

## **Share Our Strength Community of Practice Grant Case Study: Louisiana**

*Improving Access to Tax Credits for Families*  
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*April 2023*

The American Rescue Plan Act of 2021 (ARPA) temporarily expanded the child tax credit (CTC) for most families with children. The CTC was already a key policy that reduces poverty among children and their families along with the earned income tax credit (EITC; Fox and Burns 2021); the CTC expansion increased the maximum credit for many and extended benefits to very low-income families who had previously been ineligible for the CTC or received only limited benefits (Tax Policy Center 2021). ARPA also mandated that up to half of a family's expected CTC be delivered as advanced payments. Families received monthly payments from July through December 2021. Shortly after payments began, food hardship dropped (Perez-Lopez 2021).

### **Barriers to Receiving CTC**

To be eligible for the CTC, adults must have a child under age 17 that has a Social Security Number (SSN). The claiming adult is required to have either an SSN or an Individual Taxpayer Identification Number (ITIN). An ITIN helps those considered ineligible for SSNs comply with federal tax reporting and are generally used by noncitizens. For many families, monthly payments of the CTC began shortly after the ARPA passed, with the IRS using family and bank information provided on tax returns filed in 2019 or 2020. However, families with very low incomes, who often had not previously filed a tax return, were more likely to need to actively apply for the CTC and thus were at risk of missing out on the monthly payments. Families with very low incomes are often not required to file a tax return as they are below the filing threshold and are not eligible for tax credits with income requirements. In limited cases, the IRS may have been able to send advanced monthly payments based on information individuals provided to claim an economic impact payment (i.e., stimulus check) in calendar year 2020. But often these families would need to apply to receive the CTC. Even when a tax return had been filed, it could contain outdated information on who is supporting a child, which could result in money being sent to the wrong person. For example, if a child's parents are not married, the filer claiming the child could change from year to year (including grandparents and other guardians). Previously filed tax returns also would not include children born after those tax returns were filed. Those most likely to miss out on the automatic advanced payment were Hispanic/Latinx families, non-Hispanic/Latinx adults who are American Indian/Alaska Native, Native Hawaiian/Pacific Islander, or more than one race; adults with very low incomes, Spanish-speaking households, and families with mixed immigration statuses (Fischer et al. 2022; Karpman et al. 2021).

## **Description of Initiative**

To improve awareness and take-up of the newly expanded CTC, Share Our Strength, a national organization working to end childhood hunger and poverty in the United States, provided grants to organizations and Volunteer Income Tax Assistance (VITA) sites in 13 states to improve outreach, tax assistance, and policy advocacy following the regular tax season (the regular tax season to file 2021 taxes opened January 24, 2022, and ended April 18, 2022). These organizations came together as a community of practice, learning together and sharing information in pursuit of their common goals. To facilitate learning from the experiences of the community of practice, the Urban Institute conducted an assessment of their successes, challenges, strategies, and results. These insights can inform ongoing outreach efforts for the expanded CTC, as well as outreach efforts for other tax benefits directed toward low- and middle-income families like the EITC. The most recent IRS and Census estimates of EITC participation suggest that 22 percent of eligible taxpayers failed to claim the EITC in 2018 (IRS 2022).

## **The Community of Practice**

Share Our Strength worked throughout the grant period to intentionally build a community of organizations engaging in similar work. Share Our Strength regularly checked in with grantees and conducted bimonthly peer learning calls that involved experts sharing information on relevant topics including outreach and media and how to collect stories from clients, among others. Share Our Strength offered grantees access to SimplifyCT, a nationwide virtual VITA service that provides one-on-one support for grantees with questions about the CTC application process via a tax advice hotline. Another key partner of Share Our Strength is Code for America, a nonprofit organization that seeks to reduce the gap between the public and private sectors in their use of technology and design. The organization provided technical assistance on outreach and the use of GetCTC Simplified Filing Portal. Share Our Strength partnered with the National Disability Institute (NDI) to increase awareness of the CTC and other tax credits within the disability community. NDI provided office hours and webinars to grantee and subgrantee staff throughout the grant period on best practices to reach taxpayers with disabilities. Share Our Strength engaged a policy expert to consult with grantees advancing state-level tax policies. Finally, grantees could communicate with each other through the community of practice's Slack channel to share updates, questions, and lessons learned.

