

The logo for the Assets & Opportunity Network features the text "ASSETS & OPPORTUNITY NETWORK" in a blue, sans-serif font. The word "NETWORK" is significantly larger and more prominent. The text is overlaid on a graphic of a network with several nodes of varying sizes (blue, grey, and brown) connected by thin lines. The background of the top section is a light blue gradient with faint icons of people and a network structure.

ASSETS & OPPORTUNITY
NETWORK

Understanding EITC Outreach

+ Tools and Tips for Using Traditional and New Media

January 8, 2015

3-4pm ET, 2-3pm CT, 1-2pm MT, 12-1pm PT

ASSETSANDOPPORTUNITY.ORG/NETWORK

Welcome



Fran Rosebush

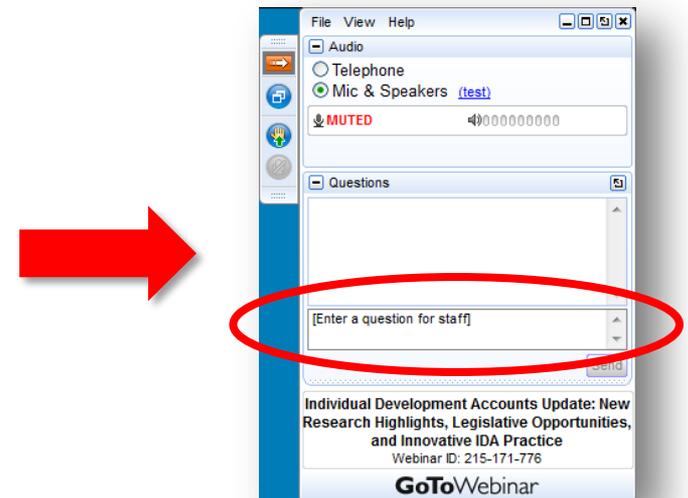
Program Manager, Assets & Opportunity Network
CFED

Housekeeping

- This webinar is being recorded and will be available online within one week.
- All webinar attendees are muted to ensure sound quality.
- **Ask a question** any time by typing the question into the text box of the GoToWebinar Control Panel.
- If you experience any technical issues, email gotomeeting@cfed.org.

Trouble dialing in?

Just listen through your computer with speakers or headphones!



Today's Speakers



Roxy Caines

Earned Income Credit Campaign Director,
Center on Budget and Policy Priorities



Joseph Leitmann-Santa Cruz

Director of External Relations,
Capital Area Asset Builders (CAAB)

Tax Credits Overview



What are the Earned Income Credit (EIC) and the Child Tax Credit (CTC)?

- ❑ Federal tax benefits for lower- and moderate-income working families and individuals

Purpose:

- Offset income and payroll taxes
- Supplement wages
- Provide a work incentive

Key Features:

- Reduces taxes workers may owe
- Even if workers don't owe taxes, they may be eligible
- Some families can claim both credits



How Much Can Workers Earn and Still Qualify for the EIC?

For Tax Year 2014:

Number of children:	Single workers with income less than:	Married workers with income less than:	EIC up to:
3 or more children	\$46,997	\$52,427	\$6,143
2 children	\$43,756	\$49,186	\$5,460
1 child	\$38,511	\$43,941	\$3,305
No children	\$14,590	\$20,020	\$496

- Workers not raising children must be between the ages of 25 and 64.
- Investment income cannot exceed \$3,350.



How Much Can Workers Earn and Qualify for the CTC?

Workers who earned *more than* \$3,000 in 2014 can get a CTC refund.

Income less than:	Filing status:
\$110,000	Married
\$75,000	Single or Head of Household
\$55,000	Married filing separately

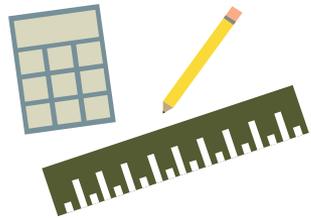
The CTC is worth *up to* \$1,000 for each qualifying child.



How do Workers Use the Credits?



