

UNITED WAY of FLORIDA

C PITOL DAYS

2024 SESSION



MEET ALICE



In Florida, ALICE keeps our state’s economic engine humming. ALICE, an acronym for Asset Limited, Income Constrained, Employed - the key word is “employed” - gives a name to nearly 33 percent of our state’s population. These hard workers do not earn enough to support their own families and are regularly forced to make tough choices like deciding between quality childcare or paying the rent, which have long-term consequences not only for their families, but for all Florida’s residents.

WE KNOW ALICE

While ALICE households exist across all demographic groups, the pandemic exposed and widened gaps in rates of hardship by race/ethnicity, age, and household composition. In Florida, White households are more likely to live below the ALICE Threshold, however the percentage is higher in households for other groups. Florida’s youngest and oldest households have the highest rates of hardship with 71% of households headed by someone under age 25 and 53% of senior households living below the threshold.



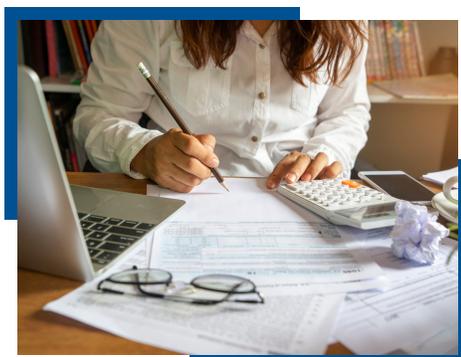
ALICE AT WORK

In Florida, nearly 70% of jobs pay \$20 or less per hour but make up a majority of our workforce. Many of these positions were celebrated as essential heroes during the COVID-19 pandemic from working in childcare to healthcare to keeping us safe in our homes and workplaces, but they do so much more, including everything from staffing our state’s robust tourism and retail marketplace to servicing the nearly 8 million automobiles owned by Floridians.



ALICE & INFLATION

The annual ALICE Household Survival Budget including only the basic costs needed to live and work in Florida, rose by 12% for a single adult, by 11% for a senior citizen, and by 7% for a family of four with two small children in the most recent report. With the increasingly high rate of inflation, things continue to get worse for many.



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Why we're here and what we're advocating for.



FINANCIAL STABILITY

Help over 72,000 families and individuals within Florida's ALICE population, receive more than \$76 million in tax refunds, more than \$20 million in Earned-Income Tax Credits (EITC), and education tax credits for Floridans pursuing higher education.

- **INVEST** \$1.8 million to enhance opportunity for free tax preparation statewide in all 67 counties.
- **ENHANCE SERVICES** to underserved populations in the state's hardest-to-reach areas.
- **INCREASE CAPACITY**, while improving quality and accuracy.



HOUSING ATTAINABILITY

Identify and support opportunities to address attainable housing in our state. In collaboration with Florida's network of United Ways and many others, United Way of Florida was pleased to support the landmark Live Local Act (LLA) passed in 2023. We applaud the pivotal steps toward mitigating Florida's housing issues and continued effort.

- **FOCUS** resources on programs incentivizing the construction of affordable rental units.
- **SUPPORT** legislation that would expand access to home ownership programs.



BEHAVIORAL HEALTHCARE ACCESSIBILITY

Support efforts to expand behavioral healthcare access for Florida's ALICE (Asset Limited, Income Constrained, Employed) families, by increasing reimbursement rates for providers and enacting policy changes that promote workforce development.

- **INCREASE** reimbursement rates significantly for behavioral healthcare across the board which would help address these issues and improve access to care for more families.
- **ENHANCE** Florida's behavioral health talent pipeline.



CHILDCARE AFFORDABILITY

Support efforts to make childcare more affordable for Florida's ALICE families including increased eligibility for School Readiness and new tax incentives and exemptions for businesses that support access to childcare for employees.

- **INCREASE** initial eligibility of School Readiness to provide subsidies to make childcare affordable for low-income families.
- **CREATE** incentives for private sector investment.
- **SUPPORT** state investments to increase access to extended early learning programs.

Help over 72,000 families and individuals, within Florida's ALICE (Asset Limited, Income Constrained, Employed) population receive more than \$76 million in tax refunds, more than \$20 million in Earned-Income Tax Credits (EITC), and education tax credits for Floridans pursuing higher education.