## **The Case Studies**

The Urban Institute's assessment of the community of practice initiative includes a case study of grantees in 10 states, as well as two briefs on nationally focused work being led by the NDI and work with Native communities in three additional states (Montana, South Dakota, and Minnesota) supported by the Oweesta Corporation. Case study reports summarize and document grantees' activities, strategies, successes and challenges, best practices, and any actions taken toward improving equitable receipt of the CTC. The Community of Practice focused on four areas of work:

- Outreach intended to improve knowledge about tax benefits
- Tax assistance for families that had not yet received the CTC or other state or federal tax credits
- Collection of narratives that could help policymakers and advocates understand the importance of tax benefits
- Policy work intended to improve tax benefits in the future

This case study describes our approach and provides an overview of the grantees in Louisiana and their grant-funded activities, including their policy, outreach, and tax assistance work, and closes with information on their lessons learned and future goals. The material in the case study is based on the interviews that we conducted with grantees, subgrantees, and partners. Subgrantees are defined as organizations that received direct funding from the grantee, whereas partners are groups that grantees collaborated with without exchanging money.

## Case Study: Louisiana

### *Louisiana State-Level Tax Environment*

People in all states have access to the federal tax credits, but in some states, additional state tax credits benefiting similar populations exist. Louisiana has a fully refundable state EITC and offers the child and dependent care tax credit (CDCTC).

TABLE 1

#### Louisiana State Tax Credits

Tax Credit	About
Earned income tax credit	Yes (refundable <sup>1</sup> ); 5% of federal credit
Child tax credit	No
Other tax credits	Child and Dependent Care Tax Credit (CDCTC)

Source: Waxman, Samantha, and Iris Hinh. 2023. “States Can Enact or Expand Child Tax Credits and Earned Income Tax Credits to Build Equitable, Inclusive Communities and Economies.” Washington, DC: Center on Budget and Policy Priorities.

<sup>1</sup>Nonrefundable tax credits can only be used to offset taxes owed. If a family qualifies for a tax credit worth more than they owe in state income taxes, the excess is lost. Families receive the full value of refundable tax credits. See “What Is the Difference between Refundable and Nonrefundable Credits?” Tax Policy Center Briefing Book, Tax Policy Center, accessed February 20, 2023, <https://www.taxpolicycenter.org/briefing-book/what-difference-between-refundable-and-nonrefundable-credits>.

Nationally, an estimated 79.3 percent of eligible taxpayers claimed the federal EITC in 2019, and in Louisiana, 80.9 percent of eligible taxpayers claimed the federal EITC (IRS 2022). Families eligible for larger benefits are more likely to receive the EITC and the majority of people eligible for the EITC that do not receive the EITC do not file a tax return (Holt and Duratinsky 2021; Goldin 2018). CTC participation is less well understood. In general, participation is likely higher than that of the EITC. The vast majority of families eligible for the CTC file tax returns each year. In 2021, the participation rate likely dropped slightly since families not required to file a return were made eligible for the full benefit.

## *Demographic Data on Families with Children*

The national median annual household income for households with children under 18 in 2021 was \$84,197 and was \$64,200 in Louisiana.<sup>1</sup> The average national child poverty rate in 2021 was 16.9 percent, compared with 26.9 percent in Louisiana.<sup>2</sup>

A majority of people in Louisiana identify as white, non-Hispanic (57.8 percent), 31.7 percent identify as Black, non-Hispanic, 5.3 percent identify as Hispanic/Latinx, 3.5 percent identify as American Indian, Native Hawaiian and Pacific Islander, or some other race or two or more race, and 1.7 percent identify as Asian, non-Hispanic.<sup>3</sup> Louisiana also has a food insecurity rate of 14.5 percent compared with 10.4 percent nationally.<sup>4</sup> The governorship is currently held by a Democrat and the Louisiana's Senate and House leadership are Republican.

