

# TAX CREDITS OUTREACH MADE EASY: TIPS AND TOOLS FOR ADVOCATES

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December 10, 2015



# POLLING QUESTION

# FEDERAL TAX CREDITS CAN HELP PUT MONEY BACK IN FAMILIES' POCKETS.

- The federal Earned Income Tax Credit can be worth up to \$6,242 in 2015.
- The federal Child Tax Credit can be worth up to \$1,000 per child – and for 2015, is refundable for very low-income families.
- The federal Child and Dependent Care Tax Credit can be worth up to \$2,100.
- The federal Premium Tax Credit can help individuals pay for health insurance in the new health insurance marketplace.

# AND MANY STATES ALSO OFFER TAX BENEFITS TO FAMILIES:

## ■ In 2015:

- 25 states and the District of Columbia offer EITCs;
- 26 states offer child care tax credits;
- 3 states offer Child Tax Credits.

# **BUT FAMILIES NEED TO FILE THEIR TAXES AND CLAIM THESE CREDITS TO GET THE BENEFITS!**

- **An estimated 20-25% of eligible individuals and families fail to claim the EITC each year, meaning that billions of dollars in tax credits go unclaimed.**
- **Make sure the families in your area aren't among them!**

**YOU CAN HELP FAMILIES  
LEARN ABOUT VALUABLE  
FEDERAL AND STATE  
TAX CREDITS**

**Earned Income  
Tax Credit**

**Child Tax Credit**

**Child Care Tax  
Credit**

**Premium Tax  
Credit**

# YOU CAN TAKE FIVE EASY STEPS TO HELP INFORM FAMILIES ABOUT TAX CREDITS.

- Get the facts about tax credits.
- Get the facts about free tax preparation services.
- Partner up to expand your reach.
- Spread the word to families with children.
- Gather success stories.

# GET THE FACTS – ABOUT TAX CREDITS.

- Free materials on tax credits are available.
  - Visit [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes) to download free state-specific fliers and other materials, including updated FAQs on the Premium Tax Credit.
  - Visit [www.eitcoutreach.org](http://www.eitcoutreach.org) for information and materials on the federal EITC, the Child Tax Credit, and the Premium Tax Credit.
  - The IRS has a special webpage focusing on the EITC. Visit [www.eitc.irs.gov](http://www.eitc.irs.gov).



# GET THE FACTS – ABOUT FREE TAX PREPARATION ASSISTANCE.

- The IRS-sponsored VITA Program offers free tax help to low- to moderate-income (generally, \$50,000 and below) people who cannot prepare their own tax returns.
- The IRS also coordinates with AARP to offer tax help to people of low-to-middle income, with special attention to those age 60 and older, through a program called Tax-Aide.

# POLLING QUESTION

# VOLUNTEER VS. PAID TAX PREP

- Volunteer tax preparers are trained and certified by the IRS and have IRS support.
- If you have questions or follow-up, organizations that do free tax prep don't pack up after April.
- Volunteer tax preparers can help prepare or amend tax returns from prior years.
- Free tax preparers don't charge exorbitant and unnecessary fees through Refund Anticipation Loans (RALs) and Refund Anticipation Checks (RACs).
- Sometimes free tax preparers can connect families with other services or resources.

# TO GET INFORMATION ABOUT FREE TAX PREPARATION SERVICES. . .

- Starting in January, call the IRS' free hotline at 1-800-906-9887 to locate a VITA site near you. You can also visit <http://irs.treasury.gov/freetaxprep/>.
- Starting in January, call 1-888-227-7669 or visit [www.aarp.org/money/taxaide/](http://www.aarp.org/money/taxaide/) to locate an AARP-sponsored Tax-Aide site near you.