WHAT CAN BE DONE?

- **INVEST \$1.8 million in state funding**, matched by \$1.8 million from United Way, to offer enhanced opportunities for free tax preparation statewide in all 67 counties.
- **ENHANCE SERVICES to underserved populations** in the state's hardest-to-reach areas building capacity, stronger relationships and setting the stage for financial literacy programming and services for residents of all communities.
- **INCREASE CAPACITY, while improving quality and accuracy**, by expanding electronic filing and increasing recruitment and training of volunteers.

Annually, thousands of IRS-certified volunteers at more than 300 tax preparation sites are mobilized by United Way, AARP, the Military and VITA to provide reliable tax preparation assistance to Florida's ALICE families, veterans, the elderly and the disabled enabling them to meet tax obligations and receive the highest refund for which they are eligible. In 2023, this resulted in 72,632 tax returns filed and \$76+ million in tax refunds including \$20+ million in EITC.

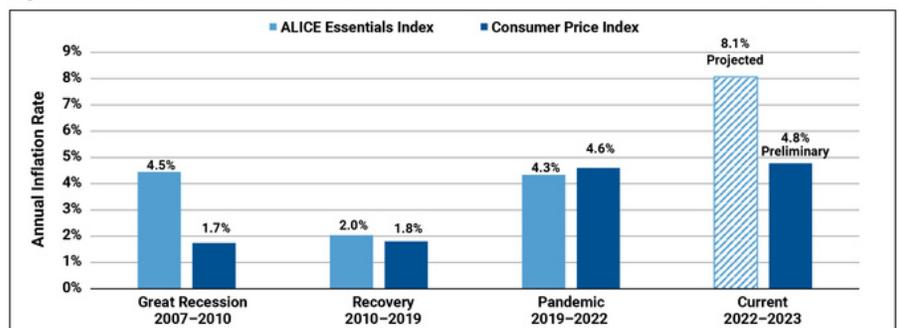
WHY IT IS IMPORTANT?

Research credits the bi-partisan EITC as one of the best and most effective anti-poverty tools in our nation, but it is extremely underutilized. The work-based tax refund allows ALICE families to recover hard-earned wages, but more than \$1.2 billion in potential EITC tax credits are unclaimed by Florida ALICE households each year. Sadly, these funds are "left on the table" in Washinton D.C.

EITC users spend refunds on essential household items generating sales tax revenue for our state. In 2022, the average Florida taxpayer receiving EITC through VITA had a household gross income of \$32,000 and received \$1,500 in refunds -- enough to pay for preventative healthcare, family groceries, housing costs or car repairs.

The 2023 Legislature appropriated \$1.2 million to United Way to provide income tax preparation assistance to 30,000 ALICE workers during the 2024 tax season. This investment, matched with \$1.8 million by United Way, is anticipated to generate \$24 million in refunds for these hard-working Floridians (including \$6.5 million in EITCs) and an estimated \$1.2 million in state and local sales taxes.

Figure 2. Annual Inflation Rate, Florida ALICE Essentials Index vs. National CPI, 2007–2023*



Identify and support opportunities to address attainable housing in our state. In collaboration with Florida's network of United Ways and many others, United Way of Florida was pleased to support the landmark Live Local Act (LLA) passed in 2023. We applaud the pivotal steps toward mitigating Florida's housing issues and continued efforts.

WHAT CAN BE DONE?

- **FOCUS resources** on programs incentivizing the construction of affordable rental units.
- **SUPPORT legislation** that would expand access to home ownership programs.



WHY IT IS IMPORTANT?

The relentless escalation of housing costs, affecting both renters and homeowners, casts a profound shadow over Florida's ALICE (Asset Limited, Income Constrained, Employed) families, underscoring the gravity of the state's housing crisis. Florida's housing crisis has propelled the state into one of the nation's most expensive places to live and has triggered a notable surge in cost burdened and extremely cost burdened households. This predicament is exacerbated by a rapidly growing population, escalating insurance costs, and an influx of out-of-state investors purchasing homes for rental purposes.

