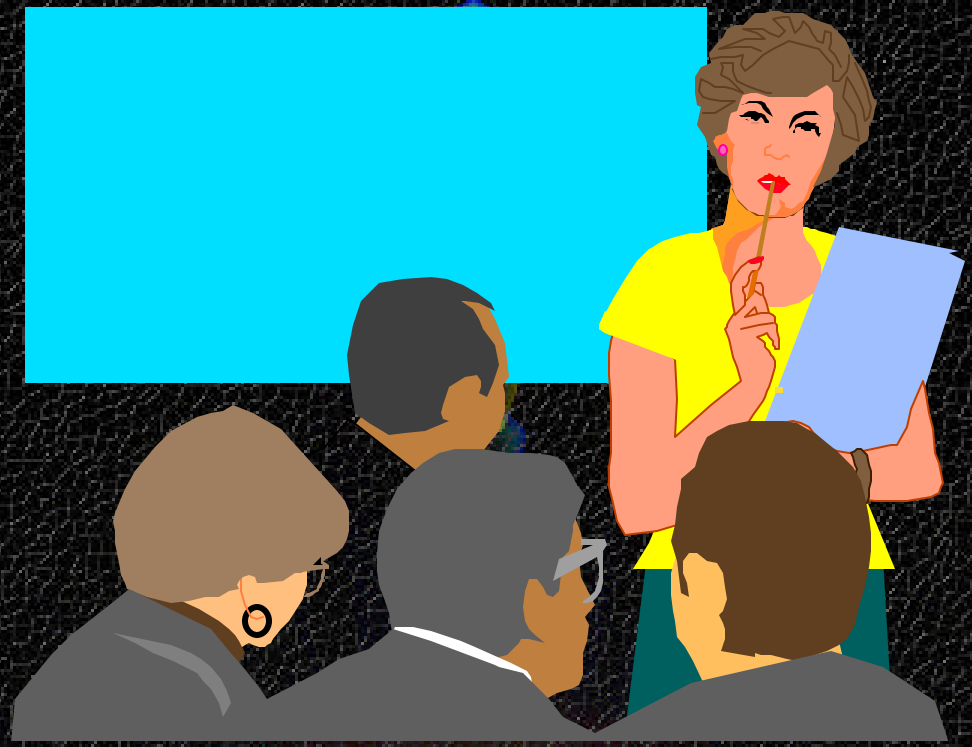
DEVELOPMENT OF AN EFFECTIVE EITC OUTREACH STRATEGY

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

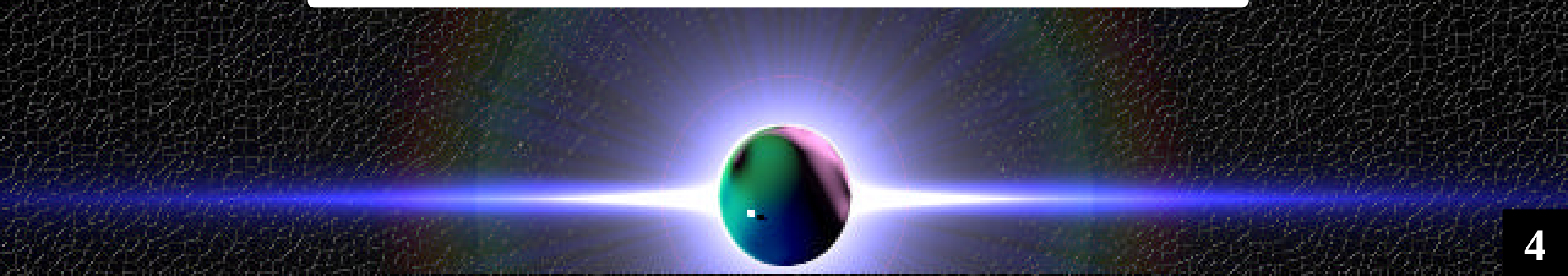
FOCUS EDUCATION

TARGET EDUCATION