## *Grant Structure in Louisiana*

The main grant recipients are Capital Area United Way and the Middleburg Institute. They work with 12 subgrantees and partners within the state: Catholic Charities, City of Baton Rouge, CR-O, KQRP, Louisiana Budget Project, Morehouse Black Farmers and Landowners, a Pointe Coupée Parish community organizer, Quality Workforce Solutions, Roy Law Firm, a Shreveport community-wide asset building advocate, St. James Parish, and the Transformative Therapy Center.

We conducted interviews with Capital Area United Way, KQRP, the Middleburg Institute, and a Pointe Coupée Parish community organizer in the summer and fall of 2022. Figure 1 shows the grantee and subgrantee network, and table 1 describes the organizations we interviewed.

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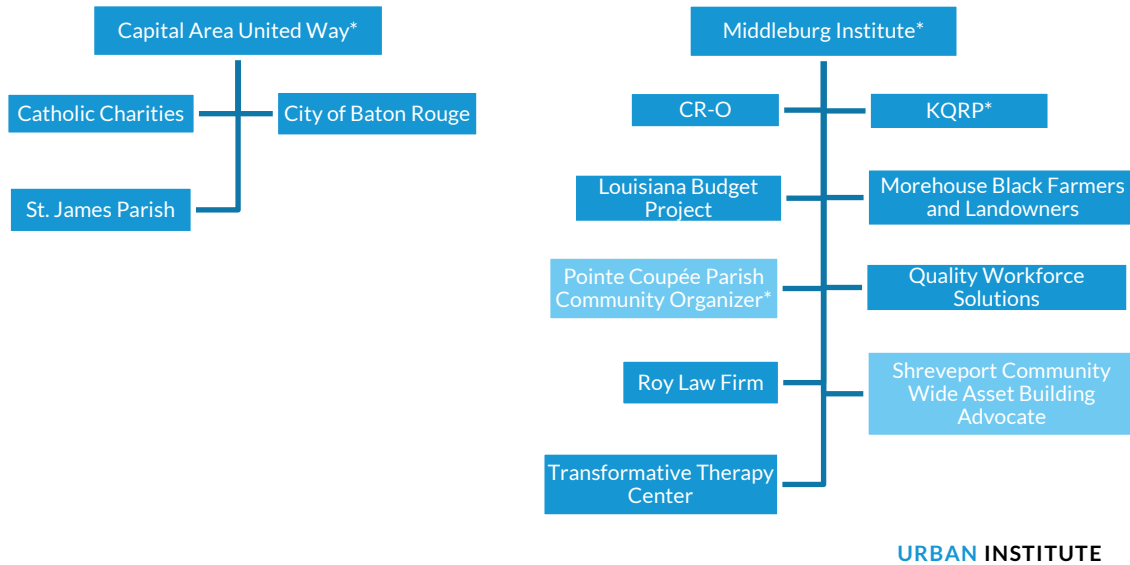
<sup>1</sup> "Median Family Income in the Past 12 Months (In 2021 Inflation-adjusted Dollars) by Presence of Own Children Under 18 Years," Table B19125, ACS 2021 1-year, Census Reporter, 2021, [https://censusreporter.org/data/table/?table=B19125&geo\\_ids=040|01000US&primary\\_geo\\_id=01000US](https://censusreporter.org/data/table/?table=B19125&geo_ids=040|01000US&primary_geo_id=01000US).

<sup>2</sup> "Small Area Income and Poverty Estimates (SAIPE): Under Age 18 in Poverty," United States Census Bureau, 2021, [https://www.census.gov/data-tools/demo/saipe/#/?s\\_measures=u18](https://www.census.gov/data-tools/demo/saipe/#/?s_measures=u18).

<sup>3</sup> See table DP05 from the 2021 5-year ACS estimates in "Census Data," United States Census Bureau <https://data.census.gov>.

<sup>4</sup> Alisha Coleman-Jensen, Matthew P. Rabbitt, Christian A. Gregory, and Anita Singh, "Household Food Security in the United States in 2021," September 2022, <https://www.ers.usda.gov/publications/pub-details/?pubid=104655>.

