

Panel on Innovation: San Antonio Coalition for Family Economic Progress

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EITC & Tax Preparation
Achieving Scale, Sustainability and Impact
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Description of Innovation

- ▣ Shared leadership
- ▣ Coalition leadership comprised of five diverse organizations
- ▣ External supporters include:
 - Other public entities
 - Non-profits
 - Financial institutions
 - Community organizing groups

Coalition Partners

- ❑ United Way
 - ❑ Advertising, funding, and 211-hotline
- ❑ Catholic Charities
 - ❑ Volunteer recruitment, personnel and logistics
- ❑ Annie E. Casey Foundation
 - ❑ Site management, grant maker and funder
- ❑ City of San Antonio, Department of Community Initiatives
 - ❑ Site management, grant maker and funder, technical assistance, facilities
- ❑ IRS
 - ❑ Software, technical assistance

External Supporters

- ❑ Financial Institutions
 - ❑ Grant making, banking products, loan refinancing
 - ❑ Competition to sponsor sites
- ❑ Local foundations
 - ❑ Grant making, volunteers, linkages
- ❑ Electronic and print media
 - ❑ Led by City's Public Information Office
 - ❑ Weekly radio and print stories
 - ❑ Spanish language outreach

Innovation Goals

Challenges:

- ▣ Low use of the EITC
- ▣ High use of paid tax preparers and RALs
- ▣ High number of unbanked taxpayers

Goals:

- ▣ Ensure taxpayers receive the maximum credits
- ▣ Introduce them to mainstream financial services
- ▣ Connect them with multi-benefit services

Implementation Lessons

- ▣ Coalitions take time, patience and constant nurturing
- ▣ Keep steering committee small but find vehicles for greater inclusion
- ▣ Clearly define roles and responsibilities
- ▣ Remain flexible and adjust on the fly
- ▣ Always start with the future in mind

Potential for Scale

- ▣ Scale might range from 50,000-60,000 returns or 33% of eligible EITC filers
- ▣ Create greater opportunities for bundling services
- ▣ Change service delivery and open door for new funding partners
- ▣ Allow for deeper embedding of Family Economic Success principles
- ▣ Serves as a platform for multiple financial product

Implementing at Scale

- ▣ Significantly expands service delivery opportunities based on the number of participants and their financial buying power
- ▣ VITA co-located at:
 - Municipal and County Courts
 - Hospitals
 - Utility customer service offices
 - Financial institutions
 - Investment clubs or cooperatives
 - Public Libraries