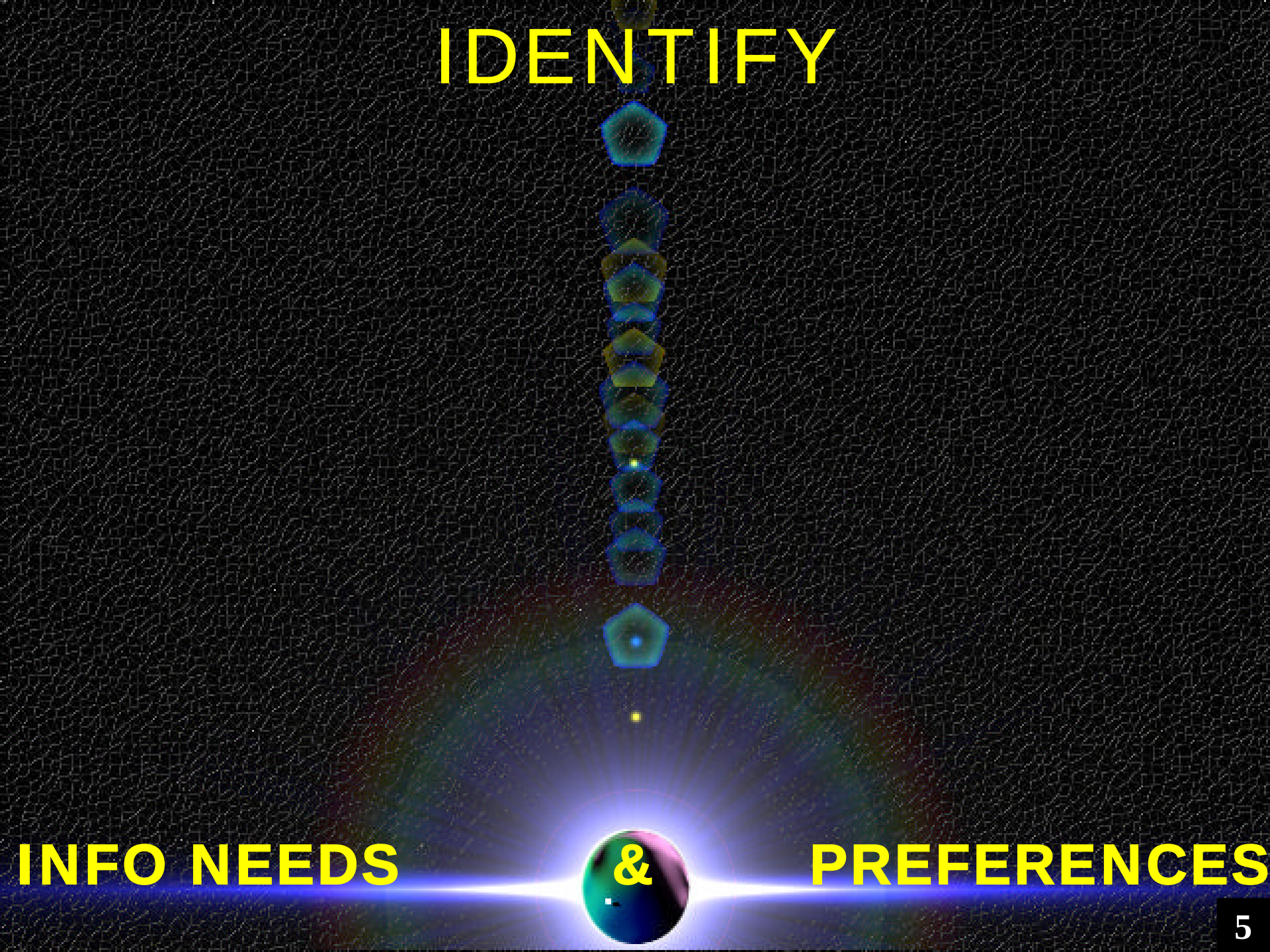
MEASURE BASELINE

DELIVER EDUCATION

REMEASURE



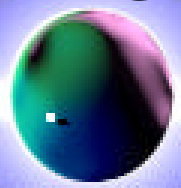
IDENTIFY



INFO NEEDS & PREFERENCES

TAXPAYER NEEDS

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