According to the National Low Income Housing Coalition, the Fair Market Rent (FMR) for a 2-bedroom apartment in Florida is a staggering \$1,591 monthly requiring a family to earn \$5,302 per month or \$63,622 annually to afford the apartment at FMR rate and not spend more than 30% of their income on housing costs. The US Department of Housing and Urban Development defines cost burdened as monthly housing costs, including utilities, that exceed 30% of monthly income.

Affordability isn't confined to renters; it also challenges homeowners. With the average median income of \$69,679 in Florida's three major metropolitan areas, homeowners allocate close to half of their annual income toward housing costs, according to the Home Ownership Affordability Monitor from the Federal Reserve Bank of Atlanta.

The Florida Legislature took action with the LLA, strategically designed to invigorate housing development efforts through tax incentives, local pre-emptions, and record funding for affordable housing programs. It offers a comprehensive framework and diverse measures to tackle housing challenges and facilitate affordable housing development statewide. Florida's United Way network supports components of the LLA and recognizes the positive steps toward housing concerns.

Support efforts to expand behavioral healthcare access for Florida's ALICE (Asset Limited, Income Constrained, Employed) families, by increasing reimbursement rates for providers and enacting policy changes that promote workforce development.

WHAT CAN BE DONE?

- **INCREASE reimbursement rates** significantly for behavioral healthcare across the board to help address these issues and improve access to care for more families.
- **ENHANCE Florida's behavioral health talent pipeline** by considering steps such as streamlining licensure requirements for clinical social workers and other needed professionals and making additional investments in training programs and workforce development initiatives.



WHY IT IS IMPORTANT?

Florida is ranked #1 in the nation with nearly 3 million adults, or 17.49%, experiencing mental illness. In terms of overall prevalence of mental health and substance abuse issues, Florida is in the top ten. Unfortunately, our state also ranks 46th for access to behavioral health care. There is currently a 550-to-1 ratio of residents to mental health providers in Florida, among the highest in the nation. Because there are not enough providers to meet the growing demand for quality behavioral health services, many families experience difficulty finding care, and this is especially true for Florida's ALICE population.

Root causes of this problem are complicated and numerous. How providers are reimbursed for services is, in part, related to the issue. Reimbursement rates, including Medicaid, remain lower than the cost of care. Consequently, many providers—specifically those who serve lower-income populations—face difficulty attracting and retaining qualified professionals who can earn substantially more in private practice. This has an overall negative effect on Florida's behavioral health workforce. Because economic insecurity is a social determinant of mental health, the resulting lack of services is especially harmful to members of Florida's ALICE population, who may need help but cannot afford the added cost of seeing a private provider.

During the last session, the Legislature did increase Medicaid reimbursement rates for behavioral health care, however the 15% increase only applied to four procedure codes, none of which resolved the issues noted above.

Support efforts to make childcare more affordable for Florida's ALICE (Asset Limited, Income Constrained, Employed) families including increased eligibility for School Readiness and new tax incentives and exemptions for businesses that support access to childcare for employees.

WHAT CAN BE DONE?

- **INCREASE initial eligibility of School Readiness to provide subsidies, making childcare affordable for low-income families.** With minimum wage increases, many two-parent families with lower wages do not currently qualify for childcare subsidy. Increasing the initial eligibility above the current state statute of 150% of Federal Poverty Level will support economic mobility by enabling families to access affordable childcare while increasing their educational attainment or working.
- **CREATE incentives for private sector investment.** Policies that promote private sector investment in early education and childcare support both child development and talent needed by businesses. Tax incentives and exemptions can be developed for businesses to provide employee childcare benefits and contribute to quality early education programs.
- **SUPPORT state investments** to further increase access to extended early learning programs.



WHY IT IS IMPORTANT?

- **Childcare is a key support for Florida's workforce.** Parents make up 51% of the workforce and 35% of those parents have young children. If childcare is not affordable and accessible, parents' ability to participate in the labor force can be compromised.
- **Childcare challenges result in a multibillion-dollar loss to Florida's economy.** According to the Florida Chamber report, *Untapped Potential in FL*, \$911 million in tax revenue is annually missed due to childcare issues. Childcare related absenteeism and employee turnover cost employers \$3.47 billion per year.
- **Businesses need talent.** With nearly 500,000 open jobs in Florida, childcare is critical to both the recruitment and retention of our workforce and is needed to support and develop sustainable talent for a healthy state economy.