Groceries



School Supplies



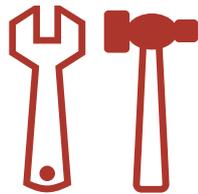
Clothing



Medical Expenses



Savings Account



Home Repairs



Transportation



Rent or Mortgage

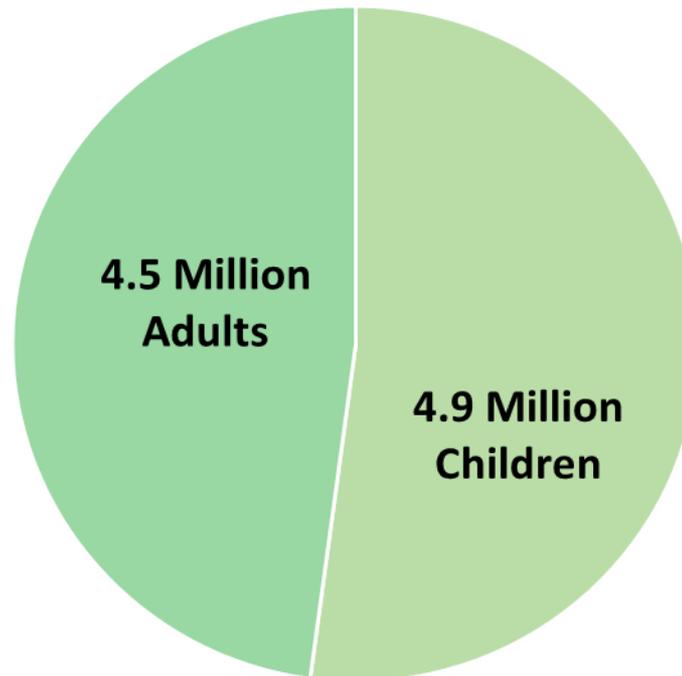
The credits help workers keep working and care for themselves and their children.



Did You Know...?

The EIC & CTC Lift More than 9 Million Above the Poverty Line

2013



Why is Outreach Needed?

EIC Eligible Workers



75 – 80% Claim EIC

20 - 25% Do Not
Claim EIC

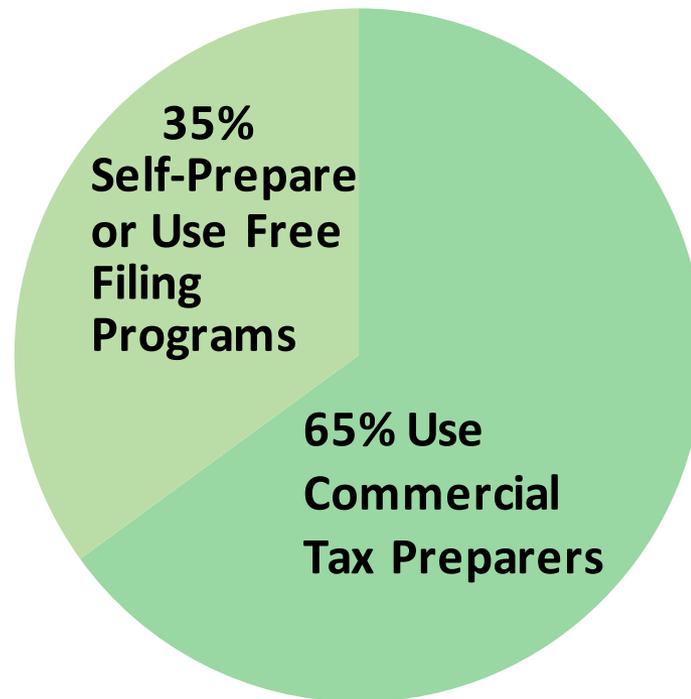


Claiming the Credits



The High Cost of Commercial Tax Preparation

- ❑ When it's time to file a tax return, many workers seek help from a commercial tax preparer.



EIC Claimants

- Average fees range from \$85 - \$120 for e-filing.



Free Tax Filing Assistance

- ❑ Free tax filing help for lower-income workers at community sites.

