

A 2020 GUIDE TO **Effective EITC Advocacy**

Each year, advocates across the country fight hard to protect and advance state-level Earned Income Tax Credits (EITCs). To help share the lessons learned from these campaigns, Tax Credits for Workers and Their Families (TCWF) annually compiles a set of case studies on several noteworthy efforts.

This resource guide highlights the key takeaways from this year's set of case studies focusing on EITC expansion campaigns in California and Colorado, as well as a guide to messaging about the EITC during the COVID-19 pandemic. These case studies also include lessons from the other 19 campaigns TCWF studied closely over the past decade and cover a wide range of EITC campaign challenges and strategies. Some approaches are common to general advocacy work, while others are more specific to the unique circumstances surrounding the enactment of tax credit legislation. The elements highlighted below are only examples—advocates should read the full case studies to learn the details about how each campaign was implemented.

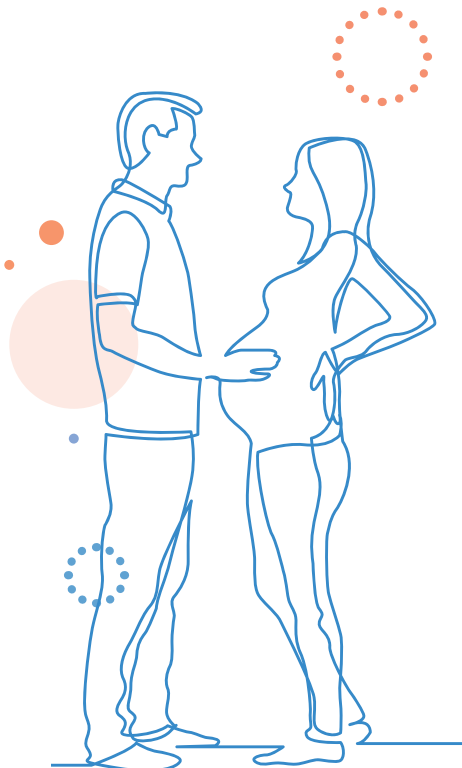


Elements common to many advocacy campaigns include:

- **A well-thought-out strategy that clearly identifies key advocacy targets.** This should be developed at the beginning of the campaign and aimed squarely at policymakers, community leaders, and other decision-makers who can help push your effort over the finish line.
- **Effective timing and adaptable strategies.** Look for windows of opportunity to launch an all-out push for your campaign. And be prepared to quickly shift priorities, tactics, and messaging as the political landscape changes or new opportunities arise. After Colorado's original EITC campaign stalled due to the pandemic, new tax legislation offered an opportunity to push an expansion forward. Advocates' ability to quickly pivot allowed them to take advantage of a short window of opportunity.
- **A diverse and thoughtful coalition.** Leverage unique and unlikely partner organizations to reach new audiences. California's coalition included immigrant rights groups and health advocates to make the connection between the EITC expansion and a wide variety of issues facing California's workers.
- **A clear set of messages used by all coalition partners.** A small group of coalition members should draft clear and compelling talking points to ensure every partner organization is speaking with the same voice. Be sure to monitor messages over the course of the campaign to determine if they are working or if they need refinement.
- **Effective outreach to community members.** Connecting with those directly impacted by the EITC is vital for informing policy and bolstering advocacy. In Colorado, advocates partnered with local grassroots organizations to connect with EITC claimants and share their stories of how the credit impacted their lives.

Elements unique to EITC campaigns include:

- **Educating policymakers about tax credits.**
Working family tax credits are not widely known or understood, even by many lawmakers. Educating them on a regular basis about what the EITC does is an important component of any advocacy effort, especially after election years as new potential champions enter the legislature.
- **Drawing on proven messages used in other states.**
Every state has unique circumstances that will influence which messages will be most successful. The following messages have proven effective in the states TCWF studied:
 - The EITC's role in keeping people out of poverty.
 - The EITC's effectiveness at boosting outcomes in other critical areas, such as health, racial equity, and education.
 - The EITC's role in maintaining a fair tax system, emphasizing that the credit reduces the tax burden for lower-income workers, and as such, any cut to the EITC would mean a tax increase on this population.
 - The EITC's effectiveness in boosting state economies.



- **Identifying a clear funding source.** Enacting or enhancing a state-level EITC is rarely successful if lawmakers believe the state “cannot afford it.” This is particularly critical during the COVID-19 economic recession as states struggle with tight budget constraints. Lay out a clear strategy for covering the cost of the credit before beginning your campaign. This was successful in Colorado where the expansion was considered revenue neutral due to revenue from a broader tax reform package.
- **Using data to quantify how many people will benefit (or be harmed) by a decision affecting the EITC.** Most campaigns use federal IRS and Census data, as well as Institute for Taxation and Economic Policy (ITEP) analysis, to show legislators how many constituents in their districts would benefit (or be harmed) by their decisions. California and Colorado advocates developed district-level fact sheets that showed lawmakers how many people in their congressional district would benefit from the EITC expansion.
- **Pay attention to advocacy campaigns in other states.** Learning from the successes and challenges of new EITC expansion campaigns in other states, such as expanding to ITIN filers and young workers, can help you craft messaging and create a similar campaign in your state.
- **Storytelling.** Sharing the stories of those who claim the EITC helps humanize the issue and show lawmakers how their decisions impact their constituents. Storytelling can happen through in-person testimony, video testimony, meetings, and legislator visits to VITA sites, or through videos, blogs and other materials.
- **National partners.** Advocates in most states worked closely with national partners including ITEP, the Center on Budget and Policy Priorities, and The Hatcher Group.

These case studies make it clear that coalitions succeed when they employ thoughtful strategies that are carefully implemented. We hope that each story will offer advocates in other states a wealth of guidance as they implement their own EITC campaigns.