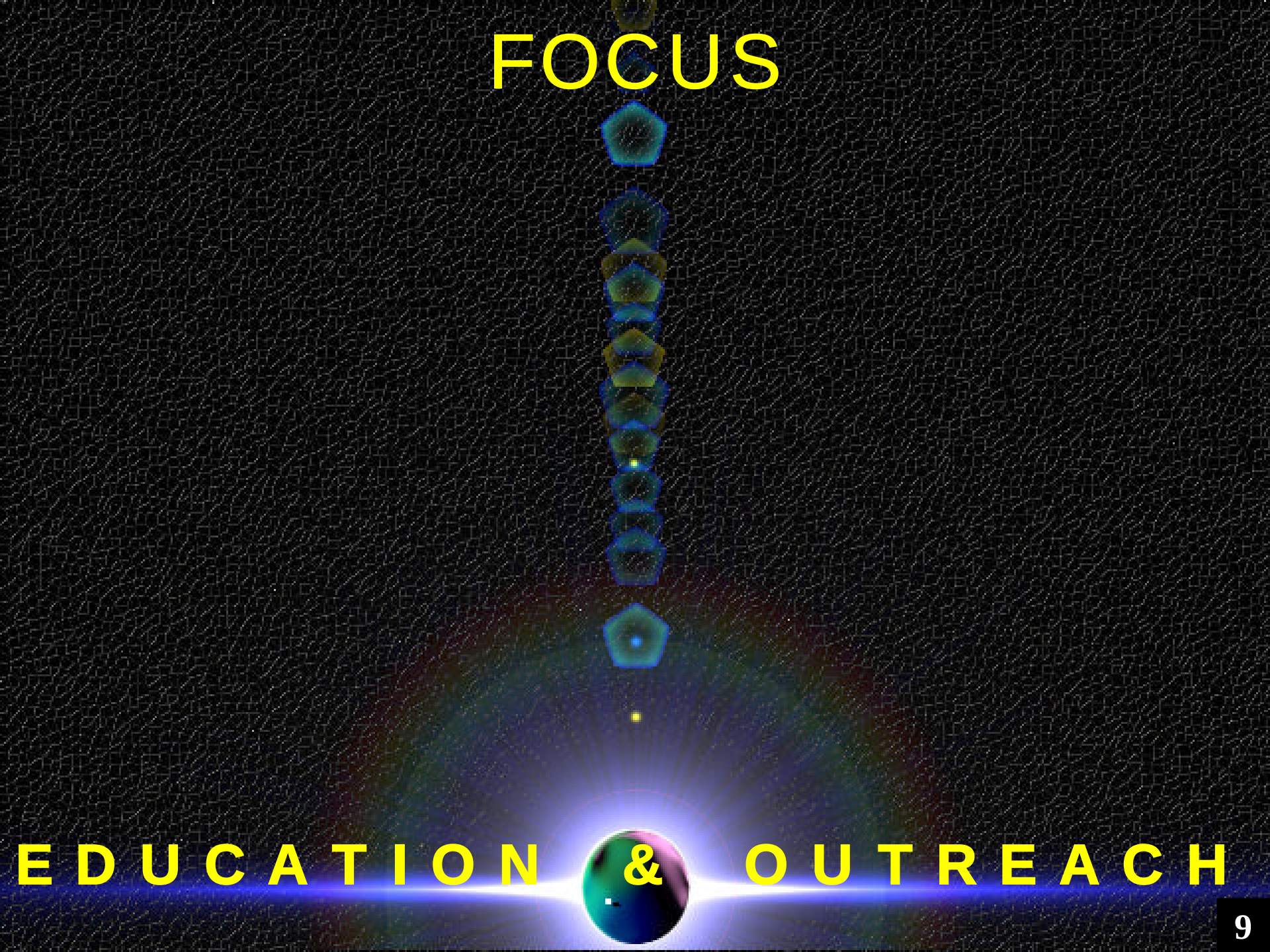
PARTNER NEEDS

- 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

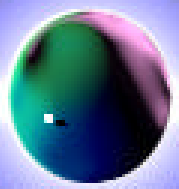
DEVELOP MESSAGES

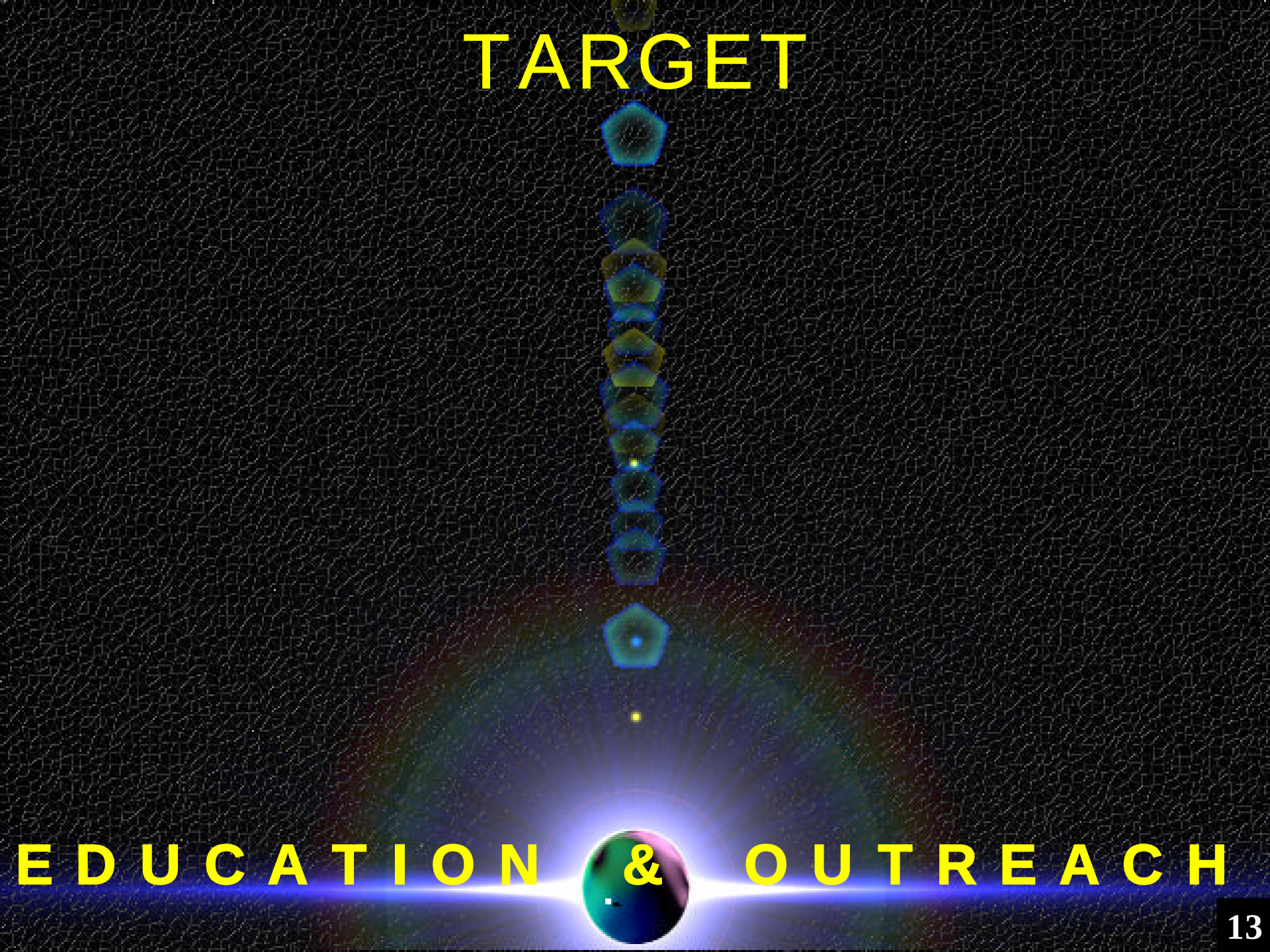