# PARTNER UP TO EXPAND YOUR REACH.

- **Work with:**
  - **Other advocacy or service organizations in your community, including local healthcare navigators and organizations involved in healthcare outreach**
  - **Local businesses**
  - **State and local government agencies and officials**
  - **EITC coalitions**

# TAX CREDIT COALITIONS

- **Conduct tax credit outreach campaigns**
- **Organize free tax assistance services**
- **Link to financial services and asset-building programs**
- **Help assess eligibility for other public benefits**

# COALITIONS ARE “GRASSROOTS”

- **Organized by local community groups serving lower-income families.**
- **They are not government programs.**
- **Often include the mayor, or other public official, and local business leaders.**

# WHAT COALITIONS DO

- **Develop strategy, themes, and materials for tax season outreach campaigns**
- **Find partners to host Volunteer Income Tax Assistance (VITA) sites**
- **Recruit VITA volunteers**
- **Organize training for volunteers**
- **Get campaign information out to workers!**



# THE VALUE OF MORE PARTNERS

- **Outreach coalitions divide campaign tasks; take advantage of partners' special capabilities and avoids duplication**
- **Some partners are experienced reaching certain parts of the community**
  - **Ex. – ethnic communities and businesses, family day care providers, or people with disabilities**

# COALITIONS PARTNER WITH THE IRS

- **IRS staff:**
  - **Don't run VITA sites**
  - **Helps sites get started, ensure quality of preparation**
  - **Connects VITA sites to IRS training materials and free tax software**
  - **Provides trouble-shooting help during the filing season**

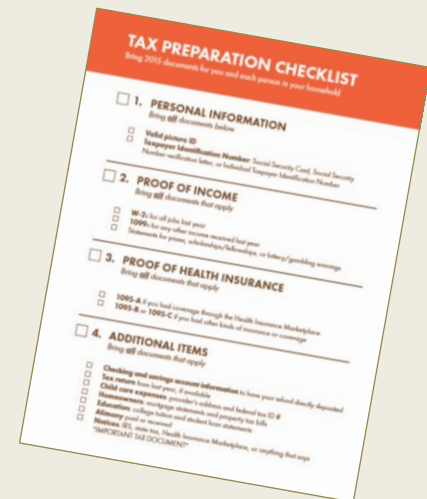
# CONNECT WITH A COALITION

Don't know if there is a coalition in your community?

- 1.** Contact the Center's *Get It Back Campaign* to find out: [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org).
- 2.** Reach out to your IRS Territory Manager.

# CULTIVATE STRONG PARTNERSHIPS

- The *Get It Back Campaign* provides many resources to support tax credits outreach partnerships



Downloadable outreach materials, virtual trainings, sample social media posts, and partner engagement tips and strategies

# JOIN THE GET IT BACK CAMPAIGN



Tax Credits  
for People  
Who Work


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

202-408-1080, [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org)

# TAX CREDITS OUTREACH MADE EASY!

- Visit [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes) to download the updated version of the National Women's Law Center's Toolkit.

