

Trail Builder Update: Make Tax Time Pay 2007

Introduction – year one

In early 2006, Vibrant Communities Edmonton (VCE) launched a successful “Make Tax Time Pay” campaign. Part education program, part income tax preparation assistance program, it alerted low-income Edmonton residents to ten benefits, subsidies and tax credits for which they could apply [Makhoul 2006]. Make Tax Time Pay (MTTP) was an extension of work done by various agencies in previous years to help residents of all ages and incomes fill out their tax forms. In time for tax year 2006, VCE designed MTTP specifically to attract 500 families that were working and earning low wages in order that they might begin to receive additional benefits. The initiative was

part of VCE’s overall focus on building family economic success for low-wage earners.

VCE worked with numerous partners to review the locations of assistance sites in 2006 to ensure they were convenient to parts of the city with high concentrations of people living on low incomes. The project eventually settled on 16 sites, four of which served as distribution hubs for MTTP support materials. Statistics compiled after the project ended showed that 251 Edmonton residents applied for benefits, subsidies and credits through MTTP. Though only half the response rate organizers had hoped for, it was a good beginning.

Media coverage resulted in requests for MTTP materials during and after the campaign. VCE staff fielded requests from approximately 120 small- to medium-sized businesses and from several social worker and health care groups. Says VCE Executive Director Karen Gingras: “Make Tax Time Pay was a positive story all around, providing a valuable service to people who really needed it. It also proved to be a great way to introduce Vibrant Communities Edmonton to a number of new partners.”

Vibrant Communities offers numerous ways for communities to learn from one another’s experiences. This series shows how VC Trail Builders continue to improve and expand upon projects to better serve their communities.

Year two

In MTTP's second year, staff members from Canada Revenue Agency (CRA) again provided one-day training sessions for site volunteers. VCE staff members were also pleased to make connections with Edmonton's 2-1-1 community information line which helped spread the word about the program.

The Edmonton Community Foundation donated \$35,000 to the project to purchase 24 laptop computers and help pay office costs. Says MTTP Project Manager Cyndy Creighton: "Last year's evaluation clearly showed us that volunteers without tax form experience were at a disadvantage when it came to filling out paper forms. With computers, the system automatically delivers the correct page once preliminary information and form names are inputted. The sites ran more smoothly as a consequence, and with a little practice, each tax return could be completed within 20 minutes. Everyone was much happier – volunteers and clients alike."

The VCE planning team cultivated a relationship with members of a Spanish-language church who decided to set up an MTTP site for their community, both as a way to provide assistance with a specific task and as a means of directing people to other settlement programs which might be of help. The parish has entered into an agreement with Vibrant Communities Edmonton to use the MTTP laptops between tax seasons to offer English language and computer classes to the community. Feedback from this group spurred VCE to begin preparing an MTTP Newcomer Binder for immigrants and temporary foreign workers which will be distributed to three other churches, employers and organizations that serve immigrants. Says Cyndy: "Worship spaces are excellent MTTP sites because they usually

also host assistance programs like food banks and clothing exchanges for their members and others who live in the surrounding area. We see faith communities as potential partner organizations and will try to involve more of them in our work over the next year."

The 2006 tax season taught the MTTP team the importance of having two sets of volunteers available at each preparation site – one whose members are at ease with tax forms and adept at completing them, the second set who are well versed with the application details for the various benefits, subsidies and tax credits. CRA trained the first set of volunteers and VCE trained the second. VCE developed a Site Manual to help guide each site host and coordinator, including easily-photocopied pages of instructions and duties, and a week-by-week countdown of tasks. Thanks to Yvonne Footz, Government Information Librarian at the Edmonton Public Library, the MTTP binder was catalogued for circulation and a copy was sent to each library branch, accompanied by a promotional poster.

The number of filing sites increased from 16 to 21 in 2007, including a few which were set up to serve specific groups (e.g., students at NorQuest College; employees at West Edmonton Mall). The mall was the first business to partner in the tax initiative and though its high profile made it seem like an ideal spot for the 2007 MTTP campaign kickoff, its suburban location was less attractive to reporters. Startup celebrations in February were also dampened by a major snowstorm so year two media coverage was thinner than anticipated. Says Cyndy: "We learned something new at every corner. For example, to ensure employee confidentiality, the mall's MTTP site needed to be staffed by volunteers from other organizations. Three VCE

New venue, new ideas

A relationship between Vibrant Communities Edmonton and NorQuest College has developed since 2002. College President and CEO Dr. Wayne Shillington became co-chair of the Vibrant Community Edmonton Leadership Council in 2004. Says Shillington: “Our decision to partner with Vibrant Communities was an easy one because it’s a natural partnership.” NorQuest specializes in career programs as well as adult academic preparation, language training and support for students with disabilities. Shillington continues: “Much in the same way that VCE builds capacity for individuals to improve their economic standing, NorQuest builds capacity for underrepresented students to achieve academic, career and economic success.”

NorQuest student and foreign-trained economist Karina Hurtado was hired as a part-time VCE employee to provide administrative assistance. When she heard about MTTP, she realized it provided the kind of tax information she and her fellow students could really use. Says Karina: “NorQuest students come from all over the world and their language skills may not be up to the job of filling out complex tax, subsidy and benefits forms. Many also don’t realize that they may be eligible for benefits under the Canadian tax system.” VCE set up a meeting with the Coordinator of Language Training and Adult Literacy and she agreed to establish an MTTP site at the college’s Westmount campus. Karina enlisted 15 advanced ESL students to help with the project. Each one acquired valuable training and Canadian volunteer experience. Students and teachers promoted the site by making short presentations to each class on campus. Feedback from the ESL students who used the NorQuest MTTP location has been excellent and the college has expressed an interest in hosting a site again next year.

Karina Hurtado is now a full-time VCE employee and two other NorQuest students – a university professor from Colombia and a journalist from China – have volunteered to translate MTTP and other financial literacy documents into Spanish and Chinese, respectively. Says Karina: “Thanks to the support of college staff members, one little idea has opened other areas where VCE and the college can collaborate.”

staff people looked after that location and we all gained first-hand experience with how the project sites actually function and with how it feels to be an MTTP volunteer.”

Areas for future work

VCE staff continue to look for more ways to increase awareness of MTTP among low-

income residents. Says VCE Executive Director Karen Gingras: “We learned from Alberta Employment, Immigration and Industry that 47,856 families in the Capital Health Region [the greater Edmonton area] are eligible to receive the Alberta Child Health Benefit. With uptake currently at 22.5 percent, we have a hefty target for all of our MTTP promotion work. We also need to find more volunteers who can help out during the day, but as word of the project

spreads, we believe we will attract more people to fill our rosters. We are hopeful that next year's efforts to advertize MTTP through the school system will be a more effective way of reaching low-income families."

VCE is in the process of conducting an evaluation of this year's MTTP campaign. Organizers anticipate using results from that report to help build even greater program awareness in tax year 2008.

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Reference

Makhoul, A. (2006). *Vibrant Communities Edmonton's Make Tax Time Pay Campaign*. Ottawa: Caledon Institute of Social Policy, February.

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