

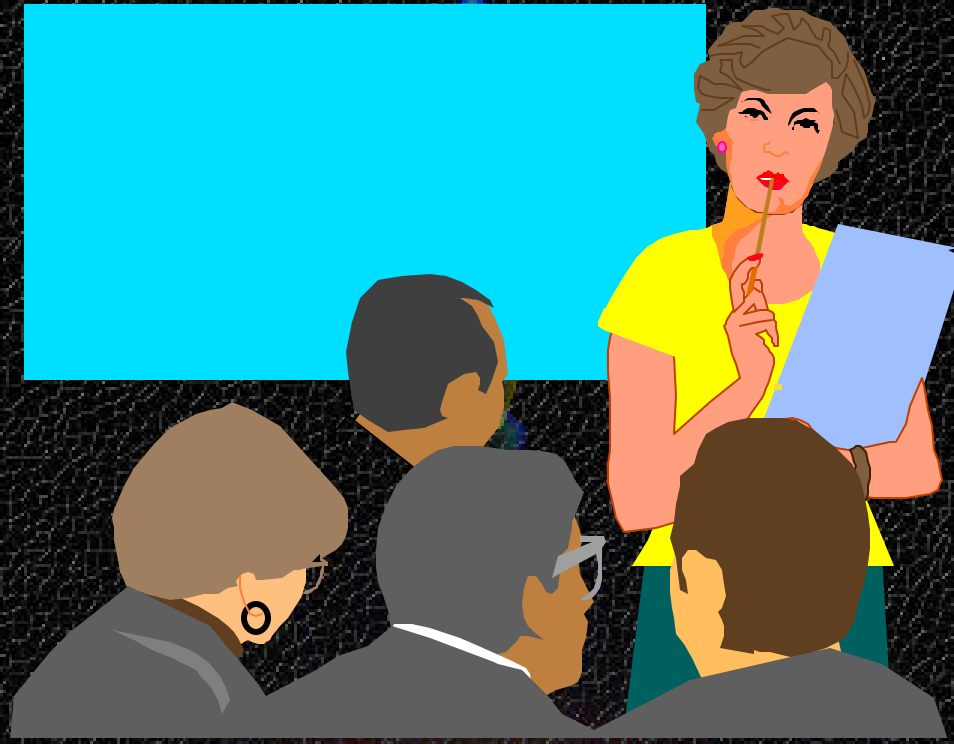
# DEVELOPMENT OF AN EFFECTIVE EITC OUTREACH STRATEGY

Presented at the 2002 Research Conference

JUNE

2002

# OUTREACH MODEL



**PARTNER**



# BUSINESS CASE



- LOCALIZED MARKET SNAPSHOTS
- SUMMARY DATA
  - ZIP CODE
  - SET OF ZIP CODES
  - CITIES
  - COUNTIES
  - STATES
  - TERRITORIES
  - AREAS

# APPROACH

**IDENTIFY NEEDS**

**FOCUS EDUCATION**

**TARGET EDUCATION**

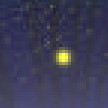
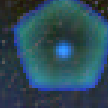
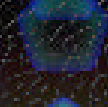
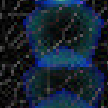
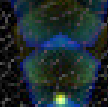
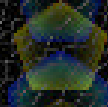
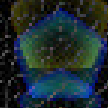
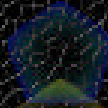
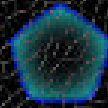
**MEASURE BASELINE**

**DELIVER EDUCATION**

**REMEASURE**



# IDENTIFY



**INFO NEEDS**

**PREFERENCES**



# TAXPAYER NEEDS

- EITC COMPLIANCE STUDY
- EITC TAXPAYER SURVEYS
- EITC TAXPAYER FOCUS GROUPS
- TAXPAYER ADVOCATE REPORT
- *WAGE & INVESTMENT SURVEY*
- *SPEC CUSTOMER SURVEY*

