

Vibrant Communities Edmonton's Make Tax Time Pay Campaign

In 2004, during the formulation of a three-year strategic plan for Vibrant Communities Edmonton (VCE) a participant from Alberta Human Resources and Employment realized that partnering with VCE could help the Ministry address a long-standing challenge: Finding new and better ways to inform low-

income Edmonton residents about the Alberta Child Health Benefit (ACHB). This provincial program provides, on average, \$265 a year per child for prescription drugs, dental and optical care, and emergency ambulance services.

Says AHRE Area Manager Jane Chase: "Alberta Human Resources and Employment had developed several strategies to better publicize ACHB but uptake levels were holding steady at 36 percent for the Edmonton area. We knew that another 14,917 residents were eligible for benefits but were not collecting them. Our involvement with VCE provided us with an exciting option for reaching a wider group of people, using the initiative's extensive network of community partners and collaborators."

Established in 2002, Vibrant Communities is a pan-Canadian initiative that explores promising local solutions to reduce poverty. Fifteen communities from across Canada have formed a learning partnership through which they share ideas, resources and strategies related to poverty reduction. Each of the participating communities already had done considerable work to alleviate poverty and saw Vibrant Communities as a way to extend and enrich their efforts. This story is the ninth in a series which highlights successful strategies for reducing poverty and building caring communities.¹ For more information, visit: <http://www.vibrantcommunities.ca>

The ACHB uptake issue underlined the difficulties low-income earners face in making ends meet. If they are unaware of existing health care support programs, families tend to give preventive procedures like dental cleanings and eye checkups a lower priority in the household budget. Ultimately, however, this type of care can affect family members' long-term health, and potentially, their work performance.

Karen Gingras, Executive Director with the Edmonton Community Loan Fund and Jenny Kain, a social planner with the City of Edmonton's Community Services Department, were co-managing the development of VCE's initial strategic plan. Both were quick to see that the ACHB promotion idea could have much broader application, and it fit perfectly with Vibrant Communities Edmonton's main goal of helping families achieve economic success. VCE's efforts focus on three strategies:

- Increasing Family Economic Supports – helping families to strengthen their economic profile by improving access to benefits and resources, and learning more about financial literacy
- Community Investments – working with the community to design and implement banking and homeownership strategies for working poor and low-income families
- Workforce Development – challenging employers to make workforce investments which will improve employee recruitment and retention; helping employees enhance their careers and improve their incomes and job security.

Karen and Jenny had shepherded VCE through its initial Steering Committee phase, overseeing the development of the project's strategic plan, funding profile and overall approach. At a transition meeting in December 2003, the Steering Committee was replaced by a Leadership Council with representatives from multiple sectors – business, government, community organizations and groups representing the needs of low-income residents. Now co-chaired by Mathilde Balu, citizen representative, and Dr. Wayne Shillington, President of NorQuest College, the Leadership Council began to develop program options for moving forward VCE's three

foundational strategies. Throughout 2004 and early 2005, Karen Gingras conducted research and interviewed key informants about the best ways to approach a benefits awareness campaign. VCE Leadership Council members continued to provide suggestions and feedback.

Alberta Human Resources and Employment staff had discovered that people living on low incomes do not access the Alberta Child Health Benefit for a number of reasons: they don't know the program exists, they delay filing or registering for the programs or they believe the registration process is too difficult. By offering timely information and help, VCE hoped to remove some of the barriers to family economic success.

Karen researched the impact of increasing uptake of the earned income tax credit in the US and used her contacts at Canada Revenue Agency, the municipality and the province to identify six other benefit and subsidy programs for which low-income families could be eligible. Another three tax credits would automatically be received by people who submitted their benefit and tax forms.

In mid-2005, VCE's Leadership Council established a subcommittee within its Increasing Family Economic Supports framework to plan the many elements in a campaign that would result in a higher uptake of the ten benefits, subsidies and tax credits. These included identifying and securing tax assistance locations which would be accessible to low-income families, providing the necessary training and support materials for volunteers, preparing an infrastructure that could handle the increased number of benefits applications, and planning a publicity and education campaign.

The Make Tax Time Pay campaign design was made more effective by the variety of people

involved: citizens, community-based organizations, business people, and municipal, provincial and federal stakeholders who provided information on programs, feedback on the package of prepared materials and input on what would be most helpful from the perspective of program beneficiaries.

Karen Gingras was made Executive Director of VCE in the spring of 2005. Says Karen: “All too often, people find themselves in jobs that leave them struggling to pay their basic needs. Because they are working, they tend to fall through the cracks and aren’t aware of programs that provide key services to families and individuals who earn low incomes.”

