

# Nebraska Statewide EITC Coalition

***Mission Statement:*** The Nebraska Statewide EITC Coalition promotes through the claiming of tax credits, quality volunteer tax return preparation for low-income Nebraskan's with a goal of providing educational tools and community resources for family asset development.



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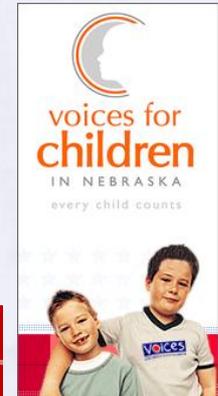
# How We Were Formed

In 2006, Community Action of Nebraska, the IRS/SPEC office, Nebraska Dept. of Human Services, and a few other key partners got together to form the basic EITC Statewide Coalition in order to facilitate training and materials to help spread the word about EITC and VITA. Gaining partners along the way, and finding funding to provide for a full time coordinator, the coalition gained strength and momentum and continued to grow.

In October 2008, the position was filled and I became the Nebraska Statewide EITC Coordinator. We have been working hard to build the coalition up and gain more key partners to ensure sustainability and we have learned to evolve as needs develop in our State.

By 2009 we were approved by the IRS/SPEC office to be considered a full-fledged and recognized entity. We continue today to build strength and capacity so that we can provide this much needed and invaluable service to the low and moderate income individuals and families throughout our great state.

# Nebraska Statewide EITC Coalition Partners



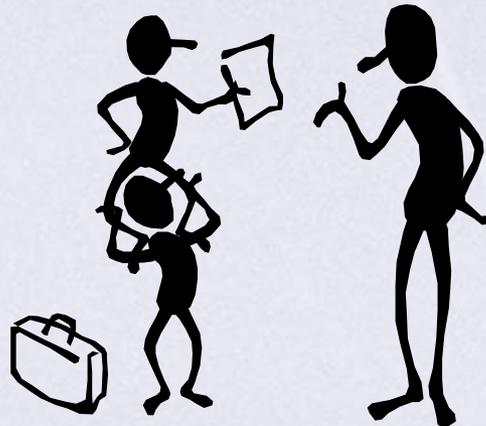
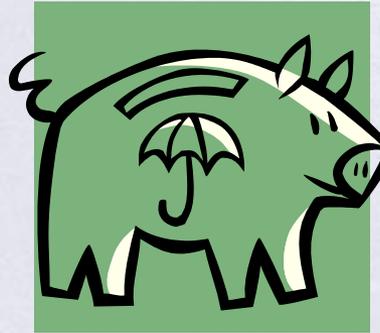
# Why Build a Statewide Coalition?

- ▶ Create a platform for awareness and education of EITC and VITA
  - ▶ Things to remember when dealing with clients are obstacles such as limited education, language barriers, and varying degrees of financial aptitude and intellectual capacity
- ▶ Form a network of community resources throughout your state
  - ▶ Information should be tailored to local needs to be effective and trusted in your community
  - ▶ Family economic supports are most powerful when linked together with other resources

# Why Build a Statewide Coalition?

- ▶ Assist organizations and agencies in providing free volunteer tax prep to those in need in your community
  - ▶ Provide outreach to contact eligible families and individuals who do not currently claim EITC or CTC
  - ▶ Provide free tax preparation services to preserve the value of the credits received by the tax payer
- ▶ Provide Asset Building strategies to low and moderate income individuals
  - ▶ These can include goals such as home or car ownership, IDA accounts, savings and checking accounts, financial literacy training, and retirement plans
  - ▶ Provide information on asset building because this is the key to gaining economic self-independence!

# Key Components of a Statewide EITC Coalition



- ▶ Financial Literacy Training: Train the Trainers
- ▶ Asset Building Opportunities
- ▶ Partnerships throughout the State
- ▶ Collaboration of various agencies for support

# Partnership Ideas



- ▶ News Media Outlets
- ▶ Employers
- ▶ Social Service Agencies
- ▶ Non-Profits
- ▶ Federal, State and Local Government Agencies
- ▶ Youth Organizations
- ▶ Colleges and Universities
- ▶ Churches or Synagogues
- ▶ AARP, United Way and other National Organizations

# So we have a Statewide Coalition...

## How do we get funding?

- ✓ Department of Health and Human Services:
  - Office of Children and Family Services Grant
- ✓ Local or State Charitable Foundations
- ✓ Private Donors
- ✓ Statewide Non-Profit Organizations that would be willing and able to expand services
- ✓ Fund-Raisers
- ✓ Local Colleges or University Programs
- ✓ Federal, State and Local Grants
- ✓ Don't Forget to look to your Statewide Partners for financial support as well!

