



National Webinar:

Promoting Health Equity Through Economic Mobility

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

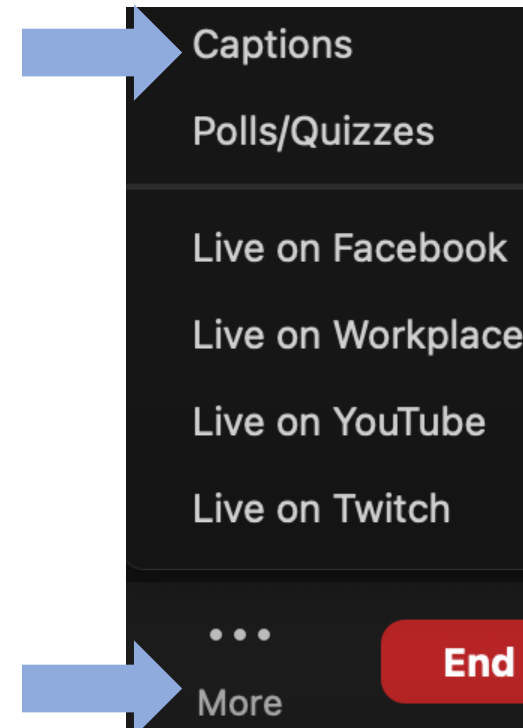
X @HealthyAmerica1 @BPC_Bipartisan
🌐 tfah.org bipartisanpolicy.org



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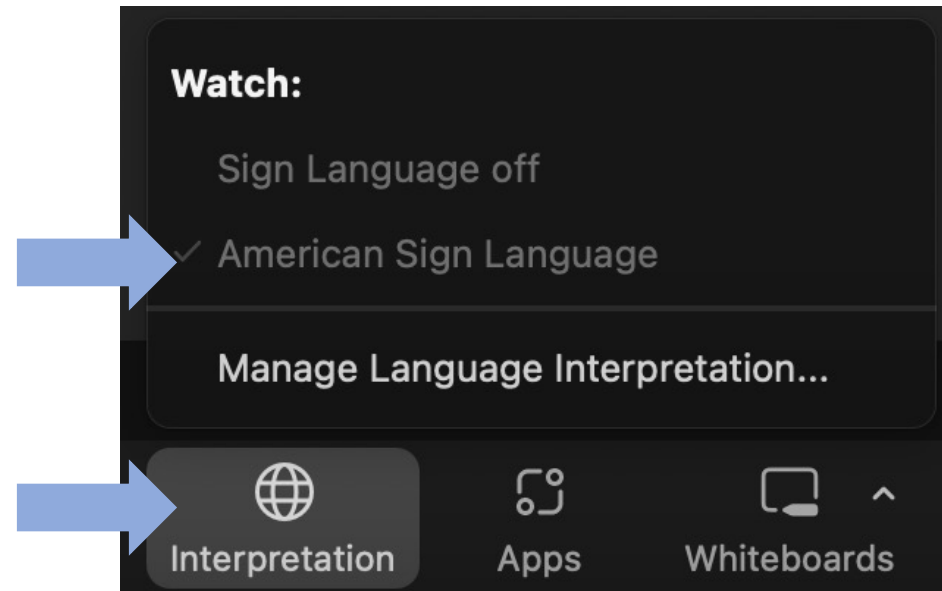
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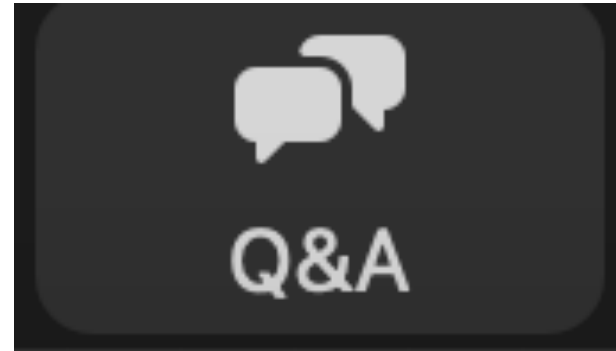
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Q&A Feature

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
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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

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Rachel Snyderman

Director, Economic Policy Program

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bipartisanpolicy.org





Bipartisan Policy Center
Where democracy gets to work

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
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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

¹<https://commonsenseinstitute.co.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

FUNDING

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



A photograph of a woman with dark hair, wearing a white knit sweater, smiling and clapping her hands. She is holding a young child with curly hair, who is also smiling and clapping. The background is a soft, warm light.

