DEVELOPMENT OF AN EFFECTIVE EITC OUTREACH STRATEGY

Presented at the 2002 Research Conference
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
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
COVERAGE

TAXPAYER FINDINGS

PARTNER FINDINGS

IRS FINDINGS

ADEQUACY
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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<thead>
<tr>
<th>Life Event</th>
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<th>Potential Partners</th>
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REMEASURE

EDUCATION & OUTREACH
SYSTEMATIC APPROACH

- IDENTIFY NEEDS
- FOCUS EDUCATION
- TARGET EDUCATION
- MEASURE BASELINE
- DELIVER EDUCATION
- REMEASURE
OUTREACH MODEL

PARTNER
LOCALIZED REPORTS

DATABASE DEMO UPON REQUEST
CONTACT INFORMATION

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