakeholder Partnerships, Education &
Communication, IRS*

Dan Houlahan, TANF/ Special Initiatives, Region VII, DHHS, ACF
Dee Draine, , Region VII, DHHS, ACF

State level Organizations: These groups will meet for the second time and identify strategies and action steps to improve sustain and expand VITA services and educational outreach activities on the EITC/CTC programs.

Regional Breakouts Groups:

Participants will meet together by geographic areas and refine and social service agencies throughout Missouri. In addition, their plans and strategies to increase the availability of VITA services and outreach on the EITC / CTC programs. The outcomes will generate new partnerships and collaborations



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between government agencies, employers, and business leader's result in greater citizen support for and participation in the EITC / CTC programs and a financial boost to local and the state economy.

4:15 PM -4:45 PM

State and Regional Planning Group Reports:

*Moderator: David Cunningham, EITC and Self Sufficiency Initiatives Consultant for the Office of Family Assistance (OFA), Health and Human Services (HHS) (*Contractor)*

The Planning Groups will share highlights of their proposed community initiatives on EITC /CTC outreach and support for VITA services.

4:45 PM – 5:00 PM

Closing Remarks and Evaluation

Lisa Washington-Thomas, Federal Project Officer, Welfare PEER Technical Assistance, DHHS, ACF.