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

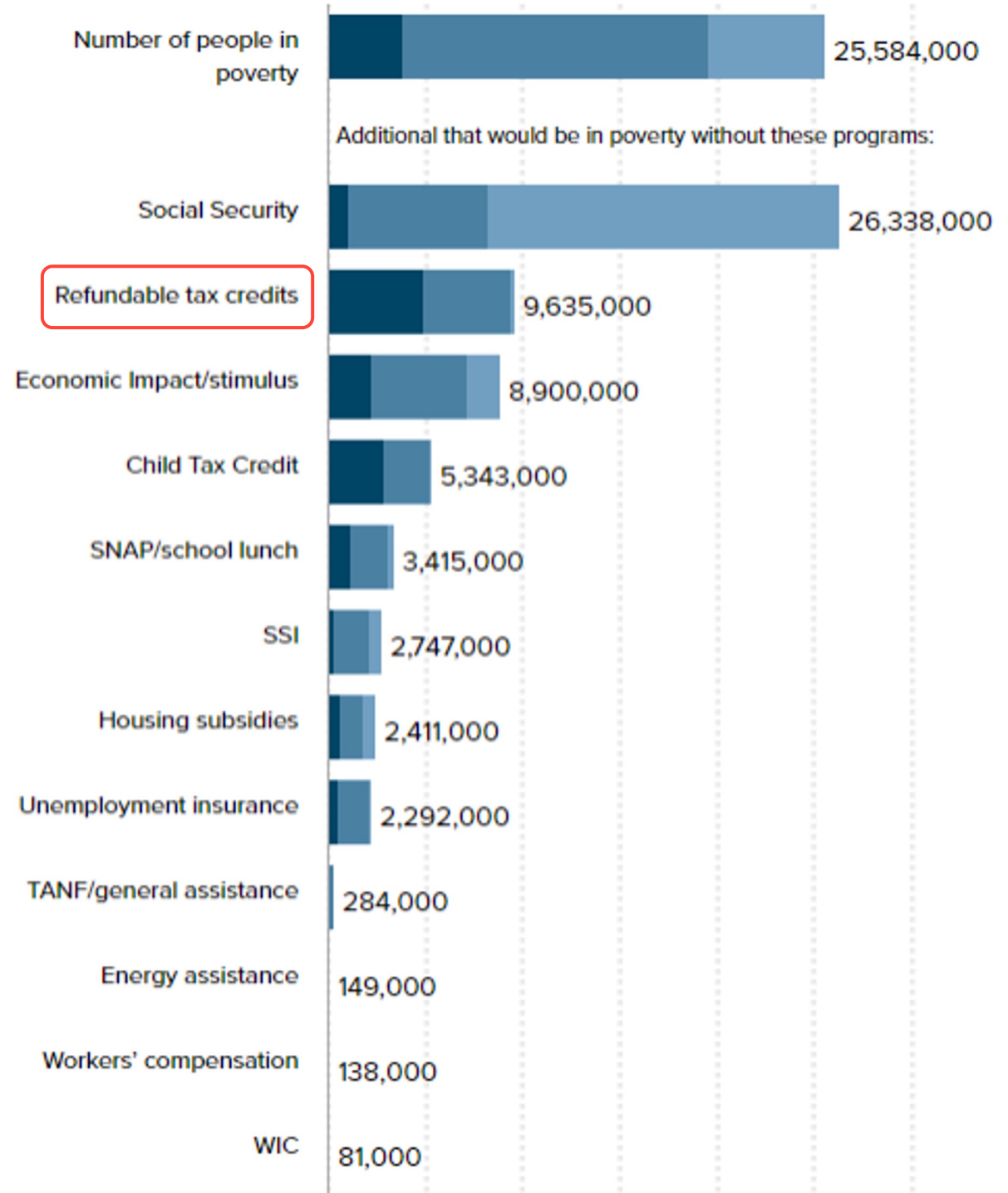
[“The 2021 Child Tax Credit: Implications For Health,” Health Affairs Health Policy Brief, February 10, 2022. DOI: 10.1377/hpb20220119.943898](#)

McInnis, N. S., Micheltore, K., & Pilkauskas, N. (2023). [The Intergenerational Transmission of Poverty and Public Assistance: Evidence from the Earned Income Tax Credit \(No. w31429\)](#). National Bureau of Economic Research.

