National Webinar:

Promoting Health Equity Through Economic Mobility

February 27, 2024
2:00 – 3:00 PM Eastern Time

@HealthyAmerica1  @BPC_Bipartisan
 tfah.org  bipartisanpolicy.org
Closed Captioning

To see real time captioning:

1. At the bottom of your screen, click to open More
2. Click Closed Caption
ASL Interpreting

To see real time captioning:

1. At the bottom of your screen, click Interpretation

2. Select American Sign Language
Q&A Feature

1. At the bottom of your screen, click to open the Q&A panel

2. Type your question in the Q&A box

3. Hit Enter
Moderator

Tekisha Dwan Everette, Ph.D., MPA, MPH, CPH
Executive Vice President
Trust for America’s Health

tfah.org
Agenda

Welcome and Overview

Presentations from Panelists

Questions and Answers

Closing
Welcome to Our Panelists

Rachel Snyderman
Director, Economic Policy Program
Bipartisan Policy Center

Isabel Dickson, MPH
Economic Mobility Program Manager
Colorado Department of Public Health and Environment

Leandra Lacy, MPH, CHES
Training and Technical Assistance Manager
Urban Institute
Rachel Snyderman
Director, Economic Policy Program
Bipartisan Policy Center
bipartisanpolicy.org
Economic Mobility and the Federal Policy Landscape

Rachel Snyderman
TFAH: Promoting Health Equity through Economic Mobility Webinar
February 27, 2024
Will today’s children be economically better off than their parents?
Economic Mobility & Tax Policy

- **Child Tax Credit (CTC):** Helps parents offset costs of raising children
- **Earned Income Tax Credit (EITC):** Raises after-tax income for low-income workers and incentivizes increased earnings
- **Child and Dependent Care Tax Credit (CDCTC):** Helps parents’ offset a portion of child or dependent care expenses
- **Employer Provided Child Care Credit (45F):** Incentivizes businesses to provide child care for their employees
- **Employer Credit for Paid Family and Medical Leave (45S):** Incentivizes businesses to provide paid family and medical leave benefits to their employees
Federal Policy Landscape

• Aftermath of COVID-19 temporary policies
• Bipartisan House and Senate Paid Family Leave Working Groups
• Current bipartisan tax agreement
• Paid Family Leave Medical Extension and Enhancement Act

• Tax Cuts and Jobs Act of 2017 expirations in 2025
Isabel Dickson, MPH
Economic Mobility Program Manager
Colorado Department of Public Health and Environment

cdphe.colorado.gov
ECONOMIC MOBILITY AS A PREVENTION STRATEGY

Promoting Health Equity Through Economic Opportunity
Trust for America’s Health / Bipartisan Policy Center

Isabel Dickson, Economic Mobility Program Manager
Colorado Department of Public Health and Environment
February 27, 2024
ECONOMIC NEED IN COLORADO COMMUNITIES

Inflation, Housing Costs and the Cost of Living

- In November 2023, average CO household spent $1,206/mo more than before the pandemic due to inflation¹.
- Housing costs are increasingly high - median rent in Jan 2024 = $2,178, median house cost $579k.
- Colorado’s overall child poverty rate: 11%²
- Economic need is tied to poorer health & educational outcomes, and increased involvement with the child welfare system.
- Families with children with special health care needs face greater economic challenges due to leaving the workforce and cost of services

¹https://commonsenseinstituteco.org/inflation-november-2023/
²PRB analysis of data from the U.S. Census Bureau, Census Supplementary Survey & American Community Survey table B17001.
WHY ECONOMIC MOBILITY?