Annually, Florida's average cost of childcare for young children is greater than in-state tuition at a public university. Compounded by rising rents and price increases for essentials like food, healthcare, and transportation, childcare expenses threaten access to quality early-learning experiences and decrease labor force participation for parents.

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SCHEDULE

TUESDAY

6:00 - 7:30 PM Reception at Eve On Adams

WEDNESDAY

7:45 AM Check-in opens

8:00 - 8:30 AM Breakfast Buffet

8:20 - 11:45 AM Program and Speakers

12:00 - 1:00 PM Lunch Buffet and Closing Speakers

BREAK

1:30 - 5:00 PM Capitol Visits

2:30 PM Tour of Senate Chambers cancelled due to Special Session. New option, tbd.



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2024 RECEPTION



We invite you to join our local United Way leaders and volunteers from across the state at our legislative reception.

EVE ON ADAMS

101 S. Adams St., Tallahassee FL 32301

NOV 7

**6-7:30
PM**

2023

RSVP to Matt@TeamRSA.com

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INTRODUCE EVERYONE YOU MEET TO ALICE

ALICE is the acronym for Asset Limited, Income Constrained, Employed, with “employed” being the key word. At United Way, we work with ALICE every day.

United Way’s groundbreaking Florida ALICE Report spotlights these workers who collectively form the backbone of Florida’s economy. We rely on ALICE for everyday supports and services.

Bring your local ALICE Data to your meetings.



BE AN ADVOCATE FOR ALICE

What’s New in 2023



- From 2022-2023, Florida’s struggling households increased from over 3.6 million to nearly 3.9 million.
- Households living paycheck to paycheck rose by nearly 84,500; while 142,608 more families fell into poverty.
- The pandemic exposed widened gaps of hardship by race/ethnicity, age, and household composition.
- In 2021, Florida’s White households were more likely to be ALICE, but percentages are higher within other groups.

Who Is ALICE?



- 70% of the 20 most common jobs in FL paid less than \$20 per hour in 2021.
- Our youngest and oldest households had the highest rates of hardship: 71% headed by someone under age 25, and 53% of senior households live below the threshold.
- Single parents, both male (60%) and female (77%) were most likely below the ALICE Threshold.
- 59% of Florida’s Black households and 51% of Hispanic households were below the ALICE Threshold in 2021, compared to 40% of White households.

How Can I Help?



Scan this QR code to visit the UWOF website, where you can learn more about the ALICE population and view state and national reports.



www.uwof.org



THANK YOU TO OUR GENEROUS SPONSORS



United Way of Broward Cty.
United Way of Central Florida
Heart of Florida United Way



Thank you also to the United Way of Florida Public Policy Team for all the preparation, dedication and work that has gone into the development of our Consensus Agenda and this Capitol Days Event. Also thank you to our State Communications Team for helping with our graphic design.

*Michael Griffin, UWOF Board & Advent Health
 Amber Miller, UWOF Board & UW North Central FL
 Nazbi Chowdhury, UW Broward County
 James Ellout, UW Northeast FL
 Maria Hernandez, UW Broward County
 Graciela Noriega Jacoby, Heart of FL UW
 Daniel Vanegas, Heart of FL UW
 Alyssa Lang, UW Volusia-Flagler Counties
 Jordan Weiland, UW Central FL*

*A very special thanks to RSA Consulting:
 Natalie King, Matt Herndon*

ADVOCACY 101 IN TALLAHASSEE: 5 THINGS YOU NEED TO KNOW

- 1 Make Introductions:**
 - Use the title Representative or Senator, even if you know them personally
 - Identify yourself, that you're with United Way, *and* your company name
 - If there's time, share why you support United Way and are here for Capitol Days
- 2 Make it Quick:**
 - Appointments are 5-15 minutes and scheduled between committees & chamber sessions
- 3 Be Brief with a Specific Ask:**
 - State your case in 2-3 brief sentences
 - Follow with a specific ask
 - Leave behind an issue brief
- 4 Recognize Legislative Aides:**
 - are an important person to know in Tallahassee
 - are the gatekeeper of information and visitors
 - often know the most about the issues and bills
 - know the schedule better than the legislator
 - are spokesperson and right hand of the legislator
 - are the ear of the legislator; what is said to them, is said to the legislator
- 5 Know the Legislator:**
 - Do your homework by reading the legislator's bio
 - Know their background: history in office or other elected positions, committees, bills sponsored, personal info