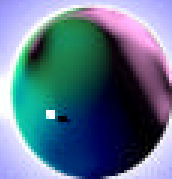


# PARTNER NEEDS

- EITC PREPARER SURVEY
- EITC PREPARER VISITS
- *SPEC PARTNER SURVEY*

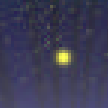
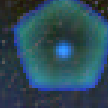
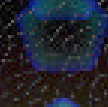
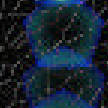
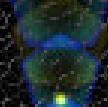
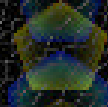
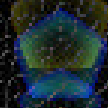
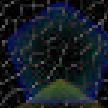
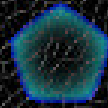
# IRS NEEDS

- ADMINISTER EITC APPROPRIATION
- COMPLIANCE
- ENSURE EITC PARTICIPATION
- BURDEN REDUCTION





# FOCUS



# EDUCATION & OUTREACH



# IRS RESEARCH

- INTERNAL RESEARCH PROJECTS
- COMPLIANCE STUDIES/TESTS
- PARTICIPATION STUDIES
- SURVEYS/FOCUS GROUPS



# EXTERNAL RESEARCH

- PARTNER- MARKETING CAMPAIGNS
- PARTNER- SURVEYS/FOCUS GROUPS
- ACADEMIC STUDIES- PARTICIPATION
- OVERSIGHT STUDIES- PROGRAM ADM

# DEVELOP MESSAGES

IRS FINDINGS

PARTNER FINDINGS

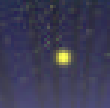
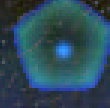
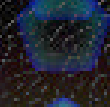
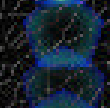
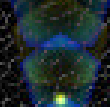
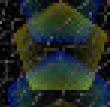
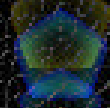
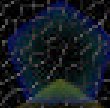
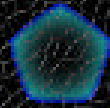
STATE FINDINGS

ACADEMIC FINDINGS

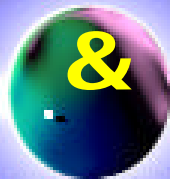




# TARGET



# EDUCATION & OUTREACH





# MESSAGE

TAXPAYER FINDINGS

PARTNER FINDINGS

IRS FINDINGS

# MEASURE



# POPULATION

TAXPAYER FINDINGS

PARTNER FINDINGS

IRS FINDINGS

# LOCATION



# COVERAGE

TAXPAYER FINDINGS

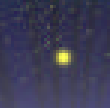
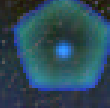
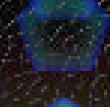
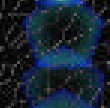
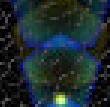
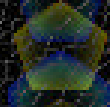
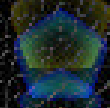
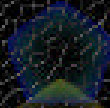
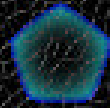
PARTNER FINDINGS

IRS FINDINGS

# ADEQUACY



# MEASURE



# EDUCATION & OUTREACH





# BALANCED MEASURES

**BUSINESS RESULTS**

**CUSTOMER SATISFACTION**

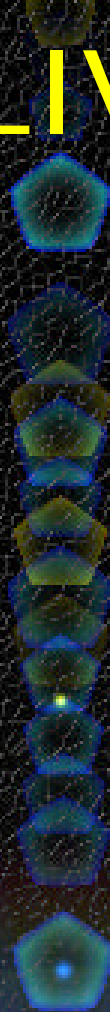
**EMPLOYEE SATISFACTION**

*PARTNER SATISFACTION*





# DELIVER



# EDUCATION & OUTREACH



# MESSAGE CHANNELS

- IRS TAXPAYER BASED PROGRAMS
- IRS PARTNER BASED PROGRAMS
- *PARTNER EVALUATION SYSTEM*



# Customer and Tax Life Cycles

Life Event   Tax Event   Potential Partners   Data Sources

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# Customer and Tax Life Cycles (cont.)