1. Research has confirmed the relationship between lower incomes and worse health.
2. Public health has the networks

The Role of Public Health

- Working through existing public health, human services and early childhood networks and coalitions to support financial well-being
- Describing the relationship between economic status and health outcomes
- Gathering and sharing data, research and recommendations
- Compiling, creating and sharing resources and tools
- Learning from partners already doing this work
Colorado’s Journey
- Backbone funding: Title V Maternal and Child Health
  - Needs assessment
  - Community voice
- Foundation seed funding - Gary Community Investments
- Federal funding: DOL and ARP

Getting Started
- Piloting low-cost, low-time strategies
- Referral to economic mobility information and programs through partners
- Messaging: sharing data, making the case
ECONOMIC MOBILITY STRATEGY EXAMPLES

- Tax credit promotion
- Paid family and medical leave
- Energy assistance programs
- Student loan repayment
- Banking services such as Bank On
- Benefits enrollment platforms
- Medicaid re-enrollment & the health insurance marketplace
- Reimbursement for caregiving for families with children with special health needs
WHY DO TAX CREDITS MATTER?

Research shows refundable tax credits increase financial well-being and improve health outcomes, including:

- Reduced infant mortality and low birth weight
- Reduced child maltreatment
- Higher breastfeeding rates
- Improved health outcomes across the lifecourse and across generations
- Improved educational and earnings outcomes


THE POWER OF REFUNDABLE CREDITS

- Earned Income Tax Credit (EITC): worth up to $7,430 for tax year 2023 with a 50% state match.
- Child Tax Credit (CTC): $2,000 per child (up to $1,600 refundable).
- TABOR will return $800/$1600 to most Colorado adults in the 2024 tax season.

Source: Economic Policy Institute, “Government programs kept tens of millions out of poverty in 2021.”
WHO IS MISSING OUT?

- New parents, new caregivers, grandparent caregivers
- Immigrants, refugees, and newcomers
- Families/individuals whose primary language is not English
- Families/individuals in rural areas
- Low-income families/individuals

28% of eligible Coloradans do not claim the EITC.
GETTING THE WORD OUT

- Public Information Campaign: GetAheadColorado.org and HaciaAdelanteColorado.org
- Partner Toolkit: getaheadcolorado.org/partner-toolkit
- Media plan
- Training and technical support to direct service programs
- Language translation and interpretation
- Partnership and grants to
  - Volunteer Income Tax Assistance sites
  - Community-based organizations
  - Local public health agencies
EITC AND CHILD POVERTY DATA DASHBOARD

Earned Income Tax Credit Data by County

Select Year: 2020
Select Data Point: EITC Returns

Data point definition: Number of earned income tax (EITC) returns filed

Show VITA and AARP Tax Sites On Map

Map of EITC Returns

Select County for Map: (All)

EITC Returns by County

<table>
<thead>
<tr>
<th>County</th>
<th>EITC Returns</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLORADO</td>
<td>322,180</td>
</tr>
<tr>
<td>El Paso</td>
<td>47,780</td>
</tr>
<tr>
<td>Denver</td>
<td>44,270</td>
</tr>
<tr>
<td>Arapahoe</td>
<td>40,110</td>
</tr>
<tr>
<td>Adams</td>
<td>36,620</td>
</tr>
<tr>
<td>Jefferson</td>
<td>25,250</td>
</tr>
<tr>
<td>Weld</td>
<td>19,880</td>
</tr>
<tr>
<td>Larimer</td>
<td>16,830</td>
</tr>
<tr>
<td>Pueblo</td>
<td>14,870</td>
</tr>
<tr>
<td>Boulder</td>
<td>13,310</td>
</tr>
<tr>
<td>Mesa</td>
<td>10,820</td>
</tr>
<tr>
<td>Douglas</td>
<td>8,920</td>
</tr>
<tr>
<td>Garfield</td>
<td>3,460</td>
</tr>
<tr>
<td>La Plata</td>
<td>3,290</td>
</tr>
<tr>
<td>Montrose</td>
<td>3,210</td>
</tr>
<tr>
<td>Fremont</td>
<td>3,070</td>
</tr>
<tr>
<td>Delta</td>
<td>2,530</td>
</tr>
<tr>
<td>Eagle</td>
<td>2,510</td>
</tr>
<tr>
<td>Broomfield</td>
<td>2,500</td>
</tr>
</tbody>
</table>
Resources to Support Tax Conversations