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](https://getaheadcolorado.org) and
[HaciaAdelanteColorado.org](https://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: VITA and AARP sites

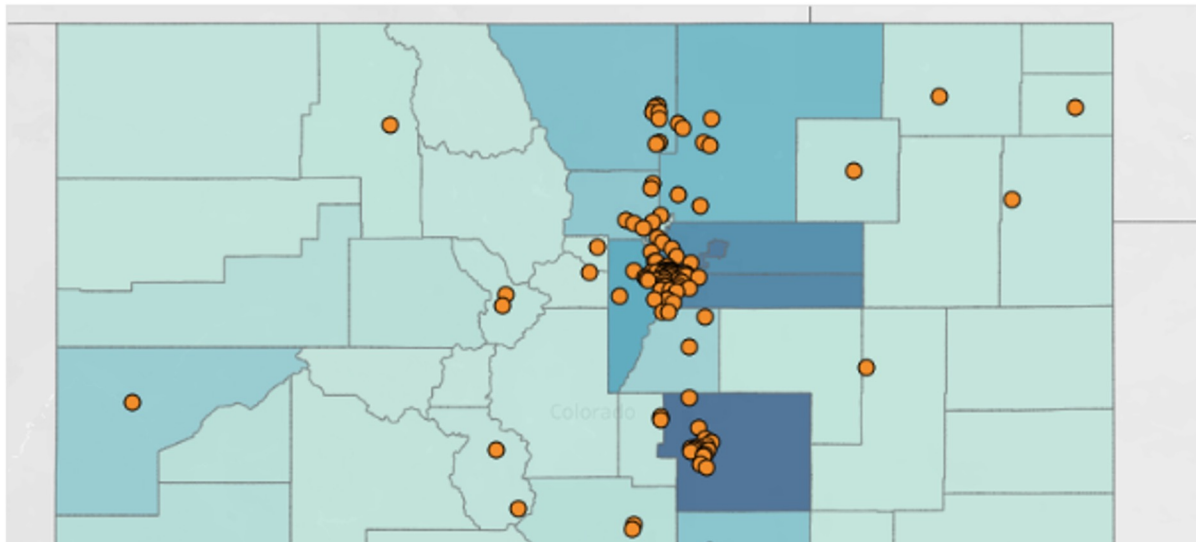
*IRS Statistics of Income 2021 data has not been released. 2021 data is only available for the following: Potential EITC filers, ITIN filers, Potential ITIN Population, and Percent of Potential ITIN Filers Who Filed.

Map of EITC Returns

EITC Returns by County

Select County for Map: (All)

Select County for Graph: (All)



LANGUAGE TRANSLATION: A TAILORED APPROACH

HACIA ADELANTE COLORADO
Información de impuestos para recién llegados

GET AHEAD COLORADO
خطوات تقديم الضرائب الخاصة بك

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) card or Individual Taxpayer Identification Number (ITIN) letter for yourself and each person listed on the tax return, such as your spouse or your children.
- Birth dates for you, your spouse, and dependents on the tax return. You may need the birth certificates of the children for whom you are claiming the Child Tax Credit (CTC).
- W2s, 1099s, and other tax-related documents that show income you earned during the year. If you don't have your W2(s), contact your employer to ask if/when the W2(s) were mailed. If you did not receive it/them, [contact the IRS](#).
- A checking or savings account number and bank routing number to receive your refund by direct deposit, or your mailing address to have a check mailed to you.
- Prior year tax returns, if you have them. To find your tax information from last year, check the tax software you used, or ask the tax preparer you worked with last year for a copy of your prior return. If you cannot get a copy of your prior year's tax return, you can order a "tax transcript" from the IRS using their [online tax record tool](#). The IRS can provide tax transcripts for the past three years.
- Identity Protection PIN (IP PIN), if you have one. [Learn more about an IP PIN here](#).
- Some free, secure tax filing websites may require you to have an email address.

If you went to school, owned a home, donated money, paid for childcare, or paid for health insurance, you may need some additional documents:

- If you paid for child care, note the total amount paid to your childcare 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.

