

# Don't Mess with Texas (or Student Taxes)

**College and high school students get ahead when they prepare their FAFSA and tax returns simultaneously.**

Every spring, millions of high school seniors and college students navigate the financial aid process in hope of finding the funds needed for post-secondary education. To receive this aid, students or their parents must complete a FAFSA, a Free Application for Federal Student Aid. Before filling out a FAFSA, a student must have a completed federal income tax return on file. This has created an opportunity for free tax filing assistance efforts to join the FAFSA application process when providing support to low-income families nationwide.



With support from the Walmart Foundation, United Way of Southern Cameron County in Brownsville and the University of Texas at Brownsville partnered in 2010 to support approximately 300 students (and families) learning to file their own taxes and complete required FAFSA forms through MyFreeTaxes.com.

**How did this partnership work and how can it succeed? More importantly, how can other colleges and tax preparation coalitions successfully reproduce this model?**

## **About the County, City, and School**

Cameron County, Texas is among the nation's 100 poorest counties with an average family income of \$30,024<sup>1</sup>. Southern Cameron County is the home of UT Brownsville and more than 90 percent of its students come from the region. Not only are the students local residents, but many need financial assistance to attend the area's only 4 year college. Over

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<sup>1</sup> US Census, 2008

70 percent of full-time undergraduates at UT Brownsville receive grant aid, which covers, on average, over 70 percent their total academic costs<sup>2</sup>. Accordingly, many of the college's activities aim to help economically disadvantaged students who rely heavily on financial aid.

## **Forming a Partnership**

United Way of Southern Cameron County and the Economic Opportunities Coalition have a long-standing relationship with UTB's Financial Aid Department. UTB focuses its financial aid efforts on current students and high school seniors to ensure that completed applications for federal aid and income tax forms are on time and correct. The partnership created with an online tax preparation project provides high-tech tax assistance and financial education to low-income students.

In light of the preparation needed for this project to be successful, United Way of Southern Cameron County and the college began planning this project at the beginning of the fall term. Early planning is crucial due to the academic calendar that has the end of term exams in December and a long winter break that lasts into January that can make last minute changes difficult.

## **Setting up on a College Campus**

United Way and UTB's Financial Aid Office selected high-traffic sites that could accommodate a temporary setup of tables, chairs, Internet-ready laptop computers and printers. Successful sites included the student union building, Financial Aid office and the library.



## **Setting up at High School Financial Aid Events**

As part of the FAFSA filing season, UTB hosts a number of financial aid events at local high schools. At these events, UTB helps high school seniors fill out and submit their FAFSAs.

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<sup>2</sup> The University of Texas at Brownsville Accountability Profile (link accessed 8/1/10  
<http://www.utsystem.edu/osm/accountability/2008/Profiles/UTBAccountabilityProfile.pdf>

Working in conjunction with the free tax project, UTB was also able to offer onsite tax preparation and information to high school students and their parents at college fairs and FASFA workshops throughout the area.

### **Communication Strategy**

Time constraints across nonprofit and academic institutions can make communication before and during tax season particularly challenging. The leaders at United Way of Southern Cameron County understood that local organizations should be on the same page and have a similar approach and messaging. However, to avoid overloading partner schedules with standard monthly meetings, the communication strategy allowed the project to move forward successfully by prioritizing meetings through phone and email.

### **Marketing and Advertising Campaigns**

Several marketing and promotional strategies advertised the tax project.

#### ***College Radio and Newspaper***

Coalition members worked with the local college radio station to air public service announcements informing students of event dates, times, and locations. The messages emphasized that free tax prep was sponsored by UTB and included dates and times for the temporary sites. Similar messages were advertised in the student newspaper.

#### ***Collateral***

Promotional materials were created and distributed throughout the campus, including common areas and administrative offices, by staff and United Way volunteers. Customized materials were printed to communicate essential event information (location and hours) and then distributed around campus. Flyers were placed in professors' mailboxes for distribution in class. Posters were placed in windows and on walls throughout classrooms, activity buildings and cafeterias. In addition to the event information, collateral information reminded students they could not complete the FASFA until they had filed their taxes. To validate the event to the students, all of the collateral indicated that UTB's Financial Aid Department was sponsoring the event.

## ***The Tax Lab***

This project was supported by a vehicle that moved from site-to-site, providing portable storage for the computer equipment and office supplies while acting as a moving billboard. The vehicle was decorated with signs and balloons and was parked in front of each site to help generate interest. The hazard lights were left on to attract attention and the radio was turned up to create excitement.



On event days, United Way staff and volunteers came early to set up the equipment, raise additional banners and set out materials.

Seamless operations occurred most often at sites where tax and FAFSA seminars were located at existing computer labs or facilitates. The financial aid department was one of the easiest locations to establish and maintain. The event was an easy transition for those students already recognizing the financial aid office as a relevant service provider.

## **Lessons Learned**

The following are some specific lessons for others implementing this model with an academic partner:

- Begin creating and implementing plans early in the fall semester. Approval for site selection and promotional materials has to go through several levels of approval when in a university, junior college or trade school setting.
- Avoid certain terms like “van” and “mobile”: The marketing of the project as a mobile tax van triggered conversations about parking, vehicles and permits which ultimately distracted attention from the goals of the initiative.
- Obtain necessary permission in advance to distribute fliers and post signs: Many of these materials had to be literally “stamped” or “signed” by the financial aid department.
- Stay in one location the entire time if possible. Even on the same campus, moving from one spot to another resulted in a loss of traffic as students spread the word and were

unaware of any relocation.

## **Conclusion**

Both FAFSA and income tax forms require financial know-how and create a substantial amount of stress and angst. With early planning and support from the university and outreach channeled through student groups, nonprofit organizations can help low-income students and parents navigate the financial aid process while helping residents complete their income taxes for free.