- **2024 Tax Credit Basics**
  - English and Spanish

- **ITIN Basics**
  - English and Spanish

- **2024 Steps to File your Taxes**
  - 8 languages

- **2024 Tax Information for Newcomers**
  - 8 languages

- **Updated 2024 Tax Document Checklist**
  - 19 languages
  - Many people may not know what documents they need to file taxes

---

**WHAT DO I NEED TO FILE MY TAXES?**

You will need these documents to file your taxes:

- A photo ID (like a driver's license, state ID card, or passport)
- A Social Security (SSN) or individual taxpayer identification number (ITIN)
- Tax filer and each person listed on the tax return, such as your spouse or your children
- Both cards for you, if applicable, and dependents on the tax return. You may need the tax returns of the children for whom you are claiming the Child Tax Credit (CTC)
- W-2s, 1099s, and other tax-related documents that show income you earned during the year. If you don't have these, contact your employer to ask for them. You can also scan tax returns to get the information from these documents. You can use the IRS e-file system to file your tax information from last year's tax return, if you have not received your copy of your prior year's tax return. You can order a "Tax transcript" from the IRS using a new open tax transcript. The IRS can provide tax transcripts for the past three years
- W-2s, 1099s, and other tax-related documents that show income you earned during the year. If you don't have these, contact your employer to ask for them. You can also scan tax returns to get the information from these documents. You can use the IRS e-file system to file your tax information from last year's tax return, if you have not received your copy of your prior year's tax return. You can order a "Tax transcript" from the IRS using a new open tax transcript. The IRS can provide tax transcripts for the past three years
- Bank statements andIRSN 1-1099s that show income you earned during the year. If you don't have these, contact your bank to ask for them. You can also scan tax returns to get the information from these documents. You can use the IRS e-file system to file your tax information from last year's tax return, if you have not received your copy of your prior year's tax return. You can order a "Tax transcript" from the IRS using a new open tax transcript. The IRS can provide tax transcripts for the past three years
- If you attend school, owned a home, donated money, paid for child care, or paid for health insurance, you may need some additional documents:
  - If you paid for child care, note the total amount paid to your child care provider and their name, address, phone number, and Tax ID number.
  - If you own a home or other property, make sure you have your mortgage interest statement and property tax statement.

---

[getaheadcolorado.org/partner-toolkit](getaheadcolorado.org/partner-toolkit)
PARTNERSHIPS

Cross-sector collaboration supports innovation

- **State Agency Partners**
  - Human Services, Early Childhood, Labor and Employment, Office of Financial Empowerment
  - Cross-promotion of programs through mailers, web presence, partner communication channels
- **Volunteer Income Tax Assistance Sites**
- **2-1-1 Call Centers and United Way**
- **Community Based Organizations - 8 Grantees**
  - Used a power-sharing grantmaking model
  - Tailored approaches, language translation
- **New Types of Partners:**
  - Banking and tax
  - Workforce, unemployment, guest worker programs
  - AmeriCorps
  - Community Resource Center - a civic engagement partner using voter registration techniques
Leandra Lacy, MPH, CHES
Training and Technical Assistance Manager
Urban Institute
urban.org
Upward Mobility Framework
Three-Part Definition

Economic Success

When a person has adequate income and assets to support their and their family’s material well-being.

Mobility

Being Valued in Community

When a person feels the respect, dignity, and sense of belonging that comes from contributing to and being appreciated by people in their community.

Power and Autonomy

When a person has the ability to have control over their life, to make choices, and to influence larger policies and actions that affect their future.
The Upward Mobility Framework and Mobility Metrics

### The Three-Part Definition

#### ECONOMIC SUCCESS
- Opportunity-rich & inclusive neighborhoods
- High-quality education
- Rewarding work
- Healthy environment & access to good health care
- Responsive & just governance