IRS Toll-free Locator: 1-800-906-9887

- VITA & Tax Counseling for the Elderly (TCE) sites are listed at <http://irs.treasury.gov/freetaxprep>
- TCE sites (often coordinated through the AARP Tax-Aide Program) can also be found at www.aarp.org/money/taxaide
- www.MyFreetaxes.com also provides free federal and state tax return filing



Lessons from Using Traditional & New Media for EITC Outreach

Joseph Leitmann-Santa Cruz
Director of External Relations
Capital Area Asset Builders (CAAB)

January 8, 2015

@JosephLeitmann

@CAAB_GreaterDC

www.caab.org

Agenda

- Engagement with Traditional Media
 - Research
 - Relationship Building
 - Providing Content
- Using New Media
 - Selecting Platforms
 - Identifying Audiences
 - Managing Ongoing Engagement
- Q&A

Engaging with Traditional Media

TV

- Research
 - Who are the Players?
 - Which TV Stations Have Shows on Local Issues?
 - Who are the Executive Producers?
 - Which Topics are Usually Covered?
- Relationship Building
 - In Person
 - Online: LinkedIn, Twitter and Facebook
 - Your Organization's Newsletter
- Offering Content & Speakers: Reports, Opinion, PSAs

TV (Cont'd)

- Case Study: *Vocal Point* on WHUT (March 2014)
 - WHUT: Local PBS Affiliate in DC
 - *Vocal Point*: 1-Hour Monthly Show on Regional Issues
 - Topics: Asset Building, EITC and Personal Finances



TV (Cont'd)

- Case Study: *Hispanic Agenda* and *Agenda* (Jan 2015)
 - *Hispanic Agenda* in English on NewsChannel 8
 - *Agenda* in Spanish on Telemundo-Washington
 - 7-Minute Segments
 - Topics: Tax Education, EITC and Money Management



TV (Cont'd)

- Case Study: *Comcast Newsmakers* (Jan 2015)
 - Online, On-Demand, Full Rights to Video
 - 5-Minute Segment
 - Topics: Tax Education and EITC



Radio

- Research
 - Who are the Players: Stations, Organizations, Funders
 - Which Radio Stations Have Shows on Local Issues?
 - Who are the Executive Producers?
 - Which Topics are Usually Covered?
- Relationship Building
 - In Person
 - Online: LinkedIn, Twitter and Facebook
 - Your Organization's Newsletter
- Offering Content & Speakers: Reports, Opinion, PSAs

Radio (Cont'd)

- Case Study: *Cross Roads* on WPFW 89.3 FM
- 1-Hour Show on Issues re Returning Citizens in DC
- Topics: Tax Education, EITC and VITA Sites



Radio (Cont'd)

- Case Study: Partnership with LEDC on WACA 1540 AM
- 30-Minute Weekly Show for Greater DC Area
- Topics: Tax Education, EITC and VITA Sites



CAPITAL AREA ASSET BUILDERS CAAB @CAAB_GreaterDC · Mar 24
Joining @ledcmetro's Homeownership team to discuss #Saving #EITC @DCEITC for radio show on WACA 1540 AM. pic.twitter.com/vzR4yoBdJu

Radio (Cont'd)

- Case Study: *Tu Familia Zol* on WZLZ 107.9 FM
- 1-Hour Weekly Show in Spanish for Greater DC Area
- Topics: Tax Education, EITC and VITA Sites



Maria Esther Caceres: Host of Tu Familia Zol

Using New Media

Your Organization's Website

- Very Powerful Tool for Multiple Audiences
- Constant Updates & Engagement



CAAB Invites You to Invest in Yourself: Attend our One Day Money Management 101 Workshop
December 17, 2014

On February 21, 2015, CAAB will offer a one-day financial education workshop which will give you an in-depth look into how to manage your



Call for Volunteers for the DC EITC Campaign for Tax Preparation in 2015
December 17, 2014

Community Tax Aid, which co-manages with CAAB the DC EITC Campaign, is looking for community members committed to providing high quality free tax preparation assistance and promoting financial



Same-Sex Marriages Qualify for Federal Earned Income Tax Credit (EITC)
December 16, 2014

The U.S. Department of the Treasury and the Internal Revenue Service recently ruled that same-sex couples, legally married in jurisdictions that recognize their



Information on CAAB's Financial Coaching Services
December 16, 2014

Capital Area Asset Builders (CAAB) offers financial coaching to assist participants analyze their current financial situation, set financial goals and make concrete strides toward realizing those goals.