English 1

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



PARTNERSHIPS

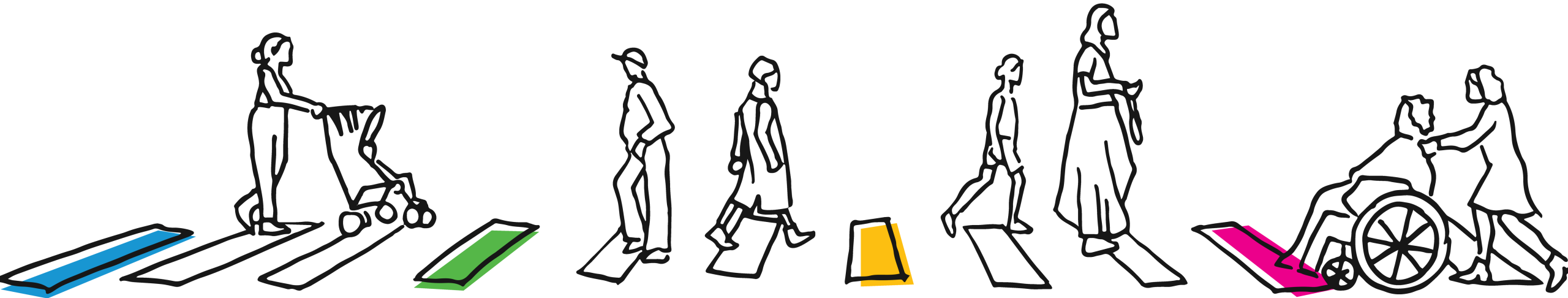
Cross-sector collaboration supports innovation

- **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



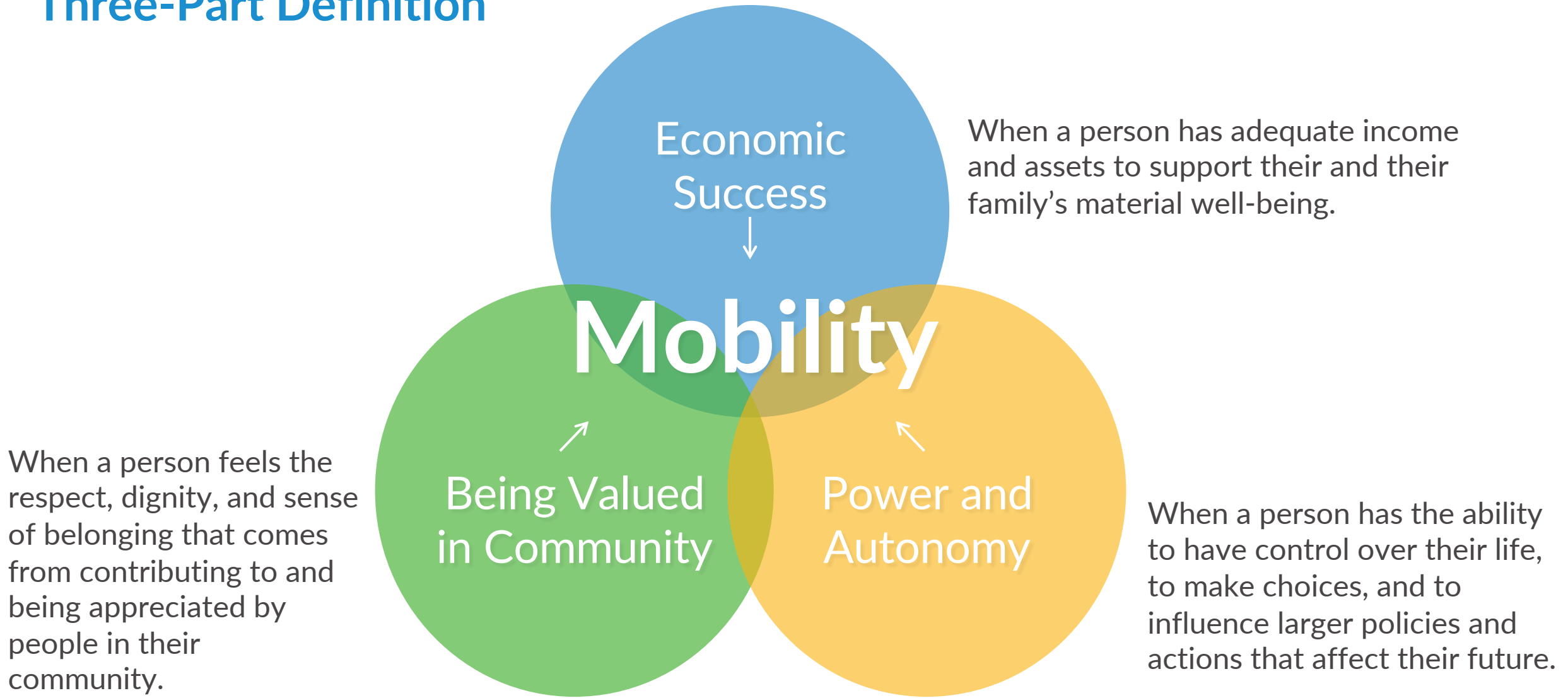
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Upward Mobility Framework

