



# 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	<b>Welcome, Introductions and Vision Statement</b> <i>Honorable Councilmember, Elfreda Higgins, Garden City</i> <i>Greg Kunz, Deputy Administrator, Division of Welfare Administration, Idaho Department of Health and Welfare</i> <i>Carol Barnett, Director Product and Partnership Development, Internal Revenue Service</i> <i>Mary Chant, Executive Director, Community Action Partnership Association</i>  <i>Moderator: James D. Butler, Program Specialist, Office of Family Assistance, Health &amp; Human Services</i>
9:00 AM– 9:45 AM	<b>Achieving Financial Self –Sufficiency For Low Wage Earners and TANF Clients</b> <i>Moderator: James D. Butler, Program Specialist, Office of Family Assistance, Health &amp; Human Services</i>  <b>A Shared Commitment on EITC Outreach</b> <i>Greg Kunz, Deputy Administrator, Division of Welfare Administration, Idaho Department of Health and Welfare</i> 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.  <i>David Cunningham, Consultant, EITC and Self Sufficiency Initiatives for the Office of Family Assistance (OFA), Health and Human Services (HHS) (contractor)</i> 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	<b>An overview of the EITC Program and SPEC Resources to Support Local Community Initiatives.</b> <i>Barbara Sowder, Territory Manager, IRS SPEC, Portland Territory</i>  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.  <b>The Dynamics of Expanding EITC Outreach Partnerships In Rural Communities.</b> <i>Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education &amp; Communication &amp; Rural Strategy, IRS</i>  Successful strategies for organizing VITA and EITC outreach in rural communities.
10:30 AM – 10:45 AM	Break

<p><b>10:45 AM – 11:30 AM</b></p>	<p><b>Key Initiatives: Working Coalitions and Partnerships in Idaho</b>  Moderator: <i>Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory</i>  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.</p> <p><i>Each of the programs will show case their innovative or best practices for EITC / CTC outreach and asset building initiatives.</i></p>
<p><b>11:30 AM– 12:30 PM</b></p>	<p><b>Strategies For Developing Community Coalitions And Partnerships.</b>  Moderator: <i>Mary Chant, Executive Director, Community Action Partnership Association</i></p> <p>Panel presentation:  <b>Strategies For Developing Local Coalitions and Partnerships:</b>  <i>Delverne Seaman, Earned Income Tax Credit Coordinator, Partners For Prosperity, Blackfoot, ID</i>  <i>Rob Christensen, Boise City, ADA County Housing Authority; Coalition For Economic Improvement,, Treasure Valley, ID</i>  <i>Marcia Munden, Volunteer Coordinator / Youth Coordinator, Catholic Charities, Boise, ID</i></p>
<p><b>12:30 PM– 1:30 PM (Working Session)</b></p>	<p><b>Working In Partnership To Build Strong Families, Enhance Financial Self-Sufficiency And Self-Determination For Idaho Families.</b></p> <p><b>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</b>  <i>Randy Fiser, Vice President, Corporate Voices for Working Families, Washington, D.C.</i></p> <p><b>Recognition of Business Leaders, Civic Champions Supporting Local Initiatives On Asset Building:</b>  Moderator: <i>Carol Barnett, Director Product and Partnership Development, Internal Revenue Service</i></p> <p><i>1) Wells Fargo Bank 2) U.S. Bank 3) Mayor's Office &amp; City of Boise, Idaho, 4) City of Idaho Falls 5) Idaho Credit Union League</i></p> <p>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.</p>
<p><b>1:30 PM– 2:30 PM</b></p>	<p><b>Municipal and Rural Community Outreach Planning Sessions.</b>  Moderator: <i>David Cunningham, EITC and Self Sufficiency Initiatives Consultant for the Office of Family Assistance (OFA), Health and Human Services (HHS)*</i>  (*Contractor)  <i>Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education &amp; Communication &amp; Rural Strategy, IRS</i>  <i>Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education &amp; Communication, IRS;</i>  <i>Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education &amp; Communication, IRS ;</i></p>