# Where Do We Go From Here?

- Secure current and future funding sources
- Search for partners/contact your IRS SPEC office for assistance
- Create a game plan: Form the mission and goals for your coalition
- Brand your coalition: logo and name are essential and should remain the same throughout
- Begin gathering and creating a library of resources for both new partners and for information on EITC and VITA
- Form committees for your coalition and recruit members to begin to getting work done
- And most important of all....

Start spreading the word!!





*For More Information on the Nebraska Statewide EITC  
Coalition, Please contact:*

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**[www.canhelp.org/EITC.htm](http://www.canhelp.org/EITC.htm)**

*Developing an EITC and Asset-Building  
Statewide Coalition*

**First Annual EITC/Asset-Building Statewide Coalition Meeting  
Savannah, Georgia  
June 28, 2010**

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[ggunn@wustl.edu](mailto:ggunn@wustl.edu)  
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# Defining Asset-Building Coalitions

**Asset -building coalitions are a diverse alliance of organizations who cooperate in joint action to institute a broad agenda of asset-building policies and programs that support low-income individuals, families, and communities.**

# State Asset Building Coalition Trends

- Many started as IDA Coalitions with targeted goals
  - IDA policy, collaboration of services, sustainable funding sources
- Others began as EITC or other type of collaborative arrangement
- Developed through community-based organizations, mandated by state government, or through legislation
- Active, formed, forming

## State of Assets Coalition

- 35 IDA and/or asset building coalitions
- 4 regional asset coalitions and 1 bi-state coalition
- 1 collegiate EITC/VITA Coalition (HBCUs)
- 4 Native American Assets Coalitions
- 9 states --comprehensive asset development reports
- 18 states have hosted a statewide meetings
- 10 states have produced a full report
- 21 states have a website or link to reports and publications
- 4 states are registered as 501 (c) 3 organizations
- 14 coalitions have/had funding support
- 3 National Statewide Assets Policy Coalition Conferences
- Most have a policy focus

# Characteristics of Effective Asset-Building Coalitions

- Common goals for the coalition are established by members
- Early establishment of ongoing coalition leadership
- Special dedication to purpose is exhibited by a core group of coalition members
- Establishment of connections with well-known asset building intermediaries
- Operational resources have been secured
- Open line of communications have been established
- Educational venues and activities related to both establishing asset-building policies and initiatives and ongoing group expertise have been developed or negotiated

# Challenges

- Coalition work is slow
- Inclusion of diverse groups (ethnic, geographically, and purpose)
- Creating a need for greater investment in community (variety and frequency)
- Development of policy agenda, focus, advocacy, and implementation
- Sustaining membership and leadership support to maintain involvement in coalition effort
- Funding, funding, funding

# Strategic Assessment

- ▣ Began March 2008
- ▣ Developed and administered by CSD
- ▣ Administered online to organizations in all four states
- ▣ Objective
  - Discover the scope (including numbers, kinds of services, programs, and service areas covered), nature, and clientele of non-profit organizations and other key stakeholders in the region

## Main Objectives

- ▣ Identify member organizations connected to asset-building programs and policy related coalitions and networks in the region
- ▣ Establish baseline data on current asset-building coalitions and networks related to public policy goals and types of services offered by identified coalitions and networks (and member organizations), in the specific areas of asset leveraging, asset protection, asset preservation and hurricane recovery
- ▣ Use data analysis to create strategic plan for partners and member organizations to develop an effective and inclusive asset-building framework and policy agenda for the region; serving to strengthen asset-building efforts and initiatives in the targeted states