Three-Part Definition



UPWARD MOBILITY FROM POVERTY

The Three-Part Definition



The Pillars



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

Focus on Racial Equity

The Predictors

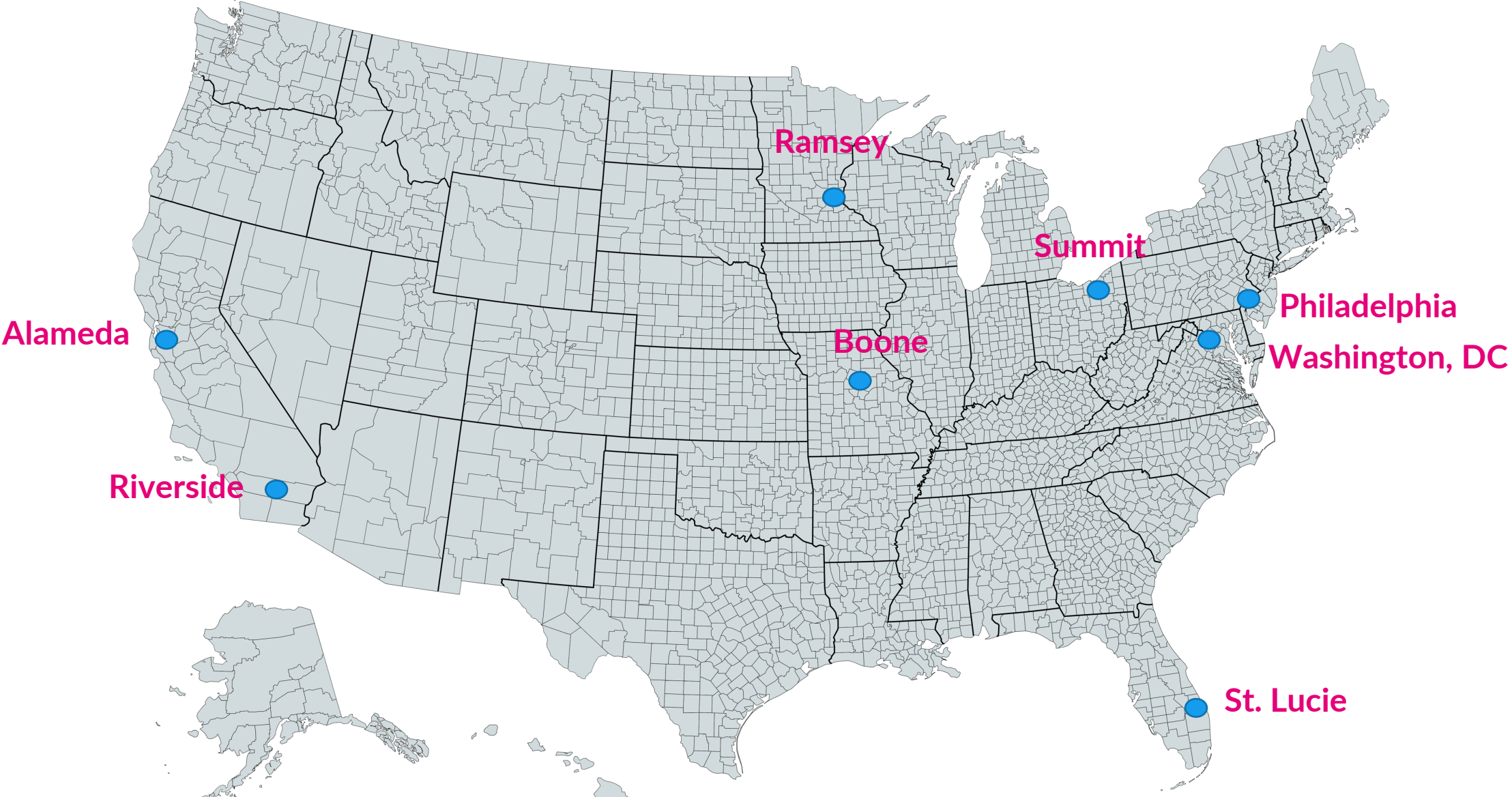
Housing affordability	Access to preschool	Employment opportunities	Access to health services	Political participation
Housing stability	Effective public education	Jobs paying living wages	Neonatal health	Descriptive representation
Economic inclusion	School economic diversity	Opportunities for income	Environmental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