	<p><i>Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory</i></p> <p>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.</p>
<b>2:30 PM– 2:45 PM</b>	<b>Break</b>
<b>2:45 PM – 3:30 PM</b>	<p><b>Engaging In Targeted Outreach to Reach Low Income Families.</b>  <i>Moderator: Delverne Seaman, Earned Income Tax Credit Coordinator, Partners For Prosperity, Blackfoot, ID</i></p> <p><i>Paul Zelus, Program Planning &amp; Development, Partners for Prosperity, Blackfoot, ID</i>  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.</p>
<b>3:45 PM – 4:30 PM</b>	<p><b>Regional Planning Sessions I: Building Local Partnership Networks.</b>  <i>Moderator: David Cunningham, Consultant, EITC and Self Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)</i></p> <p><i>Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education &amp; Communication &amp; Rural Strategy, IRS</i>  <i>Carol Quiller, Tax Analyst, Stakeholder Partnerships, Education &amp; Communication, IRS;</i>  <i>Robin Taylor, Senior Tax Analyst, Stakeholder Partnerships, Education &amp; Communication, IRS ;</i>  <i>Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory</i></p>
<b>4:30 PM – 5:15 PM</b>	<p><b>The Road To Asset Building and Financial Self-Sufficiency: Programs and Resources</b>  <i>Moderator: Mary Chant, Executive Director, Community Action Partnership Association</i></p> <p><b>An Overview: Idaho, Individual Development Accounts (IDA);</b>  <i>Melissa Krucker, Community Impact Coordinator, United Way Treasure Valley</i></p> <p>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.</p>
<b>5:30 PM– 6:30 PM</b>	<b>Reception</b>

<b>DAY II</b>	<b>May 10, 2007</b>
<b>8:00 AM– 8:30 AM</b>	<p><b>Implementing Effective Outreach Models and Demonstrating Community Impact.</b>  <i>David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)</i></p> <p>Review of key concepts and organizational strategies to facilitate development of an engaged Social Marketing Campaign to promote EITC/CTC outreach.</p>
<b>8:30 AM– 9:30 AM</b>	<p><b>Empowerment Through Financial Literacy.</b>  <i>Moderator: Jessica Sotelo, Executive Director, Partners for Prosperity</i></p> <p><b>Overview of the FDIC Money Smart program and financial literacy resources.</b>  <i>David Cunningham, President Cunningham Group, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)</i></p> <p><b>Review of Financial Literacy programs and resources available in Idaho.</b>  <i>Beverly Healy, Chairman &amp; Extension Educator, University of Idaho- Extension</i></p> <p>This session will introduce the FDIC Money Smart Program and share information on available financial literacy resources.</p>
<b>Workshop A: 9:30 AM– 10:30 AM (Concurrent Session)</b>	<p><b>Tax Wise As A Resource for Developing Information, Data Resources and Tracking the Statewide Impact of EITC Community Outreach Initiatives.</b>  <i>Moderator: Donna Weddle, Senior Tax Specialist, IRS SPEC, Portland Territory  Kim Manuel, Director, National Relationships, Universal Tax Systems, Inc. (Tax Wise)</i></p> <p>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.</p>
<b>Workshop B: Session I 9:30 AM– 10:30 AM (Concurrent Session)</b>	<p><b>Scale and Sustainability: Strategies For Determining When To Expand And How To Sustain Your Local Initiative.</b>  <i>Moderator: Delverne Seaman, Earned Income Tax Credit Coordinator, Partners For Prosperity, Blackfoot, ID  Jean Hunt, Executive Director, Campaign for Working Families, GPUAC  Philadelphia, PA</i></p> <p>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.</p>
<b>10:30 AM – 10:40 AM</b>	<b>Break</b>
<b>10:40 AM– 11:30 AM</b>	<p><b>Regional Planning Sessions II: Building Local Partnership Networks.</b>  <i>Moderator: David Cunningham, Consultant, EITC and Self Sufficiency Initiatives, Office of Family Assistance (OFA), Health and Human Services (contractor)</i></p> <p><i>Mike McBride, Chief Educational Institutions, Government and Tribal Partnerships; National Coordinator Stakeholder Partnerships, Education &amp; Communication &amp; Rural Strategy, IRS</i></p>

*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*