## FAMILY TAX CREDITS TAX YEAR 2015



### CAMPAIGN CHECKLIST

- 1 October/November 2015**
  - Sign up to be an NWLC community partner to receive monthly information about tax credits outreach, technical assistance and tailored materials for your organization. To sign up, go here: [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes).
  - Participate in NWLC's webinars to learn more about tax credits outreach.
  - Download free NWLC materials (including state fliers) at [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes).
  - Remind families to make sure that the Health Insurance Marketplace has current information about their income and household size, and about upcoming Open Enrollment through the Health Insurance Marketplace.
- 2 December 2015**
  - Check NWLC's website for additional outreach materials at [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes).
  - Identify possible outreach partners, including state and local coalitions, community organizations, businesses, the IRS, and state, local, and county government offices.
  - Get on the agenda for coalition or community meetings to talk about tax credits.
  - Provide families with information about how to enroll in the Health Insurance Marketplace and get help paying for health care during Open Enrollment. See [www.nwlc.org/wp-content/uploads/2014/11/final\\_nwlc\\_acatoolkit2015.pdf](http://www.nwlc.org/wp-content/uploads/2014/11/final_nwlc_acatoolkit2015.pdf).
- 3 January 2016**
  - Post tax credits outreach materials on your website and encourage partners to do the same.
  - Post tax credit reminders on Facebook and Twitter.
  - Start distributing fliers to families.
  - Contact the IRS and AARP to find out where free income tax preparation services will be available in your area and to get additional materials.
  - Connect with local coalitions and the IRS around any IRS-sponsored outreach activities around EITC Awareness Day.
  - Begin airing public service announcements or submitting letters to the editor to local newspapers.
  - Make sure families know that the deadline to sign up for health insurance through the Health Insurance Marketplace is January 31, 2016.
- 4 February/March 2016**
  - Continue distributing fliers to the families in your state, and providing information, including about free tax preparation assistance, through social media.
  - Work on outreach activities with coalition partners.
  - Collect stories about parents in your community that have benefited from tax credits.
- 5 April 2016**
  - Provide last-minute reminders about tax credits on social media before April 15.
  - Collect success stories.
  - Celebrate a job well done!**

NATIONAL WOMEN'S LAW CENTER TAX CREDITS OUTREACH CAMPAIGN 2016 TAX FILING SEASON

# SPREAD THE WORD TO FAMILIES WITH CHILDREN.

- We have resources that you can use:
  - Fliers
  - Newsletter Articles
  - Websites and Social Media
  - Phone
  - Media

# SPREAD THE WORD WITH FREE FLIERS.

- You can download fliers at [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes) or [www.eitcoutreach.org/home/outreach-tools/materials](http://www.eitcoutreach.org/home/outreach-tools/materials).
- Post them in your offices.
- Email electronic copies to your networks.
- Bring some to meetings and conferences.
- If you can, make copies for your partners!

**FAMILY TAX CREDITS**  
TAX YEAR 2015

**FAMILIES**  
GET THE TAX CREDITS  
YOU DESERVE!

You work hard to support your family. Whether or not you owe any income tax, you could get thousands of dollars back in tax credits.

**You could qualify for:**

- Up to **\$2,100** from the federal **Child and Dependent Care Tax Credit**.
- Up to **\$6,242** from the federal **Earned Income Tax Credit**.
- Up to **\$1,000** per child from the federal **Child Tax Credit**.
- A **Premium Tax Credit** to help you purchase health insurance through the Health Insurance Marketplace.

- If you need help paying for health insurance in 2016, you can get the **Premium Tax Credit** as soon as you sign up through the Marketplace. Most people need to sign up by February 2016—so go to [healthcare.gov](http://healthcare.gov) or call (800) 318-2596 today for more information.
- If you purchased insurance through the Marketplace in 2015 and received an advance payment of the **Premium Tax Credit**, you must file a tax return for 2015.

**TO GET THESE CREDITS, YOU MUST FILE A TAX RETURN.**  
Find out where you can get **FREE** help with your taxes by calling the IRS toll-free at (800) 906-9887. Or go to <http://irs.treasury.gov/freetaxprep/>.

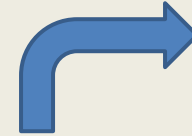
**NATIONAL WOMEN'S LAW CENTER**  
EXPANDING THE POSSIBILITIES

NATIONAL WOMEN'S LAW CENTER TAX CREDITS OUTREACH CAMPAIGN 2016 TAX FILING SEASON



# USE NEWSLETTER ARTICLES.

- Towards the end of the year, put a short article about tax credits in your newsletter – many families file their taxes in January!
- Put a reminder in your spring newsletter for families who are late filers.
- Share with your colleagues at other organizations for their newsletters, too!
- *NWLC would be happy to tailor a newsletter article for your organization. Email [ahopper@nwlc.org](mailto:ahopper@nwlc.org).*



Found in the Toolkit!

