



Developing Partnerships to Expand Outreach Training *Reference Guide*

Presented by the Center on Budget and Policy Priorities' Get It Back Campaign

Why Partnerships?

- Partnerships are an essential component of tax credit outreach and VITA services. Three benefits:
 1. Increase reach and exposure
 - Enhance credibility – a significant part of VITA is building trust with clients
 - Provide avenues to reach new audiences through natural cross promotion
 2. Expand available resources
 - Increase range of services without additional funds
 - Fill gaps in knowledge, capacity, or skills
 3. Spark creativity and new ideas
 - Diversify perspectives and expertise that shapes programs
 - Improve ability to innovatively address challenges

Partnering with Universities

Impact America has provided opportunities for over 8,000 students in four states to participate in service projects, including VITA. AmeriCorps volunteers recruit, train, and organize hundreds of college students each year to prepare taxes in their communities. Some VITA sites are located off-campus to increase client accessibility.

- Partnership Benefits
 - Connection to a large pool of volunteers
 - Opportunity to institutionalize outreach efforts by educating students about tax credits and VITA in course classes
- Initiating University Partnerships
 - Connect with professors or the provost
 - Get in front of students
 - Work with schools to offer course credit for participation (training and volunteering) or incorporate EITC/VITA education into the curriculum
 - Emphasize the importance of free tax preparation as an opportunity to help others and give back to the community since millennials care about “doing good”
- Maintaining University Partnerships
 - Check-in throughout the year
 - Provide support: send reminders and follow-up at each step
 - Congratulate students on the work they did and the leadership they showed

Partnering with Banks

Heart of West Michigan United Way serves over 64,000 taxpayers at 15 VITA sites through the Kent County Tax Credit Coalition. The coalition works with banks to provide asset building services.

- Partnership Benefits
 - The Community Reinvestment Act (CRA), a framework for partnership
 - Under CRA, financial institutions are evaluated on their efforts to help connect underserved neighborhoods to financial services.
 - Connection to knowledgeable volunteers and possible funding
 - Collaboration on asset building events

- Initiating Bank Partnerships
 - Identify the person in charge of CRA services, like a community development manager
 - If you don't know, contact the bank's branch manager who can connect you to the CRA representative
 - Explain how tax credits and VITA benefit the community (don't focus on CRA score)
 - Emphasizes asset building instead of financial literacy (to banks and clients)
 - Take the time to get to know your contacts to find what works and what doesn't

- Maintaining Bank Partnerships
 - Invite partners to coalition meetings to get their perspective and help them feel involved
 - Show an interest in nurturing the partnership – send an email to check-in and say hello
 - Inform partners about events, reports, or volunteer needs
 - Be flexible with training and creative with solutions

Partnering with Businesses

WorkLife Partnerships helps connect low- and middle-income workers with resources to improve finances, health, childcare, and transportation. They partner with local businesses to offer convenient VITA services onsite for employees.

- Partnership Benefits
 - Connection to lower-wage workers, who otherwise wouldn't use VITA services
 - Increased visibility through HR outreach and employee word of mouth

- Initiating Business Partnerships
 - Find a champion in HR
 - File the HR director's tax returns to build trust and provide a direct source for advertising
 - Avoid using IRS/VITA lingo

- Maintaining Business Partnerships
 - Designate a main contact who will also be onsite during tax preparation
 - Offer training and education to HR champions before tax season
 - Attend partner events and connect with them on social media
 - Share aggregate data, if available

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