

# COALITIONS IN COMMUNITY TAX CAMPAIGNS: WHAT WE'VE LEARNED SO FAR AT EITC CAROLINAS



Tiki T. Windley  
*Program Manager*  
MDC  
*Chapel Hill, NC*

# WHAT IS EITC CAROLINAS?

- Started as an outgrowth of the Program for the Rural Carolinas in 2003 in 8 counties in NC and SC
- Year 2 received Casey Foundation funding to go statewide and add urban campaigns
- Now work with:
  - 30 community campaigns in 60 counties
  - Close to 100 tax sites

# STRUCTURE OF EITC CAROLINAS

- No formal affiliation or dues;
- Work with any community tax campaign, only requirement is that they collect and share data;
- New steering committee that includes local campaign coordinators; and
- Staffing:
  - Full-time Executive Director
  - Full-time Program Manager

# WHAT WE DO

Three areas of focus:

- Statewide outreach and advocacy on the EITC, CTC, etc.;
- Support to local tax campaign operations; and
- Linking tax campaigns to asset-building.

# STATEWIDE OUTREACH AND ADVOCACY

- Statewide 800 number with info on eligibility, tax sites, what to bring;
- PSAs in English and Spanish with NC State Treasurer, radio and tv;
- Website with one section for tax campaigns and one for taxpayers: [www.eitc-carlinas.org](http://www.eitc-carlinas.org);
- Statewide conference on Financial Ed and Asset-Building with Treasurer, IDA Collaborative, and Coop Extension; and
- Coordinate with statewide partners.

## SUPPORT TO LOCAL TAX CAMPAIGNS

- Received a federal VITA grant for \$90,000 in 2010 on behalf of 14 local coalitions;
- Submitted a new VITA grant proposal on behalf of 21 local coalitions;
- Statewide training and information sharing;
- Coordination with IRS/SPEC; and
- Listserv for sharing national and state information from Casey Fdn, NCTC, etc.

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## LINKING TAX CAMPAIGNS TO ASSET-BUILDING

- Put together a handbook on best practices;
- Capacity-building small grants program;
- Sharing information from the field; and
- Sponsor a statewide conference every other year on financial education and asset building that has 300 participants.

## WORKING TO TIE VITA AND TBB TOGETHER

- Just over 100 Benefit Bank sites in NC;
- Helping TBB sites to become VITA sites;
- Helping VITA and TBB sites to link to asset building activities for a broad range of clients; and
- Connecting our community colleges work to VITA and TBB.

# WHAT IS THE BENEFIT BANK?

- Internet-based, counselor-assisted or self-serve program;
- Simplifies and centralizes the process of applying for public benefits and tax credits;
- Free-to-use, no fees or charges;
- Completely confidential; and
- Connects communities to resources.

# THE BENEFIT BANK NETWORK REACHES PEOPLE WHERE THEY LIVE, WORK, PLAY & PRAY

- Faith congregations
  - Health & social service organizations
  - Food and nutrition organizations
  - Community-based organizations
  - Job-training programs
  - Home ownership programs
  - Asset building programs
  - Prisoner reentry programs
  - Education organizations
  - Advocacy group offices
  - Child and Family CBOs
- United Ways  
CDCs  
Homeless shelters  
Employers  
Public agencies

## FOUR CHALLENGES

- Giving TA to a large number of diverse programs with varied needs, geographically dispersed;
- Consistent data collection when sites have a broad range of sponsoring organizations;
- Doing a media campaign across multiple media markets with little \$; and
- Balancing priorities between site TA, statewide partnerships, learning about best practices, and outreach to taxpayers.

## THREE OPPORTUNITIES

- Realize the potential for tax sites to be a doorway to a better financial future for low-wealth families, especially with refund splitting;
- Make some strategic investments for pilots to create an asset-building infrastructure that low-wealth families can access year-round; and
- Continue to work on improving the federal and state policy environment for free tax prep and asset building.

## FOUR PIECES OF ADVICE

- Direct, concrete help to sites is crucial;
- Put a system in place for tax campaigns to help set the agenda for the coalition;
- A good relationship with our IRS SPEC offices has been invaluable in terms of delivering a coordinated set of services; and
- Bring in statewide partners who serve new clients: persons with disabilities, new immigrants, newly unemployed, tribal organizations.

# ABOUT EITC CAROLINAS

EITC Carolinas is an initiative of MDC, Inc., which works to build opportunity and expand equity throughout the South. We wish to thank the Annie E. Casey Foundation, the Mary Reynolds Babcock Foundation, the Z. Smith Reynolds Foundation, and the NC Council on Developmental Disabilities for their generous support.

To contact us:

Lucy Gorham, *Senior Program Director*

Tiki Windley, *Program Manager*

MDC

400 Silver Cedar Court, Suite 300

PO Box 17268

Chapel Hill, NC 27516-7268

Direct Line: (919) 969-2682 (*Lucy*) or 969-8583 (*Tiki*)

MDC general number: (919) 968-4531

Fax: (919) 929-8557

Website: <http://www.mdcinc.org>