## SAMPLE NEWSLETTER ARTICLE

### Families – Get the Tax Credits You Deserve!

Did you know that many families are eligible for valuable tax credits every year? Whether or not you owe any income tax, you could get thousands of dollars in tax benefits.

**To get these credits, you must file a tax return.** Find out where you can get your taxes prepared for free by calling us (800) 908-9887 or visiting <http://irs.treasury.gov/freetaxprep>.

When you file your taxes, make sure you ask about these credits:

- The federal **Child and Dependent Care Tax Credit** is for families that pay for child care when they go to work. This credit is worth up to \$2,100.
- The federal **Child Tax Credit** (CTC) is for families raising children. This credit is worth up to \$1,000 per child, and is refundable for families earning at least \$3,000.
- The federal **Earned Income Tax Credit** (EITC) is designed to boost the wages of eligible families. This refundable credit is worth up to \$6,143 and is available to married couples earning less than \$52,427 or singles earning less than \$46,997.
- A **Premium Tax Credit** to help you purchase health insurance through the Health Insurance Marketplace. If you need help paying for health insurance in 2015, you can get the Premium Tax Credit as soon as you sign up through the Marketplace. Most people need to sign up by February 2015—so go to [healthcare.gov](http://healthcare.gov) or call (800) 318-2598 today for more information. If you purchased insurance through the Marketplace in 2014 and received an advance payment of the Premium Tax Credit, you must file a tax return for 2014.

Most states have additional tax credits for working families – be sure to ask!

**FOR MORE INFORMATION CONTACT:  
[INSERT OUTREACH PARTNER]**

# USE YOUR WEBSITE AND SOCIAL MEDIA!

- Put tax credit information on your website.
    - Link to [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes).
    - Link to the IRS' VITA site locator at <http://irs.treasury.gov/freetaxprep/> or a local VITA site.
  - Use Social Media.
    - Use Facebook to educate your fans about tax credits and point your community members to VITA sites.
    - Tweet about taxes!
      - **#taxcredits** can be worth up to thousands of dollars to families with children! [link]
      - Families – don't miss out on federal and state **#taxcredits**. [link]
- For other sample tweets, check out the Toolkit!*



Whether or not you owe any income tax, you could get thousands of dollars back in tax credits.

To get these credits, you **must** file a tax return. Find out where you can get **free** help with your taxes by calling the IRS toll-free at **(800) 906-9887**. Or go to [irs.treasury.gov/freetaxprep](http://irs.treasury.gov/freetaxprep).

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



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# BE PREPARED TO GIVE INFORMATION OUT OVER THE PHONE.

- Have your receptionist tell families who call that there is information about tax credits on your website or in your office.
- If you have a pre-recorded message, mention tax credits resources.
- If your community has a 211 or 311 service, ask if those operators can give out tax info.
- Do you need health insurance? Go to [www.healthcare.gov](http://www.healthcare.gov) or call (800) 318-2596 for more information!

# WORK WITH THE MEDIA.

- Send out a press release at the end of January.
  - Write letters to the editor.
  - Start a Public Service Announcement campaign.
- *Sample materials are available in the Toolkit and at [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes), and NWLC would be happy to tailor any materials for your organization. Email [ahoop@nwlc.org](mailto:ahoop@nwlc.org).*

## FIND OUT ABOUT TAX CREDITS BEFORE YOU FILE!

### To the Editor:

Did you know that if you are paying for child or dependent care, you may be entitled to receive extra money in your tax refund? Or pay less if you owe taxes? This is important to know as W-2s go out today and families begin preparing and filing their taxes.

There are a number of federal and state tax credits that can help families, especially low- and moderate-income families. Eligible families could claim up to thousands of dollars in tax benefits on their 2014 state and federal forms.