IRS FINDINGS

PARTNER FINDINGS

STATE FINDINGS

ACADEMIC FINDINGS




TARGET
EDUCATION & OUTREACH

MESSAGE

TAXPAYER FINDINGS

PARTNER FINDINGS

IRS FINDINGS

MEASURE

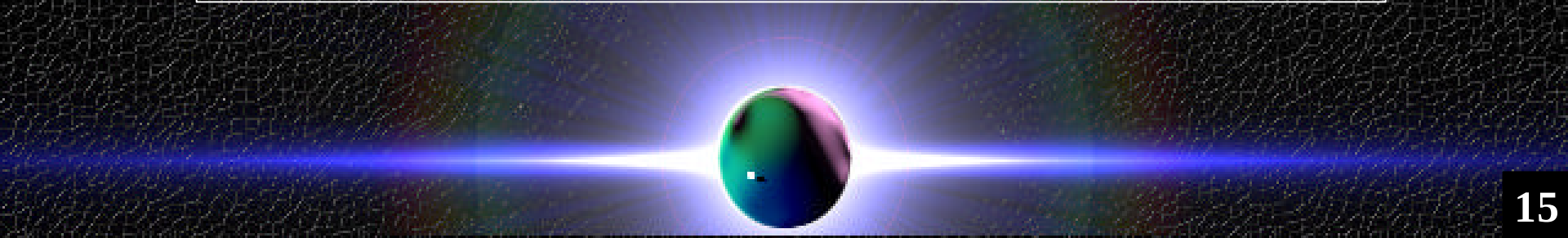
