

All-of-Government Approach to Increase CalEITC Utilization and Related Programs PowerPoint

Franchise Tax Board Meeting
Monday, September 9, 2024

Slide 1: All-of-Government Approach to Increase CalEITC Utilization and Related Programs

Presenters' Names: Jeanne Harriman – Finance and Executive Services Division and Roger Lackey – Filing Division
September 9, 2024

Slide 2: Outreach – It Takes a Village

- Solutions to optimize outreach
- Community effort
- Together we succeed

Slide 3: Foundation of Our Village

- FTB outreach materials support the foundation
- Annual outreach materials posted at ftb.ca.gov

Alt Text: Examples of our Spanish, Chinese, Vietnamese and Korean outreach materials are shown.

Slide 4: Establishing the Pillars of Our Village

- Coordinate and compliment outreach activities across the state with several established stakeholder groups
- Engage partners from state, federal, local, and nonprofit advocacy groups
- The Statewide Interagency Taskforce Key – Reducing Poverty Workgroup
- The Statewide Outreach Advisory Roundtable (SOAR)

Slide 5: How Our Village Engages and Works Together

- Statutory Notifications
 - California statutes require employers and public assistance programs to provide information on anti-poverty tax credits and free filing options
 - Likely to be the most successful outreach effort with the least costs
- Grants
 - California funds grants annually for local community-based organizations to allow for local outreach to community members

Slide 6: How Our Village Engages and Works Together (Continued)

- Targeted Outreach

- FTB partners with CalFresh to incorporate outreach materials into food boxes and to display at food bank sites
- Across the Programs, Referrals
 - Benefits Recommender program

Alt Text: The CalFresh Food logo and a Benefits Recommender web graphic is shown.

Slide 7: It Takes a Village

Together we have succeeded where each one of us alone would have been less effective.

Helping Californians!

Slide 8: Direct File/CalFile Status Update

- Confirmed California's continued participation with the IRS
- Project Planning and Timeline Complete
 - 2025 Filing Season (2024 Tax Year) - IRS will send California taxpayers to FTB's CalFile webpage to securely and conveniently file their CA return for free.
 - 2025 Filing Season Marketing Plan will highlight Direct File/CalFile and the opportunity for Californians to file for free.
 - 2026 Filing Season (2025 Tax Year) - Our enhanced CalFile will be released providing an integrated handoff from the IRS Direct File.

Slide 9: Questions?

Slide 10: Public Comment