**FIGURE 1**  
**Grantee, Subgrantee, and Partner Network in Louisiana**



**Source:** Share Our Strength Community of Practice.

**Notes:** We interviewed those with an \* next to the name. Grantees and subgrantees are in dark blue. Partners are highlighted in light blue.

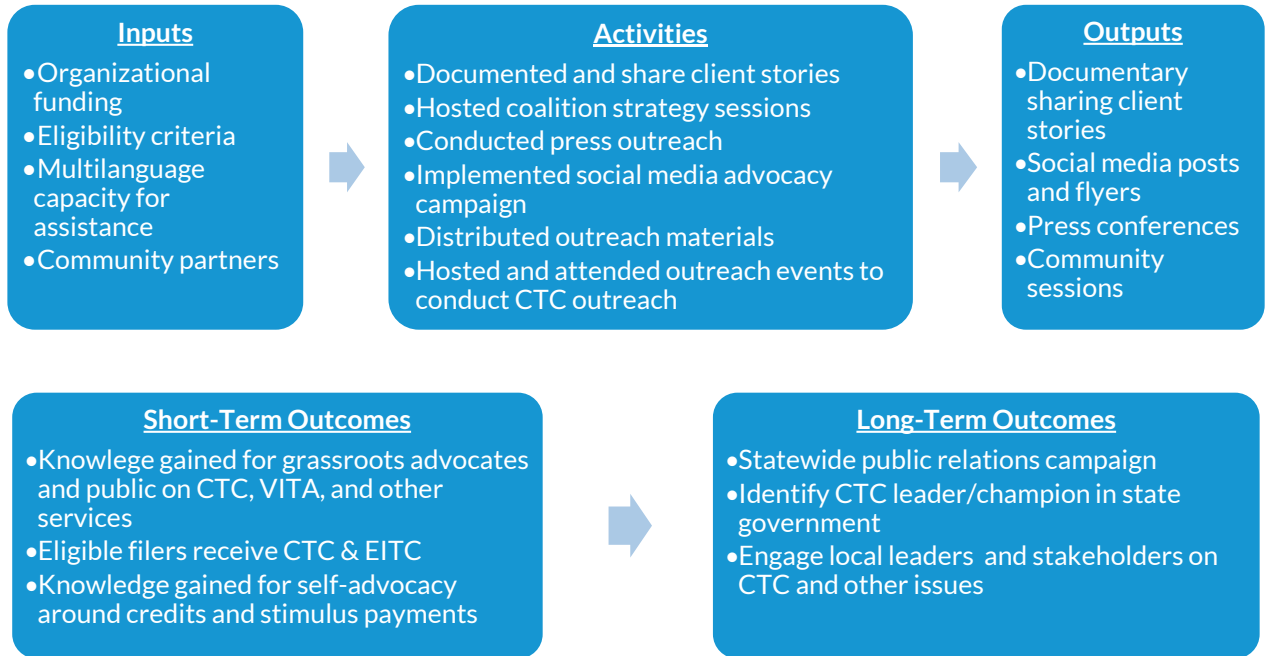
**TABLE 2**  
**Description of Interviewed Grantees and Subgrantees in Louisiana**

Grantee/ Subgrantee	Description of Organization	Grant Activities	Target Population
<b>Capital Area United Way</b>	Statewide organization working to improve social and economic conditions	Provided year-round tax services at three subgrantee sites; conducts outreach for general tax preparation services and CTC, EITC, and ITIN outreach; supports subgrantees in improving outreach tactics	Families with children, limited-English proficiency households, immigrant households, and communities of color; some work focused on students and people in rural areas
<b>The Middleburg Institute</b>	Nonprofit that advocates for social and economic stability for Louisiana residents	Partnered with local officials and grassroots organizations to conduct outreach and expand access to CTC across the state	Families with children, and underserved communities, like communities of color and immigrant households
<b>KQRP</b>	Photographer and videographer	Worked with the Middleburg Institute to capture outreach efforts and develop a documentary	Community members receiving information about CTC
<b>Pointe Coupée Parish Community Organizer</b>	Organizer and advocate for social and economic improvements in Pointe Coupée Parish	Organized and conducted outreach efforts in Pointe Coupée Parish; hosted educational events, distributed flyers, and engaged with local leaders to expand CTC access in the parish	Low-income families and some new work to reach out to Spanish-speaking households