Mobility Metric

Rate of juvenile justice arrests

The Upward Mobility Framework and Mobility Metrics

Upward Mobility Cohort TA Awardees



Using the Metrics

Compare

Reveal

Prioritize

**Highlight
Interconnections**

Set Targets

Monitor



OPPORTUNITY-RICH & INCLUSIVE NEIGHBORHOODS

HIGH-QUALITY EDUCATION

REWARDING WORK

HEALTHY ENVIRONMENT & ACCESS TO GOOD HEALTH CARE

RESPONSIVE & JUST GOVERNANCE

Housing affordability

Access to preschool

Employment opportunities

Access to health services

Ratio of population per primary care physician

Political participation

Housing stability

Effective public education

Jobs paying living wages

Neonatal health

Share of low-weight births

Descriptive representation

Economic inclusion

School economic diversity

Opportunities for income

Environmental quality

Air quality index

Safety from crime

Racial diversity

Preparation for college

Financial security

Safety from trauma

Deaths due to injury per 100,000 people

Just policing

Social capital

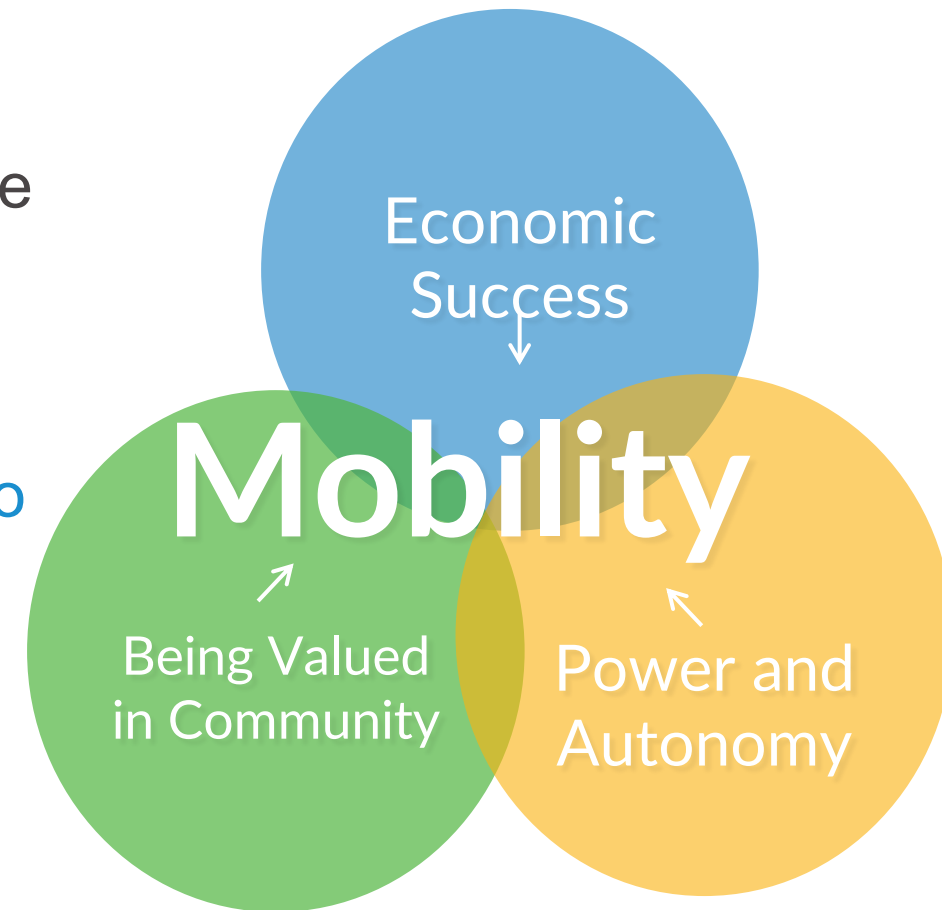
Digital access

Wealth-building opportunities

Transportation access

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



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Thank You to Our Moderator and Panelists



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Thank you!

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