POPULATION

TAXPAYER FINDINGS

PARTNER FINDINGS

IRS FINDINGS

LOCATION



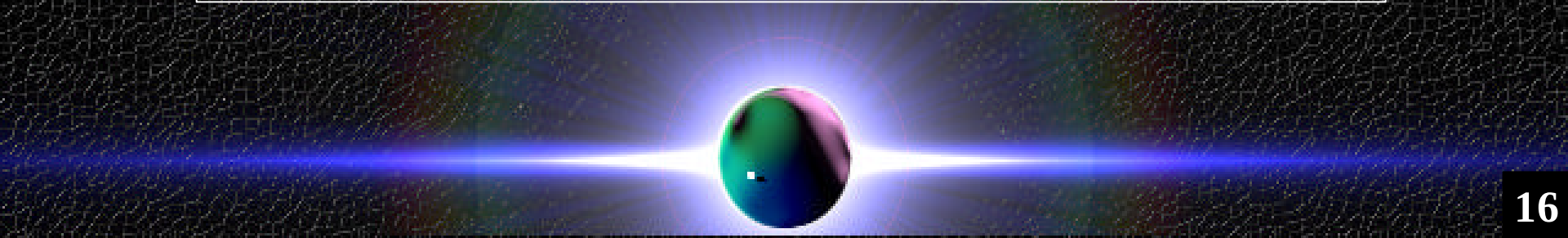
COVERAGE

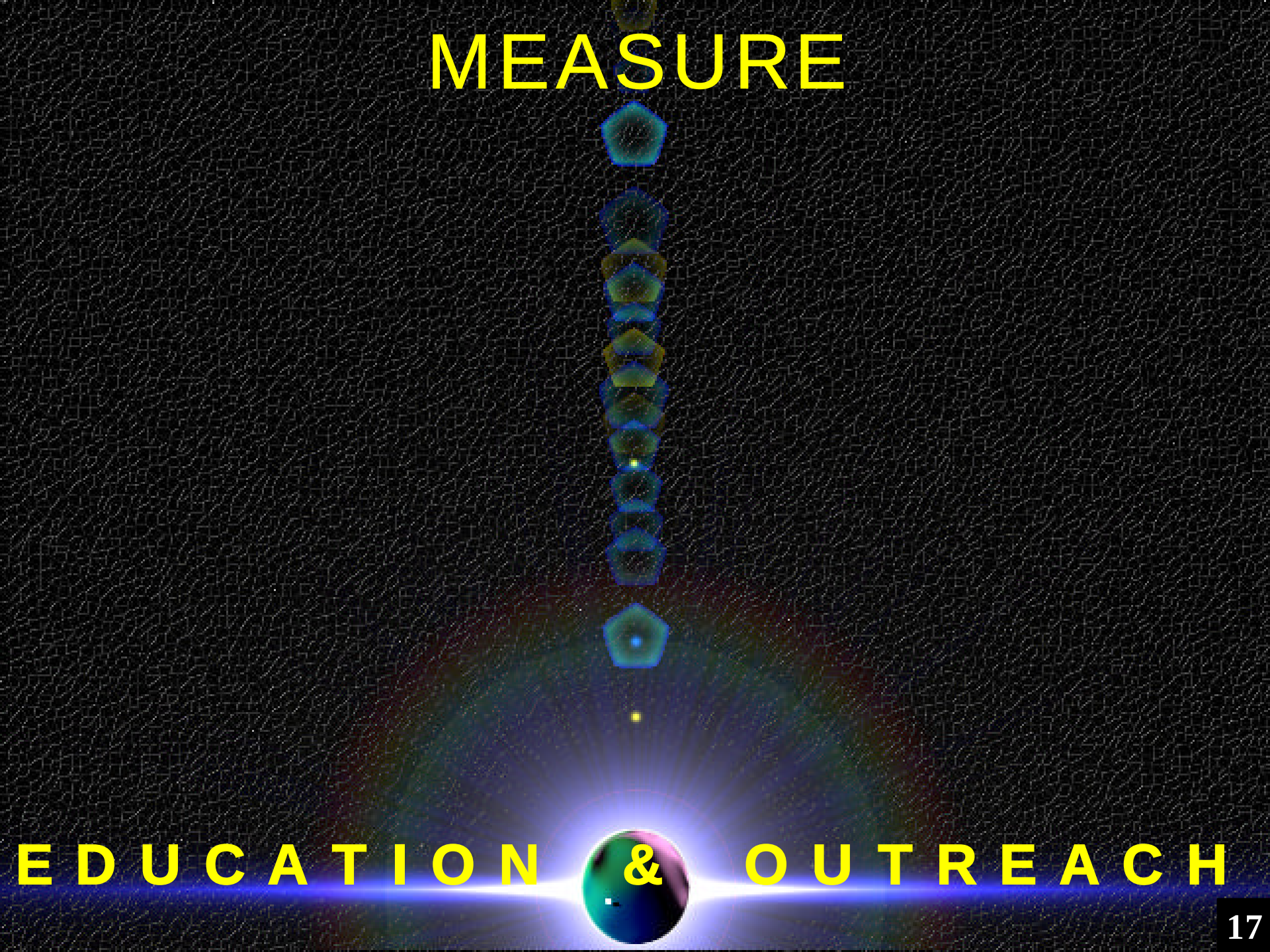
TAXPAYER FINDINGS

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