**Source:** Organization websites and interviews with grantees and subgrantees.

FIGURE 2

**Logic Model for the Middleburg Institute**



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## Outreach Work

Grantees identified a minimum of two communities in their state to deliver post-tax season outreach to encourage enrollment in the CTC, EITC, and other relevant benefits. Grantees were allowed to develop and employ a wide range of strategies. Some grantees utilized GetCTC’s unique URL system, an outreach tracking weblink that allowed GetCTC staff to track how many people were reached that started a tax return—a helpful metric in gauging effectiveness of outreach strategies. GetCTC is a national online platform developed by Code for America (CFA) that allows families with children with incomes below \$25,000 to claim a CTC without filing a full tax return. Upon request, CFA created a unique URL for organizations working on reaching out to these communities to use to better track how people found GetCTC.

Louisiana’s outreach strategy centered around building general awareness through a multitude of partners and stakeholders.

### *Capital Area United Way*

- Coordinated a state-wide outreach campaign to advertise CTC and tax preparation services; advertisements included flyers, radio and television advertisements, digital and print advertisements, and an information booth at a school
- Partnered with other organizations to promote GetCTC.org; worked with a local utility company to share information on tax credits to 300,000 people on social media

- Provided information at more than 10 public outreach events
- Facilitated two focus groups to improve volunteers' and community members' understanding of tax issues and services
- Broadened outreach efforts to reach non-English language speakers and immigrant communities; conducted outreach to Hispanic community through advertisements on Spanish-language radio stations and increased ITIN services outreach

### *The Middleburg Institute*

- Led outreach efforts across Louisiana and collaborated with numerous community-based organizations and trusted leaders
- Organized in-person events, attended existing festivals, and distributed flyers to advertise CTC
- Built relationships with trusted community-based organizations and local elected officials, including mayors, state representatives, and the lieutenant governor
- Conducted outreach to immigrant communities, specifically through events tailored to Hispanic and Vietnamese residents, offering materials in Spanish, and partnering with an organization to improve outreach to Hispanic community

### *Pointe Coupée Parish Community Organizer*

- Led outreach across Pointe Coupée Parish through community events, flyer distribution, and posting newspaper advertisements to inform residents of CTC
- Conducted meetings with parish president and councilmen to inform and encourage officials to spread information about CTC
- Coordinated with religious leaders and school administrators as trusted leaders to broaden reach

### *Successes*

- **Operating multiple tax preparation sites:** Capital Area United Way was able to offer free tax preparation services through October at two of their tax preparation sites and they began to offer year-round tax preparation services at their third site for the first time. The organization also held mobile tax service events in community centers, churches, nonprofits, hospitals, and other community areas.
- **Collection of client narratives:** In partnership with the Middleburg Institute, KQRP captured the perspectives of Louisiana families who could benefit from the CTC. The documentary is a venue for underserved residents to share their stories and will be a valuable tool in future outreach and advocacy.
- **Meeting people where they are:** The Middleburg Institute brought information directly to the community. The organization held outreach events in community centers and reached rural

areas of the state by hosting field days in farming communities. These methods were key to finding people who did not regularly access other mediums, such as social media.

- **Leveraging trusted partners and word of mouth:** Grantees used trusted partners to disseminate CTC resources and increase access to tax preparation services. For example, the Middleburg Institute used trusted community organizers and local elected officials in their outreach efforts. Each of the grantees and subgrantees also encouraged community members to share resources within their networks. Word of mouth was an essential outreach tactic, especially through family members and other trusted community leaders.
- **Engaging immigrant communities:** Generally, lower trust and greater hesitance to engage with government programs exists in immigrant communities. Capital Area United Way focused on promoting ITIN application services, which would enable individuals to receive the CTC, and the Middleburg Institute hosted outreach events to engage Vietnamese and Latinx residents.
- **Spanish language accessibility:** The Middleburg Institute, Capital Area United Way, and Pointe Coupée Parish organizer provided resources in English and Spanish.
- **Utilizing unique QR codes:** Grantees used unique QR codes on informational materials. This allowed them to track how effective their outreach efforts were and better understand the ways the community engaged with the information.