Working together to make tax time pay

To ensure that its members were building on existing infrastructure, Vibrant Communities

staff met with representatives from other community and government organizations that provide assistance to citizens during tax time. Since 1970, for example, Canada Revenue Agency’s Community Volunteer Income Tax program has trained community agency volunteers in centres across the country to help people prepare their federal income tax returns. Canada Revenue Agency (CRA) secures temporary locations during the tax season and agency volunteers run the clinics.

In collaboration with CRA, Vibrant Communities Edmonton decided to launch a multifaceted benefits uptake campaign which it named Make Tax Time Pay. The name is appealing because it immediately communicates the message that filling in tax forms – usually considered an unpleasant task – also can have a positive outcome: more money in your pocket. It also offers to people who are less financially literate a healthy alternative to fringe banking institutions which promise help with tax filing – at a hefty price.

VCE’s Make Tax Time Pay campaign will help Edmonton residents to access

Benefits:

- 1. Alberta Child Health Benefit
- 2. Alberta Adult Health Benefit
- 3. Leisure Access Program

Subsidies:

- 4. Alberta Health Care Premium Subsidy
- 5. Alberta Blue Cross Premium Subsidy
- 6. Child Care Subsidy
- 7. Out-of-School Care Subsidy

Tax Credits:

- 8. Alberta Family Employment Tax Credit
- 9. GST Credit
- 10. Child Tax Credit

Government organization:

Alberta Human Resources and Employment
 Alberta Human Resources and Employment
 City of Edmonton

Alberta Health and Wellness
 Alberta Health and Wellness
 Alberta Children’s Services
 City of Edmonton

Government of Alberta*
 Government of Canada*
 Government of Canada*

* issued automatically when income taxes are filed

In 2005, CRA figures showed that approximately 23,000 Edmonton residents were helped in this manner by volunteers from 30 community agencies. Agency figures from 2006 will help VCE to determine the effectiveness of its Make Tax Time Pay campaign.

Building community awareness requires many partners. VCE citizen representatives Fatima Tahri and Mathilde Balu helped shape the subcommittee's thinking about the best ways of reaching English as a Second Language and new immigrant groups. Members of the Edmonton Chamber of Commerce and the local branch of the Canadian Federation of Independent Business attended VCE overviews in the fall of 2005, and both agreed to inform their organizations about the Make Tax Time Pay campaign.

Funds and in-kind donations for the initiative came from many sources. VCE Leadership Council member Tom Olenuk's employer, the Edmonton and District Labour Council, will help raise funds to cover the postage required to mail benefit applications. The City of Edmonton has provided matching funds for VCE activities over three years, as well as in-kind staff support in the areas of project development and evaluation. VCE co-chair Dr. Wayne Shillington, President of NorQuest College, loaned his media relations assistant, Martin Schuldhaus, to the campaign. Martin's expertise in working with the media was instrumental in marshalling the positive radio, television and print coverage received to date, and in designing the campaign's overall media strategy. The Support Network (see next page) will act as the initiative's call centre. Network staff will respond to questions and refer callers to appropriate government departments and websites.

“Our community is known for its history of innovative approaches to solving some of

the challenging and complex issues related to achieving family economic success,” says Karen Gingras. “The contribution of VCE in the Make Tax Time Pay campaign will be to build and broker multisectoral involvement in these solutions and strategies.”

Karen's earlier research into tax credit uptake in the US underlined the importance of citizen involvement in outreach campaigns. Members of Edmonton's On 'R Own Home Society, an organization whose members live in affordable housing complexes, had attended a presentation by (then) VCE co-chair Jenny Kain on community economic development. Jenny mentioned the work of Vibrant Communities and the opportunities for community involvement it presented. During a subsequent meeting with Karen, On 'R Own Home members agreed to act as a citizen sounding board to the VCE Make Tax Time Pay initiative.

Society Board member Liz Palko is pleased to act as a contact point for agencies like VCE. Says Liz: “Our organization has grown from nine housing complexes to 28 in seven years and our network directly reaches 1,500 or 1,600 families with information. The low-income community trusts word-of-mouth endorsements and news spreads rapidly, so untold thousands will hear about Make Tax Time Pay.”

The VCE Make Tax Time Pay subcommittee now includes seven members, with representation from Alberta Human Resources and Employment, the Canada Revenue Agency, the City of Edmonton, Multicultural Health Brokers Co-operative, and local citizens who are working and earning low incomes. Additional advice was received from the Edmonton Chamber of Commerce, the Canadian Federation of Independent Business and The Support Network. As the campaign progresses, the list of partner organizations likely will grow.