CAAB on Comcast Newsmakers to Discuss the DC EITC Campaign
December 16, 2014

CAAB's Director of External Relations, Joseph Leitmann-Santa



CAAB Announces New Money Management 101 Financial Education Classes for January 2015
December 15, 2014

CAAB's Money Management 101 is a



Information on the Premium Tax Credit
December 15, 2014

Starting in 2014, if you get your health insurance coverage through the Health Insurance Marketplace, you may be eligible for the premium

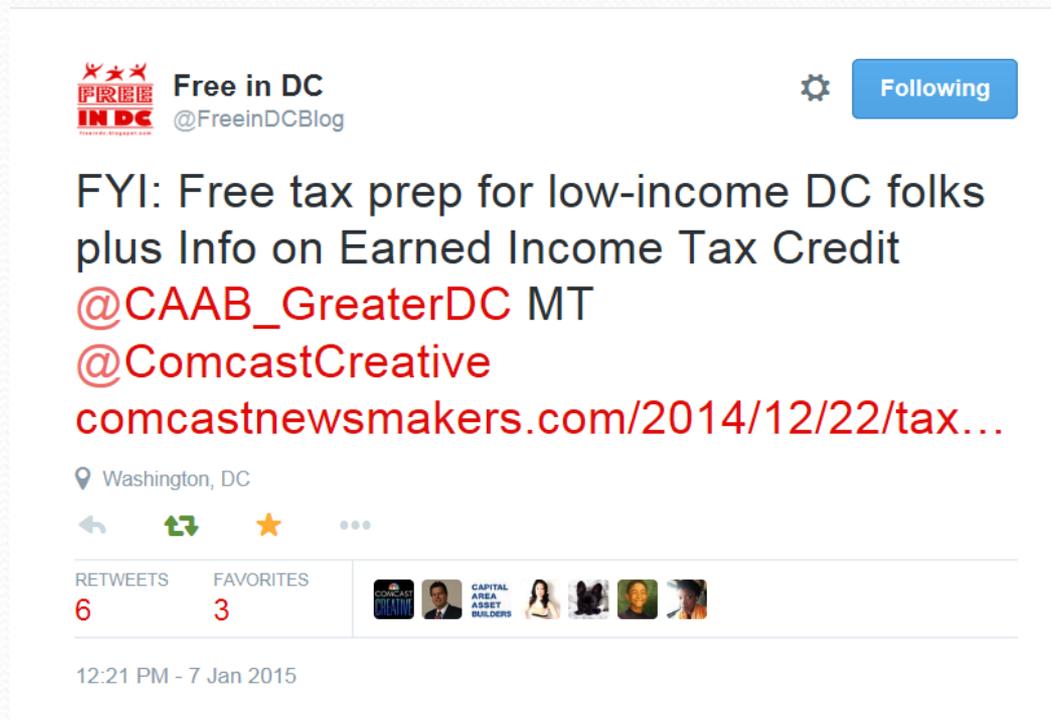
Solo 401(k)

Self Employed Entrepreneurs and Individual 401(k)s
December 12, 2014

Solopreneurs may have plans to grow their business and hire

Bloggers

- Identify Bloggers w/focus on Local Socio-Econ Issues
- Engage with Them



The screenshot shows a tweet from the account 'Free in DC' (@FreeinDCBlog). The profile picture features three stars above the text 'FREE IN DC'. The tweet text reads: 'FYI: Free tax prep for low-income DC folks plus Info on Earned Income Tax Credit @CAAB_GreaterDC MT @ComcastCreative comcastnewsmakers.com/2014/12/22/tax...'. The location is listed as 'Washington, DC'. Below the text are icons for reply, retweet, favorite, and a menu. The engagement section shows 6 retweets and 3 favorites, with a row of profile pictures of users who interacted. The tweet is dated '12:21 PM - 7 Jan 2015'.

 **Free in DC**  **Following**
@FreeinDCBlog

FYI: Free tax prep for low-income DC folks
plus Info on Earned Income Tax Credit
[@CAAB_GreaterDC](#) MT
[@ComcastCreative](#)
comcastnewsmakers.com/2014/12/22/tax...