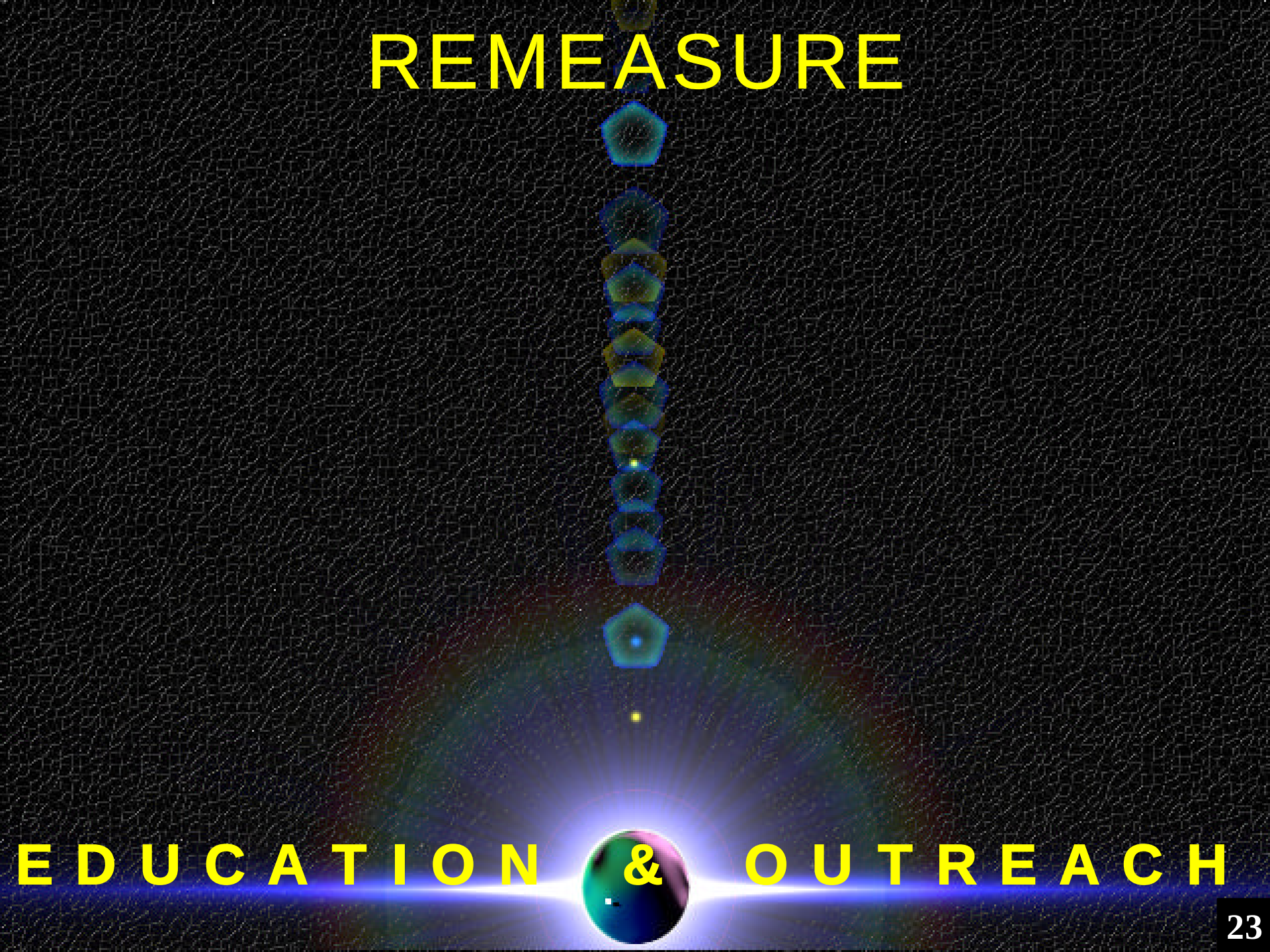
Removed by request

Customer and Tax Life Cycles (cont.)

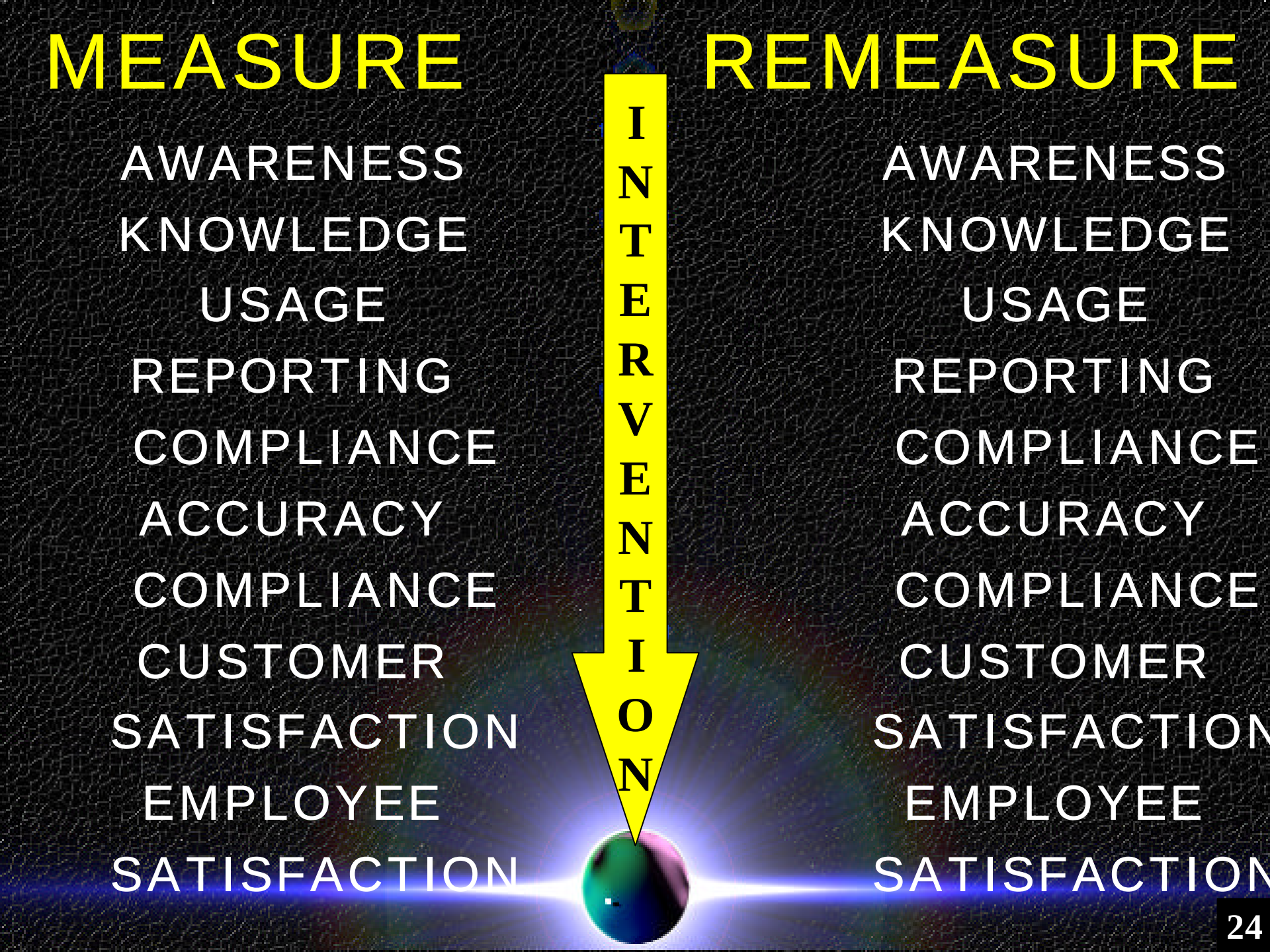
Life Event	Tax Event	Potential Partners	Data Sources