## Other Objectives

- ❑ To identify prospective SRABC coalition partners
- ❑ Establish a regional matrix, or framework, that includes integrated profiles of organizations in the four state area
- ❑ Provide technical and program assistance for filling existing gaps in knowledge and expertise related to creating and improving asset-building initiatives and policies in the region
- ❑ Develop field strategy for connecting organizations working on land loss and ownership issues, policies, and initiatives that build capacity and create greater impacts in this area

## Survey Significant Findings

- ❑ Financial education was the number one asset-building program/initiative offered to clients by respondent organizations
- ❑ Need for increased organizational capacity was the number one challenge experienced by respondent organizations, related to offering asset-building programs and services
- ❑ Educational opportunities, including workshops, information sharing efforts, trainings, and classes is the most often used intervention of respondent organizations for delivering asset-building initiatives and services

## Survey Significant Findings

- ❑ Federal government grants and private foundation funding are the two major support sources for organizational offerings of asset-building initiatives and services
- ❑ All seventy respondents stated that their organizations collaborate with other organizations, in some capacity, to strategize and troubleshoot challenges related to delivering asset-building initiatives and services
- ❑ Over half of the respondents partner with other organizations to host annual conferences

## Survey Significant Findings

- ▣ The two most important issues coalitions should address:
  - 1) establishing inclusiveness - serving all populations state/region
  - 2) seriously address issues most important to low-income individuals and families in the state/area
  
- ▣ Over half of the organizations represented in the survey findings participate in some type of public policy advocacy
  
- ▣ 89 percent stated that their organizations participate in some type of coalition activity
  
- ▣ 42 respondents stated that at least one of the coalitions they participate are concerned with asset-building initiatives and/or policies

## Survey Significant Findings

- ▣ 50 percent of respondents stated that coalitions they participate have a statewide reach
- ▣ 45 percent participate in those that have a regional reach
- ▣ Almost half of respondents cite that the coalitions they participate in have been meeting for five years or more
- ▣ Almost 90 percent stated interest in the SRABC
- ▣ The most commonly sought after information (by respondent organizations) needed for completing their work relates to funding issues, including funding streams

## Survey Significant Findings

- ▣ 92 percent are interested in participating in state-level asset-building coalition
  
- ▣ The three most important reasons for coalitions being formed were:
  - 1) To work toward a common cause
  - 2) Education and capacity building for members and other partners
  - 3) Policy advocacy

# Coalition Strengthening

**More inclusive and  
diverse membership**

**Evaluate outcomes of  
IDA program by  
recruiting more  
participants**

**Stable source of  
income to support  
organizers**

**Policy workshops**

**Leadership  
development trainings**

**Coalition development  
trainings**



# Coalition Strengthening

**Involvement from  
private sector**

**Improved use of  
website and online  
technology**

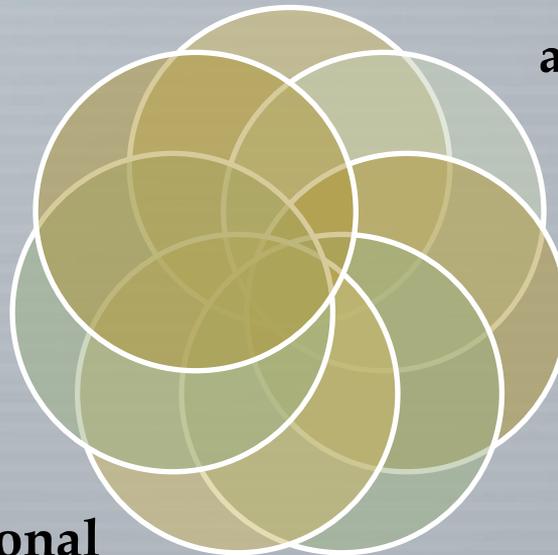
**Network with other  
asset building statewide  
entities**

**Consistent leadership  
toward mission**

**Access to free web  
conference  
technology**

**Stronger organizational  
development with a strategic  
plan**

**TV access to share reliable and  
non-bias information**



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**Link to webpage and publications**

**<http://csd.wustl.edu/AssetBuilding/SAP/Pages/default.aspx>**



# Michigan Statewide EITC Coalition

[www.MichiganEIC.org](http://www.MichiganEIC.org)

Peter Ruark, Statewide Coalition co-Facilitator  
Michigan League for Human Services