### *Challenges*

- **Difficulty reaching schools and specific communities:** Capital Area United Way would like to conduct outreach and offer tax sites in schools, but they have found it difficult to maintain engagement with the school system. The organization was also unable to effectively roll out mobile tax sites in rural communities and would like to expand outreach to active-duty military.
- **Lack of awareness in local government:** Access to the CTC may have been more limited because local officials in Pointe Coupée Parish initially did not know about the CTC and resources for residents to access the CTC.
- **Additional language accessibility:** Capital Area United Way's partner organizations do not have enough volunteers that can offer services in a range of languages. Having staff that speak additional languages would allow them to serve previously excluded communities and develop resources in additional languages.



FIGURE 3

Child Tax Credit Outreach Flyer Used in Donaldsonville, Louisiana

**DONALDSONVILLE**  
Respecting Our Past  
Building Our Future

## HAVE CHILDREN UNDER 18?

UNDER THE AMERICAN RESCUE PLAN, YOUR FAMILY RECEIVES  
the #ChildTaxCredit. Cash paid directly to your family:  
**up to \$3,600 per child**

**HOW DOES IT WORK?**

- You must file your 2021 taxes to begin the process
- You can receive up to \$3,600 per child.

**IS MY FAMILY ELIGIBLE?**

- ANY family with children can benefit, as long as the child has a social security number.
- Employment & income are NOT required.
- The child must be under 18 on December 31, 2021.
- The child must live with you most of the time.

**DO I NEED TO REGISTER?**

- You do not need to take action, as long as you have filed a 2020 or 2021 tax return. You will receive the Child Tax Credit automatically.
- If you have not registered, don't worry, we can do it for you. If you haven't received your stimulus checks, we can help you with those too.

**HOW DO I GET STARTED?**

Just fill out a simple form online: [www.GetCTC.org/Hotline](http://www.GetCTC.org/Hotline)  
Or, for additional help, call us toll free at (877) 999-0870  
There is NO CHARGE for any of our services.

**SHARE OUR STRENGTH**

**Saturday, November 5 | 10am-12noon**  
**WAG CENTER - 1201 Maginnis Street | Donaldsonville**  
For info, call 225.445.1383 or email [lee@visitdonaldsonville.org](mailto:lee@visitdonaldsonville.org)

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## Tax Assistance Work

Grantees in the cohort can either be statewide nonprofit organizations that engage in advocacy, policy, and outreach work, or they can be VITA sites. VITA sites offer free tax preparation help to low-income individuals, persons with disabilities, the elderly, and non-English speakers that otherwise face barriers preparing tax returns, including claiming valuable tax credits. Nationally, about 60 percent of tax returns are prepared with the help of a tax preparer, though it is not a requirement that one be used. Although VITA sites are used to prepare a relatively small amount of all returns (less than 2 percent of tax returns with incomes less than \$30,000 are filed each year with VITA sites), they provide a critical resource that allows people to avoid costs associated with using a paid tax preparer and receive the full value of their tax credits.<sup>5</sup>

In Louisiana, Capital Area United Way operates three direct tax preparation sites through their subgrantees. The Catholic Charities and the City of Baton Rouge locations are open from the beginning of the tax season through October. With the Share Our Strength funding, the organization could operate their site in St. James Parish year-round to increase access for rural residents.

During the tax season, the sites focus on filing taxes and securing tax credits for the current year, and then work with families in the off-season to file taxes for prior years. In addition to standard tax preparation work, Capital Area United Way focused on serving immigrant populations, and offered ITIN outreach and application services.

The Middleburg Institute and the Pointe Coupée Parish community organizer are not involved in direct tax preparation services. Instead, they focus on CTC outreach and referred residents to VITA sites for any tax preparation needs.

