



## CalEITC4Me PARTNER TOOLKIT

***We look forward to working with your office to maximize the benefits of CalEITC for working families in your district.*** Together, we will work to ensure that every eligible working household – an estimated 600,000 in California – claim refunds they've earned, and that more families file for the federal EITC. The economic impact of this program is profound, adding hundreds of millions of dollars to the state's economy in income, business sales, new jobs, and tax revenue.

To ensure a coordinated, amplified effort, we have created an easy-to-use toolkit:

- 1) **About CalEITC4Me**
- 2) **Sample News Release**
- 3) **EITC Fact Sheet**
- 4) **Sample Social Media**
- 5) **Sample PSA Scripts**
- 6) **Website Button Link to CalEITC4me.org**

For more information, or to get involved contact:

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## ABOUT CalEITC4Me

**Please join us as a partner and help spread the word about the Earned Income Tax Credit!**

**CalEITC4Me** is a statewide outreach campaign that serves as a one-stop shop to encourage lower income working Californians to claim the new state earned income tax credit (CalEITC). Many low-income working Californians struggle to provide for their families. EITC provides extra cash for basic necessities - education, food and housing – providing an economic lifeline for struggling working families.

CalEITC4Me's goals are to ensure that every eligible working household – an estimated 600,000 – claim refunds they've earned, and that more Californians file for the federal EITC. The majority of Californians eligible for the EITC are single, women and working part time. The economic impact of the state EITC alone is profound, adding hundreds of millions of dollars to the state's economy in income, business sales, new jobs, and tax revenue.

Add to that the billions of federal EITC available to working Californians, \$1.8 billion of which goes unclaimed each year.

In 2016, its first year, CalEITC4me efforts resulted in nearly 30,000 free tax preparations and made 118,000 referrals to free local VITA tax preparation centers. More than 400,000 low-income working Californians claimed nearly \$200 million dollars in refunds. In addition to the direct benefits to families, those dollars were reinvested in local economies.

In its second year, CalEITC4me will reach even more eligible households through expanded multi-lingual education and grassroots outreach, enhanced web tools, free tax preparation services and partners that are well-positioned to spread the word.

This comprehensive statewide campaign is an initiative of Golden State Opportunity <http://goldenstateopportunity.org/> which works to improve the lives of working Californians through a program of research, analysis, public information and education – reaching Californians community-by-community, where they live, work, learn, worship, shop and tweet. Core campaign elements include:



## Community Partners

Neighborhoods, and the people and organizations within them, are at the center of our effort. CalEITC4Me is working on a daily basis hand-in-hand with trusted community partners who serve and interact with those most likely to be eligible. Campaign activities include distribution of helpful multi-lingual materials, free tax filing events, neighborhood resource centers, extended hours at free tax prep sites, and on-the-ground outreach including door-to-door campaigns.

## CalEITC4Me.org

We've created a one-stop shop headquarters online. Our multi-lingual website is a go-to hub of information, providing up-to-date resources, content, tool kits, fact sheets, videos, social media campaigns and other user-friendly resources for partners, community organizations and filers throughout the tax season.

Our online multi-lingual CalEITC4Me **Calculator** allows individuals to determine their eligibility for the state and federal EITC, including their potential cash-back refund in a few easy steps. The calculator, created for California by Inuit Financial Freedom Foundation, links to the **Free Tax Prep Finder** tool, which connects families to free tax preparation services in their neighborhoods. In addition, the CalEITC4Me Interactive **Heat Map** helps nonprofits, government agencies and others identify key regions of eligible filers by ZIP code and other searchable criteria to better target education and outreach efforts on the ground.

## A Strong, Diverse Coalition

This statewide campaign brings together multiple state agencies and a broad coalition of local and statewide community, faith, civic, education, workforce, business, and media leaders committed to fostering economic opportunity and financial security for Californians barely making ends meet. It was initiated by Golden State Opportunity, a new foundation created by California entrepreneur Joseph N. Sanberg.

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## SAMPLE NEWS RELEASE

For Immediate Release

Contact: XXX

**(XXX) Joins CalEITC4me to Raise Awareness of**

**Hundreds of Millions in Cash-Back Tax Refunds for Working Californians**

(City) – (Organization/Name) has partnered with [CalEITC4Me](#), the statewide education and outreach campaign to get the word out to more than 600,000 eligible low-income working Californians about the state’s earned income tax credit (CalEITC) program. In 2017, the campaign aims to maximize claims for state and federal earned income tax credits, which provide an economic boost for struggling working families and communities.

EITC’s economic impact is profound. In its first year, CalEITC cash-back refunds to low-income working Californians totaled nearly \$200 million. Add to that the billions of federal EITC available to working Californians, \$1.8 billion of which goes unclaimed each year.

(Insert county data from **Fact Sheet** below) “In XXX County, XXX million working families are eligible for CalEITC. This translates to \$XXX million in cash-back refunds that families can spend on food, education, housing and other necessities,” said XXXX. “Businesses also benefit when working families have extra income to spend in their communities.”

CalEITC4me.org is a one-stop shop for filers and community organizations throughout the year. The multilingual website provides eligibility information, resources, tool kits, fact sheets, videos, social media and other user-friendly resources:

- The multilingual (English, Spanish, Mandarin) **Calculator** allows individuals and partners to quickly assess eligibility, including the approximate amount of their potential refund. <http://caleitc4me.org/earn-it/>.
- The **Free Tax Prep Finder** is a map that connects families to free tax preparation services in their neighborhoods, featuring approximately 1,400 VITA sites. Individuals can go online and enter their address or zip code and find this information, which includes addresses, contact information, days and hours services are available, languages offered and whether an appointment can be made. <http://caleitc4me.org/get-it/>.



