



Peer Technical Assistance (TA) Summary

Requesting Agency:	Oklahoma Association of Community Action Agencies
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TA Event:	#119
TA Requested:	The Oklahoma Association of Community Action Agencies (OKACAA) requested technical assistance from the Welfare Peer Technical Assistance Network in order convene a Statewide workshop on EITC where the community action agencies can meet and collaborate with State and County DHS personnel along with the appropriate federal resources.
TA Goal:	To have providers come to one central location in Oklahoma City and network, strategize and plan for next tax year 2006. To raise the level of active participation of the 18 community action agencies and develop a closer tie with DHS, the Oklahoma TANF agency.
TA Format:	Representatives from Federal, State, County and Local Community Action Agencies met over two days as a Roundtable: to network and exchange information about increasing EITC uptake, to discuss best practices as well as challenges for serving the diverse population of Oklahoma, and to develop relationships and build coalitions for collaboration among agencies, businesses and the Federal, State and Local governments.
Sample Evaluations:	<p>“I had the opportunity to work with community partners to set up effective ways to serve our citizens.”</p> <p>“I found many useful tips and contacts out this event.”</p> <p>“I realized exactly what EITC is and that the benefits are higher than I knew.”</p> <p>“It was very informative to see how other agencies are implementing their EITC program.”</p> <p>“It was very helpful to meet with other organizations that are doing the same projects that we are and to have the opportunity to learn new ideas and to share with others.”</p>

Analysis:

The Earned Income Tax Credit (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 asset building 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.

The Roundtable in Oklahoma was attended by Federal agency staff, representatives from the Oklahoma Department of Human Services and Oklahoma Community Action Agencies. The Event was designed to assist existing community agencies the several areas:

- To promote EITC through education,
- To foster peer-to-peer learning,
- To highlight best practices on EITC outreach,
- To promote financial literacy outreach,
- To provide helpful tools for launching an EITC campaign,
- And to facilitate the development of local and regional action plans for immediate implementation.

The Roundtable provided opportunities for information sharing related to the EITC. Roundtable participants were offered numerous presentations detailing the purpose of, and eligibility for, the EITC. Information was provided related to the amount of unclaimed benefit totals from FY 2004 and why TANF recipients as well as Head Start families are good target audiences for an EITC initiative.

The Federal Internal Revenue Service (IRS) made a presentation on the IRS rural outreach initiative, which provided information to agencies interested in participating. Additionally, a representative from the Federal Deposit Insurance Corporation (FDIC) presented information about the MoneySmart curriculum program, which is available to agencies interested in providing financial literacy courses. Also included were presentations by a local representative from the Northeast Oklahoma Community Action Agency on a mobile rural tax preparation program. A representative from the University of Kansas reported on research that indicates that "splitting" of resources may be a method for asset building.

Overall, participants, speakers, and facilitators agreed that the Roundtable was a resounding success that helped to build the statewide and local capacity for Oklahoma to organize local initiatives, access resources, and develop collaborative partnerships related to the EITC. A solid partnership between DHS and the local CAA agencies was established thus achieving the primary goal of the TA request.

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