SOCIAL MEDIA TOOLKIT

#UWoFCapitolDays

IDEAS:

- 1 Before making an ALICE post for your community, know what you're advocating for in Tallahassee. Share your agenda and what you hope to accomplish. Tag #UWoFCapitolDays along with your legislators!
- 2 Recap your time at the Capitol with a fun Instagram Reel. Record short video clips to put together in Instagram. Share and tag #UWoFCapitolDays along with your legislators!
- 3 Share a post afterwards with photos of your team and any legislators you met with. Share a little about what you advocated for and save details for a blog post! Share and tag #UWoFCapitolDays along with your legislators!

Example Copy:

Pre-Event

🏛️ We're advocating for you at the United Way of Florida Capitol Days! From childcare to healthcare, housing to employment, we're addressing critical issues that matter to all of us.

💛 Help up inspire our lawmakers to create policies that uplift every Floridian.

#UnitedForChange #UWoFCapitolDays
#StrongerTogether #UnitedInPurpose

Post-Event

🗣️ Reflecting on an inspiring week at United Way of Florida Capitol Days! 🏛️ ✨

💛 Together, we raised our voices and ignited change for our communities. Our advocates championed important causes, from childcare and healthcare to housing and employment. By uniting our voices, we showcased the power of community-driven action.

🔗 Missed the action? Stay tuned for updates on the outcomes and how you can continue to be part of the change.

#UWoFCapitolDays #UnitedForChange
#CommunityImpact #UnitedInPurpose



CAPITOL DAYS

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DO

Use these Tips for Successful Legislative Meetings

When done correctly, meeting in person with elected officials and/or the staff of legislators is, by far, the most effective means of political advocacy. Here we share some crucial "do's" and "don'ts" to ensure your advocacy is successful and effective.

[Find Your Legislators Office](#)

Make an appointment in advance.

Time is currency with legislators. Contact the office in advance for a meeting in writing (email) and follow up by phone. Be clear about who will be attending and the specific reason for the meeting. Legislative schedules are unpredictable. Don't be put off if you are rescheduled or, if necessary, meet with staff instead.

Prep in advance.

Prepare carefully. Be thorough. Know your legislator: review past votes or statements on the issue, party position, and committee assignments. As a group, develop and agree on a clear agenda. Know talking points and make your case. Research opposition arguments. If possible, acknowledge and rebut these.

Stay on message.

Effective meetings should be narrow in scope. Stick to a single issue, state only a few key points supporting your position. Make a definitive request for action. Meetings are ineffective when participants stray from the talking points.

Go local.

Legislators want to hear thoughts and opinions from constituents. Because legislators can access national or state analysis, reports and statistics, a useful strategy is relating the issue and your position to your community. Provide local statistics and stories, and be the best source of rich information. Humanize the issue by tying it to your community or personal experiences.

Make clear, actionable requests.

Don't be timid or worry that it's impolite to make a direct request. Your meeting is to secure support. Asking is appropriate and expected. The key is to clearly articulate. Ask for something actionable. Be timely and in line with the legislative process. Asking for generic support isn't usually enough. For example, ask a legislator to co-sponsor a bill. Take the opportunity to evaluate the response.

Cultivate relationships with staff.

Don't underestimate the importance of legislative staff. Doing so is the difference between success and failure. Key staff play an invaluable role in shaping agendas and issue positions. Cultivate positive working relationships and, over time, staff will see you as a helpful resource on your issue/s.

Follow-up.

What happens after a meeting is almost as important as the meeting. Send a 'thank you' letter. Express appreciation and reinforce your message. Note any verbal commitments made by the legislator or staff. If you promised to get back in touch with additional information, do it. Failed follow-up calls your credibility into question. Also, report the results of your meeting back to UWOF. It is vital to coordinating overall legislative strategy and evaluating our advocacy impact. Even if the legislator does not support your request, follow up with a thank you because you are building a long-term relationship.

CAPITOL DAYS

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DON'T

Tips for Successful Legislative Meetings

Effective advocacy has great rewards, but it does require being mindful of not making any mistakes, large or small.