#### POWER & AUTONOMY

#### DIGNITY & BELONGING

ENSURE EQUITABLE ACCESS FOR ALL, INCLUDING PEOPLE OF COLOR & OTHER MARGINALIZED GROUPS

### The Pillars

#### The Predictors

<table>
<thead>
<tr>
<th>Housing affordability</th>
<th>Access to preschool</th>
<th>Employment opportunities</th>
<th>Access to health services</th>
<th>Political participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing stability</td>
<td>Effective public education</td>
<td>Jobs paying living wages</td>
<td>Neonatal health</td>
<td>Descriptive representation</td>
</tr>
<tr>
<td>Economic inclusion</td>
<td>School economic diversity</td>
<td>Opportunities for income</td>
<td>Environmental quality</td>
<td>Safety from crime</td>
</tr>
<tr>
<td>Racial diversity</td>
<td>Preparation for college</td>
<td>Financial security</td>
<td>Safety from trauma</td>
<td>Just policing</td>
</tr>
<tr>
<td>Social capital</td>
<td>Digital access</td>
<td>Wealth-building opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation access</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rate of juvenile justice arrests

Focus on Racial Equity
Upward Mobility Cohort TA Awardees

- Alameda
- Riverside
- Boone
- Ramsey
- Summit
- Philadelphia
- Washington, DC
- St. Lucie
Using the Metrics

- Compare
- Reveal
- Prioritize
- Highlight Interconnections
- Set Targets
- Monitor
Housing affordability
Housing stability
Economic inclusion
Racial diversity
Social capital
Transportation access
Access to preschool
Effective public education
School economic diversity
Preparation for college
Digital access
Access to health services
Neonatal health
Environmental quality
Safety from trauma
Ratio of population per primary care physician
Share of low-weight births
Air quality index
Deaths due to injury per 100,000 people
Political participation
Descriptive representation
Safety from crime
Just policing
The Three-Part Definition & Structural Racism: Health Example

- Poor health, caused by racism (e.g., the inequitable placement of healthcare services and increased exposure to environmental contaminants, etc.) in communities of color, can lead someone to miss work more frequently and thus lose opportunities to make a consistent living or cause them to spend a large share of their income on addressing health challenges.

- Poor health and wellbeing can also impact someone’s ability to cope with stress and have the positive mental health needed to feel that they can make choices and form relationships.
Reducing gun violence: Chicago, IL

- **Issue**
  - Between 2015 and 2016, Chicago saw a 58% increase in homicides and a 43% increase in non-fatal shootings.
  - A relatively small number of young men were responsible for a large proportion of the gun violence. Few of them were being reached by existing community-based programs or services.

- **Addressing the issue**
  - The University of Chicago Urban Labs and the Heartland Alliance created the Rapid Employment and Development Initiative (READI)

- **Keys to success**
  - Partnerships with established community organizations
  - Commitment to using data and evaluating progress to inform real-time program improvements

Source: Economic Mobility Catalog (Results for America) - https://catalog.results4america.org/case-studies/gun-violence-chicago
Resources

- **Upward Mobility Framework Website**
- **Planning Guide for Local Action**
- Subscribe for updates on the Upward Mobility Framework project [here](#).
- Reach out to Upwardmobility@urban.org if you have questions.

Scan this QR code to access the mobility metrics data tables for your county or city (city population must be at least 75,000)
Submit Questions for Our Panelists

Tekisha Dwan Everette, Ph.D., MPA, CPH  
Executive Vice President  
Trust for America’s Health

Rachel Snyderman  
Director, Economic Policy Program  
Bipartisan Policy Center

Isabel Dickson, MPH  
Economic Mobility Program Manager  
Colorado Department of Public Health and Environment

Leandra Lacy, MPH, CHES  
Training and Technical Assistance Manager  
Urban Institute
Thank You to Our Moderator and Panelists

Tekisha Dwan Everette, Ph.D., MPA, CPH
Executive Vice President
Trust for America’s Health

Rachel Snyderman
Director, Economic Policy Program
Bipartisan Policy Center

Isabel Dickson, MPH
Economic Mobility Program Manager
Colorado Department of Public Health and Environment

Leandra Lacy, MPH, CHES
Training and Technical Assistance Manager
Urban Institute
Thank you!

@HealthyAmerica1  @BPC_Bipartisan

The recording and slides will be available at tfah.org and bipartisanpolicy.org