📍 Washington, DC

👤 ↻ ⭐ ⋮

RETWEETS 6 FAVORITES 3



12:21 PM - 7 Jan 2015

Bloggers (Cont'd)

- Inform on Volunteering Opportunities
- Sell the Concept of Benefits to Society and not Organization's Services



Susie Cambria @susiecambria · Dec 18

Susie's blog, post 1: Volunteers needed to prepare taxes for low-income folks

ow.ly/G7fUs @CAAB_GreaterDC



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Twitter

- Target Audiences: End Users, Partners & Media
- Topics: Tax & EITC Education, Site Info, Volunteers
- Engagement Frequency: Daily

The screenshot displays four tweets in a vertical list. The first tweet is a retweet from Comcast Creative (@ComcastCreative) about tax credit information. The second tweet is from CAAB (@CAAB_GreaterDC) about an EITC outreach webinar. The third tweet is also from CAAB (@CAAB_GreaterDC) as a direct message to @jerrylwei. The fourth tweet is a retweet from CFED (@cfed) about a blog post. Each tweet includes a profile picture, name, handle, timestamp, text, and engagement icons (reply, retweet, like, and more).

CAAB retweeted
Comcast Creative @ComcastCreative · 23h
Info on the Earned Income Tax Credit and free tax preparation offered to the community by @CAAB_GreaterDC
comcastnewsmakers.com/2014/12/22/tax...
1 retweet 1 like

CAAB @CAAB_GreaterDC · Jan 7
CAAB & @CenteronBudget 2 Discuss #EITC Outreach:bit.ly/1yA00Xg 4 @AandONetwork-hosted webinar @cfed @DCEITC @BankonDC @Maryland_CASH
2 retweets 1 like

CAAB @CAAB_GreaterDC · Jan 7
.@jerrylwei Hi, Jerry. Happy New Year! Will you be volunteering with @DCEITC this year? We hope so!
4 retweets 1 like

CAAB retweeted
CFED @cfed · Jan 6
Don't miss what made 2014 great! Check out our latest blog post:
ow.ly/GTT8H

Facebook

- Target Audiences: End Users and Partners
- Topics: Tax Education and VITA Site Locations
- Engagement Frequency: Daily

DC Earned Income Tax Credit (EITC) Campaign
Non-Profit Organization

Timeline About Photos Likes More ▾

327 likes

Sybongile Cook likes this.

Reach a new milestone
500 Likes
Promote Page

Invite your friends to like DC Earned Income Tax Crec

Andrea Acosta Invite

Status Photo / Video Offer, Event +

What have you been up to?

DC Earned Income Tax Credit (EITC) Campaign shared a link
Posted by Teresa Hinze [?] · January 6

Contact: IRS Impersonation Scam Reporting - U.S. Treasury Inspector...
www.treasury.gov

TIGTA: promoting integrity in the administration of internal revenue laws. The United States Treasury Inspector General for Tax Administration...

19 people reached Boost Post

Like · Comment · Share

0 Notifications
0 Messages

Recent
2014
2013
2012
2011
2010
2009
Founded

See Your Ad Here

eitc
earned income tax credit
EITC and other Public Ben...
caab.org
EITC and other Public
Benefits: http://bit.ly/1zCASAy
Boost Post

LinkedIn

- Target Audiences: Volunteers, Partners, Funders & Media
- Topics: Org News, Volunteering Opps & Milestones
- Engagement Frequency: At least Weekly

Capital Area Asset Builders Las Tarjetas de Regalo y Gastos de Navidad:
<http://bit.ly/1C8TMj8>



Las Tarjetas de Regalo y Gastos de Navidad

[bit.ly](http://bit.ly/1C8TMj8) • ¿Impersonales? Sí. ¿Prácticas? También. Así son las tarjetas regalo que salvan más de un quebradero de cabeza a quienes tienen largas listas de compras o personas con las que es difícil acertar. Realmente son uno de los regalos más populares de...