- The federal Child and Dependent Care tax credit provides up to \$2,100 in tax assistance to help parents pay for the child care they need to go to work.
- Families may also be eligible for up to \$6,143 from the federal Earned Income Tax Credit, which boosts the wages of low- and moderate-income families.
- To help ease the cost of raising children, up to \$1,000 per child can be claimed under the federal Child Tax Credit.
- And a Premium Tax Credit can help you purchase health insurance through the Health Insurance Marketplace. If you need help paying for health insurance in 2015, you can get the Premium Tax Credit as soon as you sign up through the Marketplace. Most people need to sign up by February 2015—so go to [healthcare.gov](http://healthcare.gov) or call (800) 318-2596 today for more information. If you purchased insurance through the Marketplace in 2014 and received an advance payment of the Premium Tax Credit, you must file a tax return for 2014.
- [Add any state credits here!]

Families must file a tax return in order to claim these credits, but it's not too late even if you've already filed. You can file amended tax returns, even going back a couple of years.

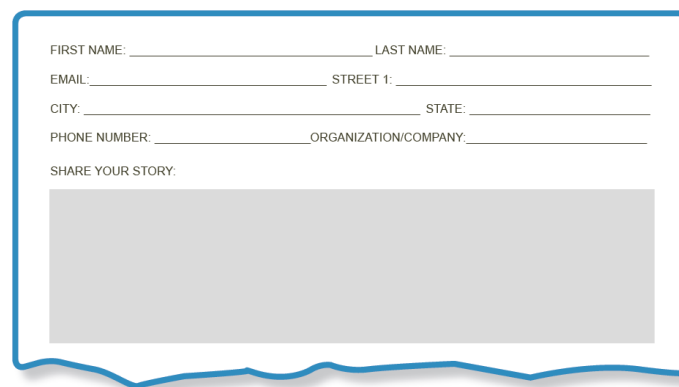
[Our organization] is working to inform all families about tax benefits that may be available to them. Learn more about the tax credits and locations for free tax preparation help at [insert contact info] or call the Internal Revenue Service directly at 800-906-9887.

# COLLECT SUCCESS STORIES!

- Keep track of clients or constituents who tell you that they claimed and benefited from tax credits. Their stories can show people and policymakers the difference tax credits can make in people's lives!

*Getting free tax preparation at a United Way VITA site made a big difference for one family in Dallas, TX. The family received a refund of several thousand dollars, which was direct-deposited in their bank account and helped pay for children's clothes, a crib, and a car.*

You can share your stories at  
[www.nwlc.org/action/share-your-story-tax-credits-outreach](http://www.nwlc.org/action/share-your-story-tax-credits-outreach).



FIRST NAME: \_\_\_\_\_ LAST NAME: \_\_\_\_\_  
EMAIL: \_\_\_\_\_ STREET 1: \_\_\_\_\_  
CITY: \_\_\_\_\_ STATE: \_\_\_\_\_  
PHONE NUMBER: \_\_\_\_\_ ORGANIZATION/COMPANY: \_\_\_\_\_  
SHARE YOUR STORY:  
\_\_\_\_\_

# BECOME AN NWLC COMMUNITY PARTNER!

- As a community partner, you will receive:
  - Customized resources that make it easy to spread the word about tax credits to families in your community;
  - Technical assistance on issues relating to tax credits and outreach activities; and
  - Acknowledgement on our website.
  - Sign up today at <http://action.nwlc.org/communitypartner>

# FOR MORE TIPS AND TOOLS ABOUT TAX CREDITS OUTREACH TECHNIQUES:

- Download NWLC's Toolkit, state fliers and other materials at [www.nwlc.org/loweryourtaxes](http://www.nwlc.org/loweryourtaxes).
- Download CBPP's Earned Income Tax Credit outreach kit at [www.eitcoutreach.org](http://www.eitcoutreach.org).
- Visit the IRS' EITC Central for more materials and resources – including YouTube videos!  
[www.eitc.irs.gov/Partner-Toolkit/basicmaterials](http://www.eitc.irs.gov/Partner-Toolkit/basicmaterials).