The Support Network's new 211 line – fast, friendly, vital

The Support Network is a nonprofit organization in Edmonton which offers community information, crisis and suicide prevention services. It was formed in 1993 when two similar crisis management organizations merged and today operates with 35 paid staff and approximately 200 volunteers.

In addition, The Support Network operates Edmonton's 211 Community Service Information and Referral Line. It also posts information to its website to allow citizens direct access to information (www.thesupportnetwork.com/). After three years of development, the lines were opened in September 2004, making Edmonton the second city in Canada to offer such a service (Toronto's began in 2002, Calgary came in just after Edmonton). This type of telephone and on-line service is currently available to approximately 46 percent of US citizens.

Says 211 Supervisor Nancy Douglas: "The 211 line provides information and referrals to community service organizations and social service programs. For example, if a child is hooked on drugs or if a family needs shelter, we refer them to the agencies most suited to help. We also offer follow-up calls to clients to make sure their needs are met. The response from the community has been overwhelmingly positive. We field between 80 and 100 calls a day – many coming from professionals who are seeking additional services for their clients."

Edmonton residents also may call 211 to find out about volunteer opportunities and information about events going on in and around the city. Nancy and her staff of nine keep track of unmet needs and publish a quarterly report to funders and community planners. In turn, organizations that respond with new programs immediately contact the service to alert database users of their services (www.informedmonton.com). Says Nancy: "We know that in the past, it took the average client six or seven phone calls to find the help they needed. The big advantage of 211 is that we can point them in the right direction with the first call."

During the summer of 2005, the Make Tax Time Pay campaign design took shape and an official launch was held in November. Beginning in January 2006, public service announcements, posters and brochures delivered through a variety of organizations will help to promote the program throughout the community. From January to the end of April, Make Tax Time Pay partners will operate assistance centres in parts of Edmonton where there are high concentrations of people living on low incomes. Centres will be staffed by vol-

unteers recruited by the Canada Revenue Agency (CRA) and Vibrant Communities Edmonton (VCE). CRA staff will provide training in the completion of tax forms; VCE will show volunteers how to fill in the six other benefit and subsidy application forms and alert them to the three tax credits to which their income tax returns make them eligible. Each site will be equipped with information binders that provide program descriptions and filing details. Completed forms will be collected and mailed daily.

Indicators of success

If the Make Tax Time Pay campaign is successful in its goal of helping 500 more Edmonton families receive ACHB, these households will enhance their capacity to cover medical expenses by a total of \$132,500 (assuming one child per family). If all 14,417 remaining eligible residents applied to the program, that amount would climb to nearly \$4 million – money which would be paid to local service providers by the provincial government. Similarly, funds reimbursed to service providers by the Child Care, Out-of-School Care and Health Care subsidies will ensure that families hold on to money that otherwise would have to be paid from already very tight budgets.

Campaign organizers are refining a reporting form which will track applicants' filing history and past receipt of the ten benefits, subsidies and credits. Provincial ACHB records will help give an indication of how many more families receive the benefits once the tax season is over. Canada Revenue Agency will be able to compare how many people visit its tax filing centres in 2006 over previous years. All of these indicators will help VCE to gauge the campaign's impact and indicate areas for possible improvement.

The seed of interest dropped by a provincial ministry representative has bloomed into a dynamic assistance initiative which will involve dozens of helpers and, potentially, thousands of beneficiaries. Make Tax Time Pay is a prime example of how Vibrant Communities operates – by transforming participants' good ideas into initiatives which better the community as a whole.

Anne Makhoul

Anne Makhoul coordinates the 'community stories series' for the Caledon Institute of Social Policy.

Endnote

1. Other stories in this Vibrant Communities series include:

- *Waterloo Region's Guaranteed Income Supplement Campaign* (January 2005)
- *Quality of Life CHALLENGE in Victoria Invites Low-income Canadians to Speak for Themselves* (April 2005)
- *Assured Income for the Severely Disabled Public Policy Initiative* (May 2005)
- *Community Action in Saint John: Making a Difference in the Lives of Young People* (May 2005)
- *The Living Wage Learning Initiative* (May 2005)
- *Local Heroes: CAW 199 and Community Partners* (September 2005)
- *FairFares Calgary Celebrates Reduced Fare Transit Passes* (November 2005)
- *Victoria's Regional Housing Trust Fund: So Far, So Good* (November 2005)

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