Capital Area Asset Builders Washington Area Women's Foundation and CAAB Partner to Financially Empower Women: <http://bit.ly/1z902sS>



Washington Area Women's Foundation and CAAB Partner to Financially Empower Women

[bit.ly](http://bit.ly/1z902sS) • Capital Area Asset Builders (CAAB) is proud to announce it has received a grant from the Washington Area Women's Foundation to provide asset building services to women in the Greater DC Area. "When we change the life of one woman or girl, we...

Online Radio & TV Platforms

- Online Radio & TV Platforms Continue to Grow
- Don't Leave Anything on the Table

Free Tax Preparation Services Starting in February 2014

Donate >

Volunteer >

CAAB participated in the "Money Matters" radio show hosted by Bank on DC to inform the community about the DC EITC Campaign

Thanks to the invitation from Bank on DC, CAAB's Joseph Leitmann-Santa Cruz participated yesterday on the "Money Matters" radio show on Go-Go Radio to inform the community about the upcoming tax preparation and filing season, the DC EITC Campaign, and CAAB's Financial Education and Matched Savings Programs.

The DC EITC Campaign is managed by three non-profit organizations based in Washington, DC: Community Tax Aid (CTA), Capital Area Asset Builders (CAAB) and Central American Resources Center (CARECEN). For further information on the DC EITC Campaign, please visit www.dceitc.org



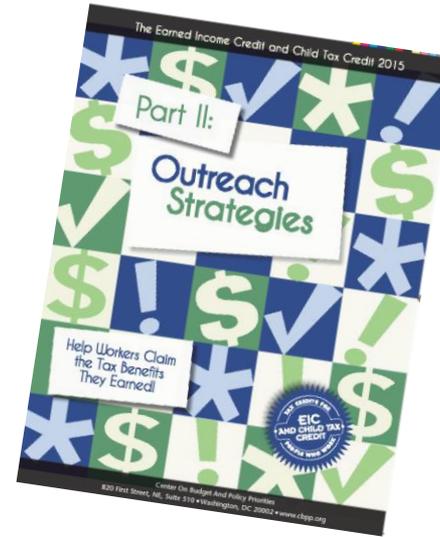
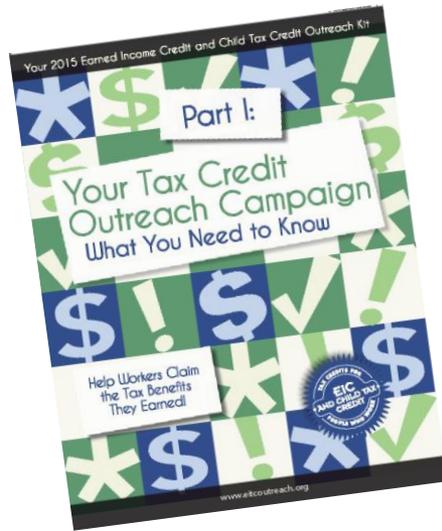
Left to Right: Abel Nuñez, Teresa Hinze, Sybongile Cook and Joseph Leitmann-Santa Cruz

Thank You!

Tax Credit Outreach Resources & Messaging



Tax Credit Outreach Kit



- ❑ Fact Sheets
- ❑ Outreach Materials
- ❑ Outreach Strategies
- ❑ Examples of Outreach in Action

Receive a FREE copy of the 2015 Tax Credit Outreach Kit:

www.eitcoutreach.org/eitc-outreach-mailing-list



Online Resources

www.eitcoutreach.org

search here

TAX CREDITS FOR EIC AND CHILD TAX CREDIT PEOPLE WHO WORK

It's Your Money. Now Claim It!

National Earned Income Tax Credit Outreach Campaign

Free tax preparation
Call 2-1-1 or 304.781.1033

It's your money. Come get it!

Walmart Save money. Live better. FINANCIAL STABILITY UNITED WAY

- The EIC & CTC lift more than 9 million adults and children above the poverty line. [Learn more](#)
- Free tax filing assistance helps over 3 million workers each year. [Learn more](#)
- Conduct outreach and help eligible workers receive the tax credits they've earned. [Learn more](#)

\$%
Tax Credit Information
What do you need to know about tax credits?

📢
Outreach Tools
Conducting outreach activities? Use these materials and resources.

