



Strategies to Engage Underserved Native Communities

Presented by: Oklahoma Native Assets Coalition (ONAC)

The Center on Budget & Policy Priorities

Tax Time Thursdays

April 6, 2023

2:00 p.m. ET



Oklahoma Native Assets Coalition, Inc.

Christy Finsel, Ph.D.
Executive Director
Oklahoma Native Assets
Coalition, Inc.
Citizen of the Osage Nation
cfinsel@oknativeassets.org





Introduction

The Oklahoma Native Assets Coalition, Inc. (ONAC) is a nonprofit Native asset-building coalition that collaborates with Native Nations and other partners to promote and establish Native-led and culturally compatible asset-building programs and initiatives in Native communities. ONAC and partners work together to create greater opportunities for self-determined economic success for tribal citizens.

<https://oknativeassets.org>



ONAC's Interrelated Asset-Building Programs (Continued)

Current Native-specific programs and initiatives include:

- Intermediary funder: Mini-grant program (supporting 20 Native VITA programs in 2023)
- National Native EITC/VITA Network
- Native Bank On ONAC
- Training and TA
- Resource guides: Investor education, remote financial education, and Native women entrepreneurs
- National research: Best practices for delivering Native asset-building programs (such as remotely-provided VITA in Native communities) and documentation of Native children's savings initiatives



ONAC's Interrelated Asset-Building Programs

Current Native-specific programs and initiatives include:

- Native-specific financial education
- Financial coaching
- Children's Savings Account program
- Emergency Savings Account program
- Down payment assistance program
- Emergency cash assistance program
- Prevention of frauds and scams



ONAC Awarding \$227,500 in Native VITA Funding

- The twenty grant awards represent the largest number of grant awards made during this tax season, in the country, by one grantor in support of Native VITA sites.
- ONAC was able to make these awards in 2023 with generous support from the Wells Fargo Foundation, Target Foundation, Kresge Foundation, and the Bank of America Charitable Foundation. Last year, also had support from Share Our Strength. Partnered with Code for America to co-host a training for VITA supporters to promote CTC outreach.
- These invitation-only Native VITA grants provide flexible funding for underserved Native VITA programs. ONAC offers a simple process for the grant applications and reporting.



Native VITA Awardees

- Cherokee Nation Commerce Services (Tahlequah, Oklahoma)
- Community Development Financial Institution of the Tohono O'odham Nation (Sells, Arizona)
- Fallon Paiute Shoshone Tribe (Fallon, Nevada)
- Four Bands Community Fund, Inc. (Eagle Butte, South Dakota)
- Four Directions Development Corporation (Orono, Maine)
- Lakota Funds (Kyle, South Dakota)
- People's Partner for Community Development (Lame Deer, Montana)
- Stockbridge-Munsee Community Band of Mohican Indians (Bowler, Wisconsin)
- Tlingit Haida Regional Housing Authority (Juneau, Alaska)
- The Chickasaw Nation (Ada, Oklahoma)



Native VITA Awardees

- The Menominee Indian Tribe of Wisconsin (Keshena, Wisconsin)
- Walker River Paiute Tribe (Schurz, Nevada), pending
- White Earth Investment Initiative (Ogema, Minnesota)
- White Mountain Apache Tribe Housing Authority (Whiteriver, Arizona)
- Ysleta del Sur Pueblo (El Paso, Texas)
- Sitting Bull College (Fort Yates, North Dakota and McLaughlin and Mobridge, South Dakota)
- Pueblo of Acoma Housing Authority (Pueblo of Acoma, New Mexico)
- Muscogee (Creek) Nation (Okmulgee, Oklahoma), pending
- Shoshone-Bannock Tribe of the Fort Hall Indian Reservation (Fort Hall, Idaho), pending
- Mashantucket Pequot Tribe (Mashantucket, Connecticut)



Integration: Connecting Native VITA Clients to Other Resources

- ONAC provides Native VITA resources:
<https://bit.ly/NativeVITA2023>
- Also, works with IRS to promote On-Line Taxes, Inc.
- ONAC connects support of Native VITA programs to other Native asset-building programming:
 - National Native banking access:
https://bit.ly/AccountFeatures_ONAC
 - <https://bit.ly/ONACGetBanked>
 - ONAC financial coaching: <https://bit.ly/ONACCoaching>
 - CSAs, ESAs, down payment assistance, etc.



ONAC Native EITC/VITA Network

Patsy Schramm
ONAC Native EITC/VITA
Network Coordinator
Citizen of the Cherokee Nation
edgpj@aol.com





ONAC Native EITC/VITA Network

- Comprised of about 250 Native & Native-serving VITA site coordinators and advocates
- Share information, resources and opportunities
- Serve on Prosperity Now's Taxpayer Opportunity Network (TON) Steering Committee & provide a Native perspective when appropriate
- Sometimes invited to participate in National efforts to share the Native perspective



Unique Obstacles and Learned Best Practices for Outreach

- One of the biggest **obstacles** facing Native communities now is the push for Facilitated Self Assistance (FSA) return filing when connectivity & related skills are lacking.
- As a **best practice**, outreach is best accomplished through trusted sources.

Partnering as an Ally

- Be consistent in what you offer- don't start something, then disappear.
- Be respectful.
- Connect with Native VITA programs in your geographic area.



Outreach Strategies to Reach Native Populations in Urban Communities

- Urban Indian Centers
<https://www.nuifc.org/members>
- Indian Health Service (IHS) Facilities
<https://www.ihs.gov/locations/>

Virtual Volunteers?

- Some Native VITA sites would welcome virtual volunteers to prepare returns based on intake at their VITA sites. If a certified volunteer is interested, you may **contact me** & I can share your offer.
- If interested in volunteering, but not yet certified, you will find information & can sign up at:
<https://www.irs.gov/individuals/irs-tax-volunteers>
- IRS Territory Managers could also help you with the process:
<https://www.taxoutreach.org/outreach-strategies/irs-territory-managers/>



Thank you!

Thank you for your interest in reaching out to Native communities!

- Join the ONAC Native EITC/VITA Network:
<https://bit.ly/NativeVITAEITCNetwork>
- Questions?
- Contact us at:
 - Christy Finsel- cfinsel@oknativeassets.org
 - Patsy Schramm- edgpj@aol.com