Removed by request

REMEASURE



EDUCATION & OUTREACH


MEASURE
AWARENESS
KNOWLEDGE
USAGE
REPORTING
COMPLIANCE
ACCURACY
COMPLIANCE
CUSTOMER
SATISFACTION
EMPLOYEE
SATISFACTION
INTERVENTION
REMEASURE
AWARENESS
KNOWLEDGE
USAGE
REPORTING
COMPLIANCE
ACCURACY
COMPLIANCE
CUSTOMER
SATISFACTION
EMPLOYEE
SATISFACTION

SYSTEMATIC APPROACH

IDENTIFY NEEDS

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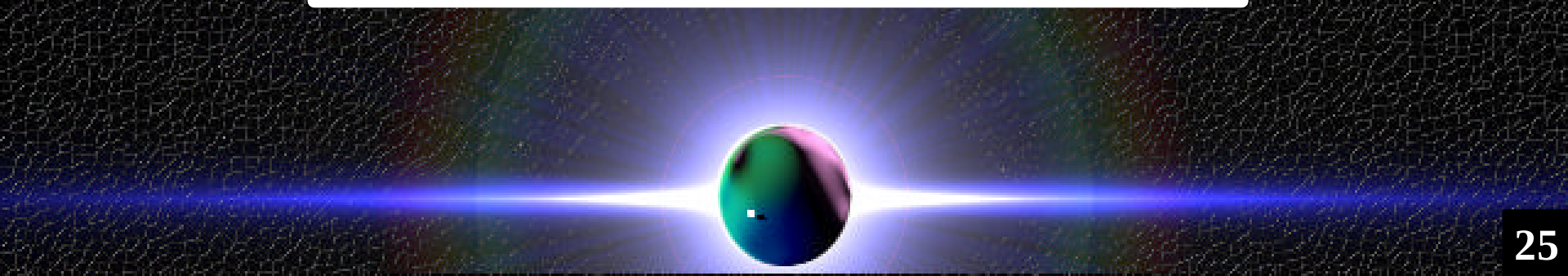
TARGET EDUCATION