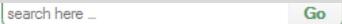
🗨️
Outreach Strategies
Need tips for starting or growing your efforts and partnerships?

?
FAQ & Fact Sheets
Looking for answers? Find them here.

- Outreach tools
- FAQs
- Fact sheets
- Infographics
- Outreach database
- Video library
- Other tax benefits
- Asset development
- ACA and tax credit outreach



For Beginners



It's Your Money. Now Claim It!

National Earned Income Tax Credit Outreach Campaign

Tax Credit Information

Basics/Getting Started EIC & CTC Other Tax Benefits Free Tax Preparation Asset Development

Basics/Getting Started

- Making Sense of Tax Credits: What are the EIC and the CTC? What is VITA?
- The Earned Income Credit: A Powerful Benefit for People Who Work
- The Child Tax Credit: An Extra Tax Break for Working Families!
- Comparing the Eligibility Requirements for the EIC and the CTC
- When do you Conduct a Tax Credit Outreach Campaign?
- EIC & CTC Benefits at Various Income Levels
- What is Earned Income for the Earned Income Credit and Child Tax Credit?
- Free Tax Filing Assistance Through VITA



Messaging Resources



search here

It's Your Money. Now Claim It!

National Earned Income Tax Credit Outreach Campaign

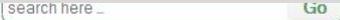
Outreach Tools

- The EIC Estimator
- Materials
- Resources**
- IRS Tax Forms & Links
- Useful Links

- Up-to-Date Tax Credit Eligibility Information for Tax Year 2014
- Tax Credit Outreach 101 – the Basics
- Guide to Using the Brookings EITC Interactive Website
- Outreach Strategies Database
- Outreach Video Library
- Tax Credit Outreach & the Affordable Care Act
- Outreach Infographics
- Outreach Works! Have You Heard?—Innovative Case Studies
- EIC & CTC Benefits at Various Income Levels
- EIC Participation by State
- IRS Territory Manager List
- Generating Media Coverage



Tax Credit News



search here _ [Go](#)



It's Your Money. Now Claim It!

National Earned Income Tax Credit Outreach Campaign

[Home](#) > [Outreach Tools](#) > [Useful Links](#) > [In the News](#)

In the News

This section features a weekly round-up of news stories, articles, blogs, publications, and events about the EIC, CTC, free tax preparation and asset development. You will also find a showcase of the work of local tax credit outreach campaigns across the country.

Campaign Partner Spotlight	Events
Blog Posts	Reports & Publications
Articles & Opinions	Of Interest

Useful Links

- [Additional Toolkits and Materials](#)
- [National Coalitions](#)
- [Reports and Links](#)
- [In the News](#)
- [Partner Websites](#)



13 Ways to Use National Tax Credit Outreach Campaign Materials

1. Trainings
2. Presentations
3. Marketing
4. Advocacy
5. Talking points
6. Press conferences
7. Generate media attention
8. Fundraising
9. Seasonal planning
10. Coalition-building
11. Developing and nurturing partnerships
12. Blog posts and newsletters
13. Social media



The Center on Budget and Policy Priorities' **National Tax Credit Outreach Campaign Can:**

- ❑ Provide Tax Credit Outreach Kits
- ❑ Deliver technical assistance to help develop an outreach strategy
- ❑ Conduct trainings
- ❑ Connect to other community groups and resources



Quick Links for Resources on www.eitcoutreach.org

- ❑ [Outreach Materials](#)
- ❑ [ACA Outreach Resources](#)
- ❑ [EIC & CTC FAQs](#)
- ❑ [Searchable Outreach Strategies Database](#)
- ❑ [Tax Credit Outreach Video Library](#)
- ❑ [Tax Credit Outreach Infographics](#)
- ❑ [In the News](#)
- ❑ [Guide to the Brookings Institution's EITC Interactive Website](#)
- ❑ [Tax Credit Outreach 101 – the Basics](#)
- ❑ [Request a printed copy of the Tax Credit Outreach Kit](#)

For questions or assistance with other resources, contact eickit@cbpp.org or 202-408-1080.



Questions & Answers



Next Steps



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ASSETS & OPPORTUNITY
NETWORK

Thank You!

ASSETSANDOPPORTUNITY.ORG/NETWORK