During the grant period, grantees in Louisiana did the following:<sup>6</sup>

- Filed **roughly 1,200** tax returns
- Helped individuals claim **roughly \$90,000** in CTCs and EITCs

## Collecting Participant Data

Share Our Strength believes that client narratives can be a powerful advocacy tool, helping policy makers understand the impact of tax credits for low-income families. Capital Area United Way collected client testimonies and has used these stories in general campaigns for United Way. They also compiled data on the number of clients in their service area that received the CTC to support these testimonies.

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<sup>5</sup> “Why Do Low-Income Families Use Tax Preparers?” Tax Policy Center’s Briefing Book, Tax Policy Center, accessed March 23, 2023, <https://www.taxpolicycenter.org/briefing-book/why-do-low-income-families-use-tax-preparers>.

<sup>6</sup> These numbers are approximate and are pulled from ongoing reporting completed during the grant period. These may be inaccurate due to fluctuations and inaccuracies in the reporting process.

The Middleburg Institute was also interested in amplifying their engagement efforts and partnered with a photographer and videographer through KQRP to [create a documentary highlighting their work](#) to increase CTC access across the state. KQRP filmed community events and interviewed residents and local leaders to highlight their outreach. The goal of the documentary is to highlight the experiences of Louisiana residents who would benefit from the CTC. The Middleburg Institute intends to use this documentary in additional advocacy work and in future outreach efforts to connect with community members.

## Policy Agenda

Share Our Strength also encouraged their grantees to partner with key stakeholders to identify and implement strategies to advance legislative or administrative priorities aimed at increasing access to tax credits. Most states include advocating for a state-level refundable CTC or EITC if the state does not already have one in their policy priorities. Other priorities include administrative changes such as creating simplified filing portals, advocating for tax forms in different languages, and data sharing between the IRS and state agencies. In regard to the simplified filing portals, at the time of the advanced CTC payments, the IRS faced a tremendous backlog of paper forms (GAO 2022). Families were encouraged to claim the CTC electronically to avoid new paperwork getting caught up in existing delays.<sup>7</sup> Given the diversity of political environments across the cohort, this work may have taken many forms. Unlike short-term outreach efforts to increase access to tax credits, policy work is typically a long-term endeavor.

In Louisiana, the policy environment is “a space that takes a lot of work,” as stated by the Capital Area United Way. “You need both sides at the table to be in agreement.” The Middleburg Institute led the policy efforts, given their existing relationships with grassroots organizations and elected leaders across the state. Their long-term policy goal is a permanent expansion of the federal CTC, and they primarily focused on building relationships with various policy stakeholders across the state. The Middleburg Institute connected with mayors, state representatives, school boards, and the lieutenant governor to discuss the availability and importance of the CTC for Louisiana residents. They also worked with policy analysts at the Louisiana Budget Project to better understand the legislative process, local politics, and opportunities to secure a state-level CTC. The Louisiana Budget Project is laying the groundwork for a statewide CTC that they are framing as a strong families tax credit (Butkus 2019). In Pointe Coupée Parish, the community organizer met with local parish officials to discuss the CTC. They focused on educating officials, as most were unaware of the CTC as a program that could benefit their parish. In some cases, local leaders became champions of the CTC. For example, the mayor of Donaldsonville played a key role in promoting the CTC to the community and communicating with other elected officials on the benefits of the CTC for their city.

Capital Area United Way primarily focused on providing tax assistance services and serving as a link for the statewide advocacy effort. The organization also collects data that could be used by other

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<sup>7</sup> “2022 Tax Filing Season Begins Jan. 24; IRS Outlines Refund Timing and What to Expect in Advance of April 18 Tax Deadline,” IRS, January 10, 2022, <https://Content.Govdelivery.Com/Accounts/USIRS/Bulletins/304f388?Reqfrom=Share/>.

grantees/subgrantees in their policy efforts. While they are not a policy-focused organization, they are in discussion with the Louisiana Budget Project regarding a potential partnership to advocate for additional state-level tax credits. One output of this partnership included an article advocating for an expansion of the state-level earned income tax credit.<sup>8</sup>

## Lessons Learned and Future Goals

The expanded CTC in 2021 included substantial benefits for people who had previously received no or limited benefits from the CTC. To deliver those benefits, advocates in many states worked together to reach the communities least likely to receive the credit including Hispanic/Latinx, American Indian/Alaska Native, Native Hawaiian/Pacific Islander, and low-income families. The temporary nature of the credit also offered an opportunity for organizations to advocate for the credit's continuation at the federal level, or supportive state policies.