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Life Event

Tax Event

Potential Partners

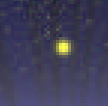
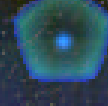
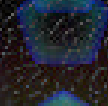
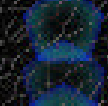
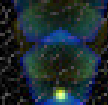
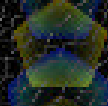
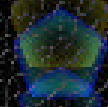
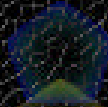
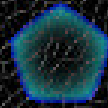
Data Sources

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# REMEASURE



EDUCATION & OUTREACH





# MEASURE

AWARENESS  
KNOWLEDGE  
USAGE  
REPORTING  
COMPLIANCE  
ACCURACY  
COMPLIANCE  
CUSTOMER  
SATISFACTION  
EMPLOYEE  
SATISFACTION

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# REMEASURE

AWARENESS  
KNOWLEDGE  
USAGE  
REPORTING  
COMPLIANCE  
ACCURACY  
COMPLIANCE  
CUSTOMER  
SATISFACTION  
EMPLOYEE  
SATISFACTION



# SYSTEMATIC APPROACH

**IDENTIFY NEEDS**

**FOCUS EDUCATION**

**TARGET EDUCATION**

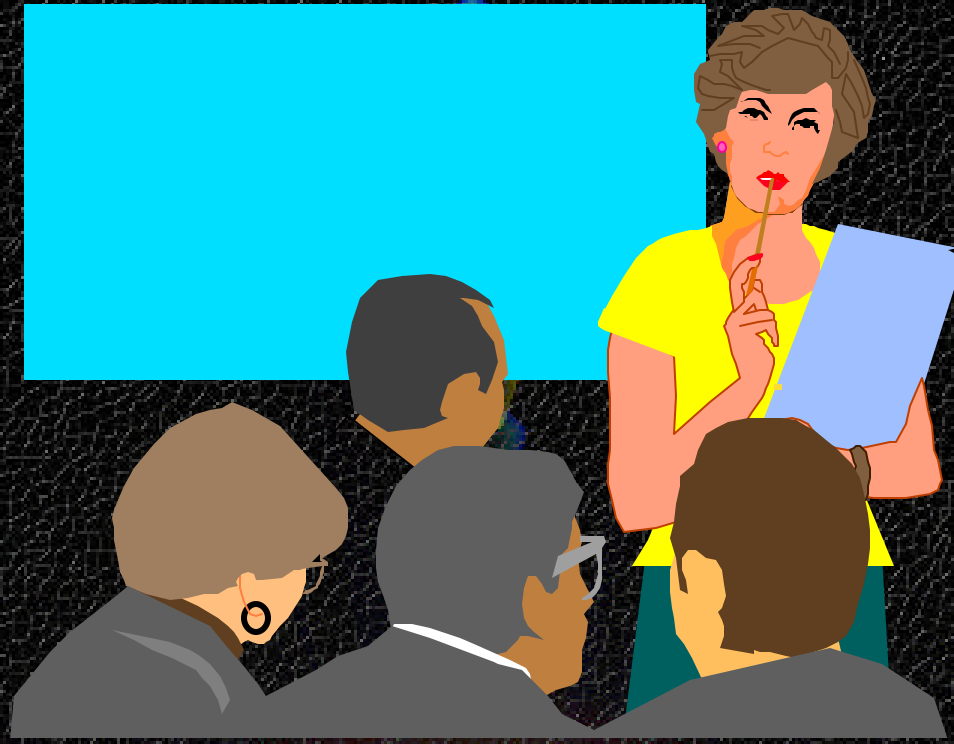
**MEASURE BASELINE**

**DELIVER EDUCATION**

**REMEASURE**



# OUTREACH MODEL



PARTNER



# LOCALIZED REPORTS

DATABASE DEMO  
UPON REQUEST



# CONTACT INFORMATION

JOSE LOPEZ  
WAGE & INVESTMENT  
CHIEF, CUSTOMER RESEARCH  
BALTIMORE/BOSTON