- The CalEITC4Me Interactive **Heat Map** helps the campaign, non-profits, agencies and others identify key regions of eligible filers by ZIP code and other searchable criteria to maximize participation.  
<http://caleitc4me.org/caleitc-heatmap/>

Californians must file their taxes by April 18 to qualify for the California Earned Income Tax Credit.

*ABOUT CalEITC4Me.org*

*CalEITC4Me is statewide outreach and education campaign to spread awareness of the state and federal Earned Income Tax Credit and put more money into the hands of hard-working Californians. CalEITC4ME, an initiative of Golden State Opportunity, is a one-stop, multilingual online hub of information and interactive resources. To learn more about CalEITC4Me, visit [CalEITC4Me.org](http://CalEITC4Me.org). To learn more about Golden State Opportunity, the organization focused on creating economic security for everyone, visit*

*[goldenstateopportunity.org](http://goldenstateopportunity.org)*

*[@CalEITC4Me](https://www.facebook.com/CalEITC4Me)*

*[Facebook.com/CalEITC4Me](https://www.facebook.com/CalEITC4Me)*

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## EITC FACT SHEET



### Why the EITC is so important:

- The EITC is one of the most effective tools in America to lift families out of poverty
- Last year, the Cal EITC put almost \$200 Million directly into the hands of nearly 400,000 working Californians for the first time
- The Federal EITC delivers over \$7 Billion to low-income Californians every year
- Research shows children whose families receive a boost in income from EITC perform better in school and have better health.
- The EITC enjoys wide bipartisan support for encouraging work and continued employment
- Families use the EITC to buy shoes, put food on the table, pay bills, and cover basic needs for their kids
- Governor Brown described the CalEITC as one of his most important achievements

### Why EITC Outreach and Education Matters:

- Every year California leaves \$2 Billion of unclaimed EITC money on the table
- Research suggests outreach around state level EITC's increase uptake of the Federal EITC.
- About one-third of the EITC eligible population turns over each year
- Workers move into and out of eligibility based on changes in their marital, parental and financial status
- Three out of five who receive the credit use it temporarily, for one or two years.
- You must claim the credit to receive it. Over 50,000 working people filed California taxes last year and failed to claim the credit
- Many people who qualify for the credit and are eligible for up to \$6,000 fail to simply file taxes because they make below the required income threshold



### Why CalEITC4me:

CalEITC4me is the public-private partner with the State of California to engage Californians eligible for the State and Federal Earned Income Tax Credit.

The CalEITC4me campaign works to reach people where they live, eat, work, worship and shop to help them access their money, and create security for their lives.

### Top Ten California Counties in terms of CalEITC eligibility:

Listing reflects the number of households eligible and estimated CalEITC cash-back refunds available (according to the Franchise Tax Board). We can provide data for other counties or by District upon request.

#### **Fresno County**

25,000 eligible, \$13 million available

#### **Kern County**

17,500 eligible, \$9 million available

#### **Los Angeles County**

More than 100,000 eligible, more than \$50 million available

#### **Orange County**

35,000 eligible, \$18 million available

#### **Riverside County**

35,000 eligible, \$18 million available

#### **Sacramento County**

25,000 eligible, \$13 million available

#### **San Bernardino County**

45,000 eligible, \$24 million available

#### **San Diego County**

45,000 eligible, \$24 million available

#### **San Joaquin County**

12,500 eligible, \$6.5 million available



## SAMPLE SOCIAL MEDIA POSTS

- 1) We are proud to partner with @CalEITC4Me to educate Californians on the #CalEITC. For more information, visit CalEITC4Me.org



- 2) Get your #EITC cash back refund this tax season. Follow @CalEITC4Me to learn how.



- 3) Join us and follow @CalEITC4Me! They will provide you with all the resources you need to claim #CalEITC on your 2016 CA tax return.



- 4) Think what your family could with your EITC cash back refund. Visit CalEITC4Me.org to find out if you are eligible.





## CalEITC4Me SAMPLE PSAs

1.)

The California earned income tax credit – CalEITC – is making hundreds of millions of dollars available for eligible working Californians this tax season. That’s cash back that you’ve earned!

You could be eligible for a \$6,000 dollar cash-back refund and can even file your taxes for free tax preparation site in your neighborhood.

Text “CASH” to (760) 970-8396 to find out if up to \$6,000 is waiting for you!

Visit CalEITC4Me.org to learn more

Don't wait. Check it out. CalEITC4Me.org.

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2.)

If you’re a working Californian making up to \$54,000 per year, you could get a big cash refund at tax time.

CalEITC is a new program that gives money back to working families and individuals. But you need to file your taxes by April 18 to get it!

Text “CASH” to (760) 970-8396 to find out if up to \$6,000 is waiting for you!

You can learn more by visiting CalEITC4Me.org today to find out how much cash back you can get, and how to file your taxes for FREE.

Don't let it pass you by! Get your hard-earned money today.

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3.)

If you make up to \$54,000 a year there’s a State program to put hundreds of million back into the pockets of working Californians like YOU. It’s called CalEITC and it’s easy to claim.

Visit CalEITC4Me.org today to find out, on-the-spot, if you’re eligible for a cash refund up to \$6,000 this tax season and get FREE assistance filing your taxes. **(insert free tax event info if applicable)**

Or text “CASH” to (760) 970-8396 to find out if you qualify!

Don't wait. Check it out. CalEITC4Me.org.



## WEBSITE BUTTON TO LINK TO CALEITC4ME.ORG

Put one of our CalEITC buttons on your website to link to us! Choose a size:  
[93x69](#) or [234x60](#)



For more information, or to get involved contact:

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