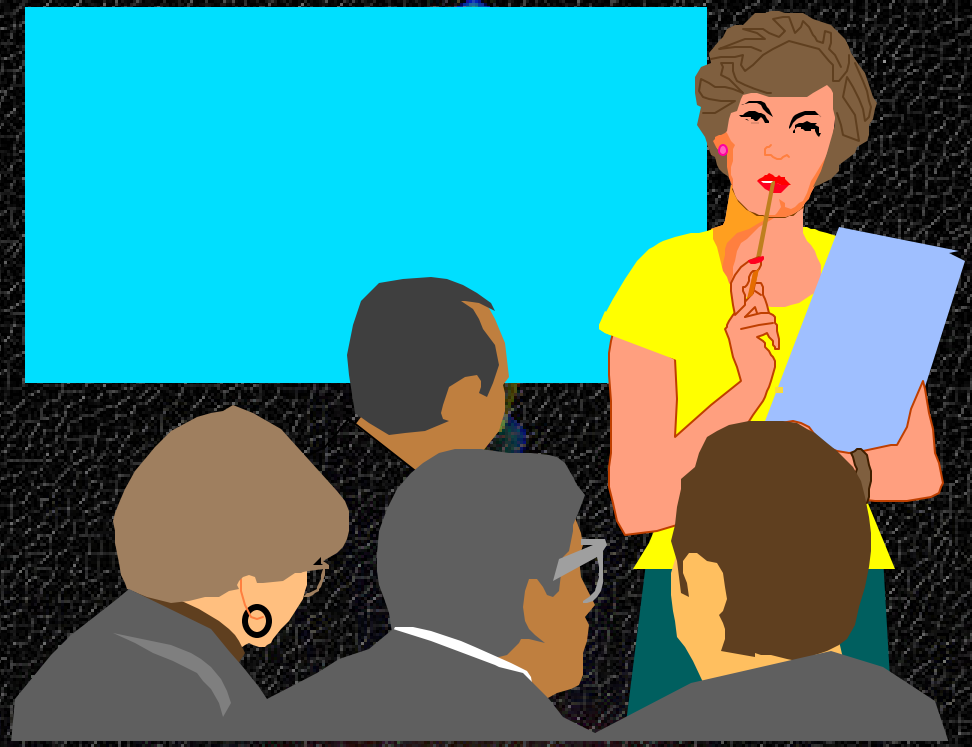
MEASURE BASELINE

DELIVER EDUCATION

REMEASURE



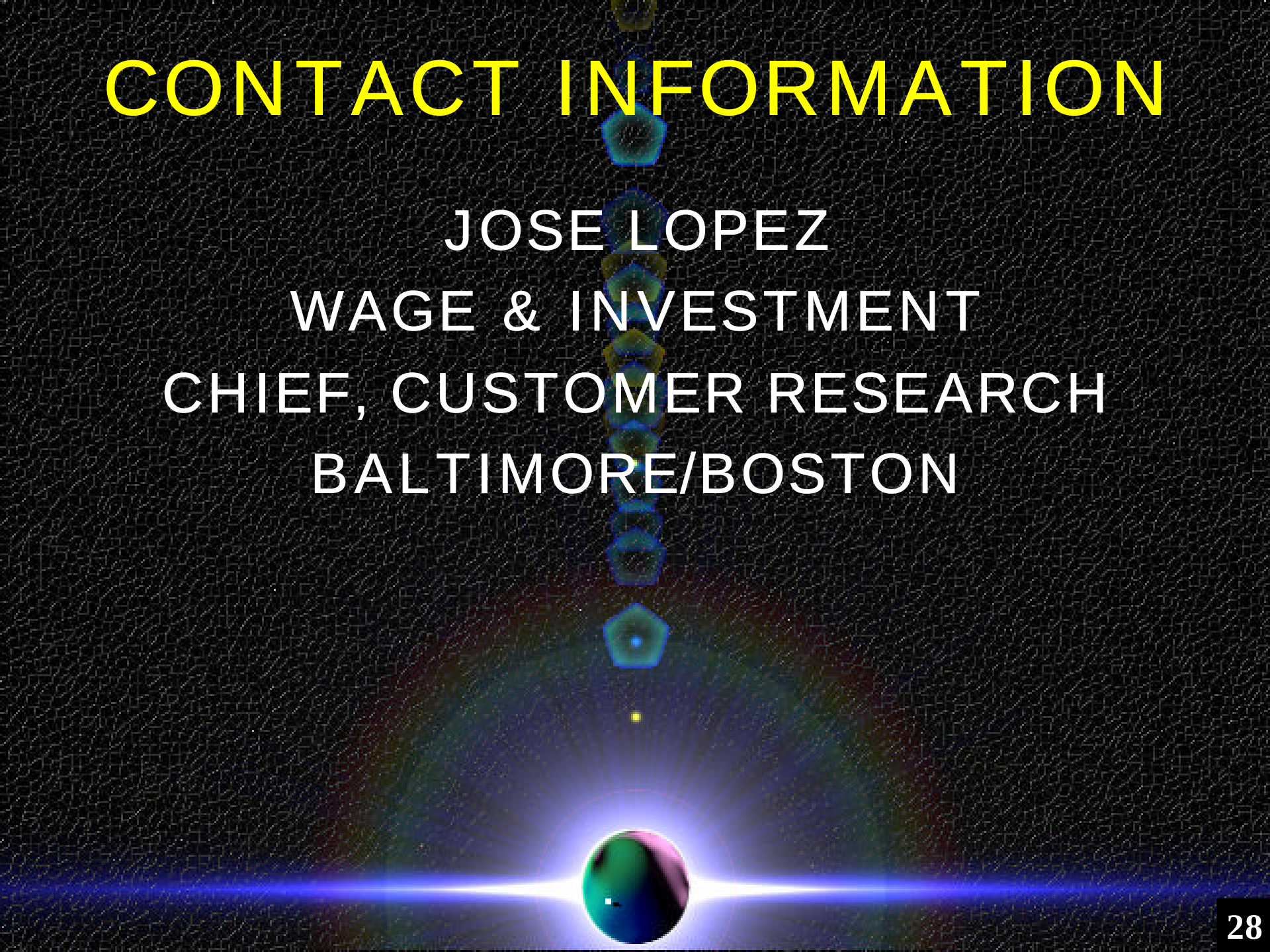
OUTREACH MODEL



PARTNER

LOCALIZED REPORTS

DATABASE DEMO
UPON REQUEST

CONTACT INFORMATION

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