



# PROMOTING EITC ACCESS AND AWARENESS

## LESSONS FROM DETROIT

*This case study is part of a series examining the strategies and messages used by advocates to create, expand or protect state Earned Income Tax Credits.*

### BACKGROUND

A recent effort to expand access to the Earned Income Tax Credit (EITC) in Detroit has become a model for metropolitan areas around the country. After a 2016 study showed that 26,000 eligible Detroit households were not claiming the credit, leaving \$80 million unclaimed each year, the Detroit Mayor's Office began a targeted campaign to expand resident awareness and access to the EITC.

Led by the office of Mayor Mike Duggan, a number of non-profit partners joined the 2017 EITC Initiative to reverse the trend of unclaimed EITC refunds. Groups like the United Way for Southeastern Michigan and the Accounting Aid Society helped the Mayor's team minimize the public awareness campaign's impact on the city budget. A team from Bloomberg Associates helped to develop and implement the strategic plan, based in part on the successful EITC expansion pilot program launched in New York City by former Mayor Michael Bloomberg.

### CAMPAIGN STRUCTURE AND STRATEGY

The planning stage for the 2017 EITC Initiative was focused on three primary points of action: increasing capacity for free tax preparation services, launching an informational campaign to make Detroiters aware of the EITC through marketing and media, and recruiting volunteers to assist Detroiters in filing for EITC refunds.

The City of Detroit provided funding to support 18 temporary staff who were responsible for building capacity at Accounting Aid Society sites, where a team of volunteers helped residents file their tax returns. Their efforts were aided by the Community and Economic Development Association of Michigan, who provided a grant to the Accounting Aid Society to fund EITC awareness ads on social media. The partnership network included the United Way for Southeastern Michigan, who provided funding to support the Virtual VITA ("Drop & Go") Model and call-center operations to boost engagement with Detroit residents who qualified for the EITC.

On January 27, 2017, Mayor Mike Duggan kicked off the EITC public awareness campaign with a press conference. The campaign included billboards, brochures, ads on mass transit, earned media coverage on radio and television, newspaper interviews, radio ads, e-mail blasts and public service announcements on residents' water bills.

The Detroit Mayor's Office outlined the following steps that cities can take to implement a successful EITC public awareness campaign:

**Step 1:** *Identify the agency in your jurisdiction that is operating a Volunteer Income Tax Assistance (VITA) program.* If not readily known, reach out to your local IRS office and inquire if there is a VITA program in your local area.

**Step 2:** *Reach out to the agency.* Discuss your interest in helping more residents of your city to become more aware of the EITC and in expanding access to free tax assistance. Ask for preliminary data that shows the breakdown of total number of filings completed, number of EITC filings, and the average refund amount.

**Step 3:** *Form a working group of additional stakeholders.* Stakeholders should have an interest in or already provide some form of social, human or financial counseling services to the demographic that you are looking to reach.

**Step 4:** *Develop a strategic plan that aligns with your priority goals as a city.* Create a marketing plan, a financial plan and a timeline to support the strategic plan.

**Step 5:** *Seek financial and in-kind contributions from corporations, foundations and other supporters.*

**Step 6:** *Help engage the employee workforce as volunteers.* The Detroit public awareness campaign supported efforts by the Accounting Aid Society that trained over 500 volunteers to help residents file tax returns.

**Step 7:** *Ensure there is geographical coverage* to ensure wide accessibility of free tax assistance.

**Step 8:** *Hold a press conference at which your mayor launches the initiative.* This can be done on the day of or during the week of National EITC Awareness Day.

**Step 9:** *Start early and often with spreading the word.* Be sure to implement a social media strategy. Share all collateral materials created to promote the initiative with other stakeholders and partners so that they can share with their networks and constituencies.

**Step 10:** *Schedule follow-up interviews.* Reinforce the message of the launch through interviews with various talk radio, television and print media outlets.



**"I actually paid off a few debts to help raise my credit score so that when it is time to purchase a home, I will be able to. I also used the money for other things like my unpaid maternity leave, and that was very helpful."**

*—Detroit EITC recipient, mother of three*

## KEY MESSAGES USED

- **All eligible Detroit residents who qualify have an opportunity to get ahead financially** by claiming the EITC in 2017.
- **Each year, Detroiters leave an estimated \$80 million in unclaimed federal EITC refunds on the table.**
- **Over 18,000 more hardworking Detroiters received an average of \$4,000 in EITC refunds this year.** Eligible Detroit families deserve to claim their share.
- **City of Detroit employees should take a 24-Hour Volunteer Pledge** to help eligible Detroit families get ahead financially.'

## OUTCOMES

Upon the conclusion of the 2017 EITC Initiative, the city found that approximately 18,150 more Detroiters filed for the EITC than did in 2016 — resulting in an additional \$74 million in state and federal tax refunds to residents. Detroit residents claimed a total of \$315 million in EITC refunds, granting them greater financial security.

### FULL COALITION LIST

City of Detroit  
Accounting Aid Society  
Bloomberg Associates  
Cities for Financial Empowerment  
Community and Economic Development  
Association of Michigan  
United Way for Southeastern Michigan  
OutFront Media, Inc.  
Wayne Metro Community Action Agency  
Abayomi Community Development  
Corporation  
Focus: Hope  
Goodwill Industries  
Jewish Vocational Service  
Matrix Human Services  
Operation Hope  
Service, Employment and Redevelopment  
Metro-Detroit  
Southwest Economic Solutions  
United Streets Networking and Planning:  
Building a Community

*Tax Credits for Workers and Their Families (TCWF) is a strategic communications campaign working to promote the Earned Income Tax Credit, Child Tax Credit and other tax credits at the state and federal level. We offer communications support to advocates and policymakers working to enact new tax credits or improve existing ones. Our website ([www.taxcreditsforworkersandfamilies.org](http://www.taxcreditsforworkersandfamilies.org)) provides information, resources and tools to help community-based organizations and elected officials raise awareness about these important tax credits and help working families get ahead.*

*TCWF is a non-partisan initiative led by The Hatcher Group, a communications and public affairs firm dedicated to inspiring social change for good. For more information, contact Lauren Pescatore at (301) 656-0348 or [lpescatore@thehatchergroup.com](mailto:lpescatore@thehatchergroup.com).*