Share Our Strength facilitated groups in states working together toward improved outreach, policy and advocacy, and access to tax assistance. This community of practice met regularly, shared strategies, and generally coordinated efforts in the hopes of having a larger impact than they would have if they had not collaborated.

### *Lessons Learned*

- Trust is essential for outreach efforts, especially when promoting a government program. Involving trusted leaders and community members increases their outreach legitimacy. The Middleburg Institute, Capital Area United Way, and a Pointe Coupée Parish community organizer found that providing information in multiple languages also increased trust and improved outreach efforts.
- For organizations that provide direct tax preparation services, the lower need for individual tax services in the off-season can provide an opportunity to focus on general tax education and awareness.
- Different messaging is needed when discussing tax credits. There may be fear in immigrant and other communities when discussing taxes and/or the IRS. The Middleburg Institute found it was valuable to modify the term “tax credit” and made it clear at community events that they were not associated with the IRS.
- Presenting information in multiple languages and dialects is essential to build trust in immigrant and other marginalized communities. For example, the Middleburg Institute held community events and made it a priority to introduce themselves to the community in their preferred languages and dialects.

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<sup>8</sup> An Moller and Delores Hurst, “Guest Column: It's Time to Expand Louisiana's Earned Income Tax Credit,” February 6, 2023, Nola, [https://www.nola.com/opinions/guest-column-iexpand-state-earned-income-tax-credit/article\\_345935d0-a645-11ed-b03d-17fb48a8edb8.html](https://www.nola.com/opinions/guest-column-iexpand-state-earned-income-tax-credit/article_345935d0-a645-11ed-b03d-17fb48a8edb8.html).

- It is important to prioritize the staff and volunteers that provide outreach and tax preparation services. Organizations are better able to serve the community when staff and volunteers feel valued.
- The use of client narratives is important, as it gives residents a platform to share their stories and feel connected to others with similar experiences. The Middleburg Institute noted that, “The Middleburg was formed to connect with low to mod[erate] income communities and to be a representative, not their voice, and not because they’re voiceless, but because they’re not asked.”

### *Future Goals*

- Capital Area United Way would like to apply insights learned from NDI. They are exploring options to ensure that tax sites are accessible for people with physical disabilities.
- Capital Area United Way understands they have not reached all communities, so they would like to offer tax preparation services in additional languages.
- Schools are an important avenue to disseminate information. Capital Area United Way is interested in restarting a tax site at a local high school and the Pointe Coupée Parish community organizer would like to distribute information through flyers that children bring home from school.
- The Pointe Coupée Parish community organizer would like to expand outreach efforts to focus on small businesses. A strong sense of community exists in the parish, and many business owners would pass on information that could support their employees and their families.
- Capital Area United Way collects data that could be useful to organizations that are more engaged in policy work at the state level. They are willing to share these data to support policy initiatives in Louisiana. Both Capital Area United Way and the Middleburg Institute intend to continue their policy efforts in partnership with the Louisiana Budget Project.
- The Middleburg Institute will continue efforts to expand awareness of the CTC and other programs that can alleviate poverty. These efforts will include distributing information to educate communities, engaging with marginalized and low-income communities, increasing their social media presence, and building collaborations statewide.

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## Acknowledgments

This case study was funded by Share Our Strength. These case studies were produced in partnership with Share Our Strength, who facilitated the Community of Practice. We are grateful to them and to all our funders, who make it possible for Urban to advance its mission.

The views expressed are those of the authors and should not be attributed to the Urban Institute, its trustees, or its funders. Funders do not determine research findings or the insights and recommendations of Urban experts. Further information on the Urban Institute’s funding principles is available at [www.urban.org/fundingprinciples](http://www.urban.org/fundingprinciples).



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