Don't engage in partisan critiques.

Keep to the merits of the policy or issue. Avoid characterizing positions in strictly partisan terms. You are working on behalf of an issue, not a party, and need legislators of both parties to support your position.

Don't use threats.

While it may be tempting to tell a legislator who rebuffed a request that "you'll never vote for him/her again" or that "you pay his/her salary," discourtesy ensures your arguments will be discounted – now and in the future.

Don't be late.

Time is a valuable and scarce commodity for legislators. Punctuality conveys professional and demonstrates commitment. Arrive early, especially if in a group, to allow a final review of the talking points and message.

Don't get too comfortable.

Don't be surprised by a courteous reception, especially from lawmakers who disagree with your position. As a constituent you are accorded respect by the legislator and staff. Don't mistake this for agreement or let the comfortable exchange deter you from making your request. Also, don't mistake "concern" for your issue with support.

Do not forget to follow-up.

Immediately send a thank you. Stay informed on your issue and track how your legislator responds. Did the legislator follow through on his/her promise? If not, request an explanation. If so, express your appreciation.



LEGISLATORS WANT TO HEAR FROM YOU

Meeting your legislator face-to-face, can be nerve-racking. Keep in mind that legislators, and their staff, repeatedly say the information nonprofits provide is important when making decisions. YOU bring something to the table.

Legislators are often...

- very eager to win your support.
- hoping to put their best foot forward with constituents.
- sincerely interested in getting constituents' views on legislation.
- aware you are a potential expert on your issue – you have information that the legislator needs.

UNDERSTANDING WHY TO MEET

There may be many reasons to meet with a legislator who is taking a leadership role on your bill – to thank the legislator for taking the lead or to learn how you can be helpful in developing support.

Meeting with your legislators may allow....

- them to share ideas or suggestions to help you focus your efforts on a particular bill.
- you to gauge their support or opposition to your position.
- you to become a resource to your legislator.

PLANNING FOR THE MEETING

Often, you know considerably more about your subject than your legislator does. Legislators will welcome information and appreciate any anecdotes or illustrations that spell out the impact on people in their districts.

You should know that...

- meeting in advance to prepare is a necessity, as is, appointing one principal spokesperson.
- your group must agree on the objectives for the meeting and the points to be addressed.
- more isn't always better - a delegation is effective but small meetings can allow for a detailed discussion and/or can foster frank comments about the dilemma the legislator faces in making choices on the issue.
- meetings in a district office may offer more time or flexibility.

AT THE MEETING

- Present your view with conviction, but don't put anyone on the defensive.
- Cover the issue from the legislator's perspective, tying it in with his or her past votes or interests.
- Listen attentively. Opening comments by the legislator often give clues about how to connect your issue with his/her concerns.
- Don't bluff – If you don't have the answer, say so and commit to follow up and do so.
- Give responses to arguments the opposition will raise, but don't degrade your opponents.

LEAVE BEHIND & FOLLOW UP

- Leave a fact sheet with a brief description of the issue, why it's important, and the action desired.
- Give a copy to the legislative aide as well.
- Write thank you that recaps any agreements reached and provides any promised information.



UNITED WAY of FLORIDA

CAPITOL DAYS

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60-Second Pitch

I am (Your Name) with United Way of (_____). We are here today with Florida's local United Ways for our annual Capitol Days event.

Our network, of 28 local United Ways representing every one of Florida's 67 counties, has joined together to promote action on issues impacting all our communities: Financial Stability, Housing Attainability, Behavioral Healthcare Accessibility and Childcare Affordability.

We are asking, you, our legislator/s to assist:

Invest \$1.8 million in state funding to match the \$1.8 million local United Ways bring to the table to enhance opportunities for free tax preparation and result in dollars flowing back into Florida's economy.

Focus on programs that incentivize construction of affordable rental units and support expanded access to home ownership.

Support efforts to expand behavioral healthcare access by increasing reimbursement rates and enhancing the behavioral health talent pipeline.

Support efforts to make childcare more affordable by increasing eligibility, creating incentives for private-sector investment and supporting state investment to increase access.

Thank you!

We are working for the health, education and financial stability of each and every resident in our community. Join us.

UNITED WAY of FLORIDA

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Sample Email Request for Meeting with Legislator

Dear Representative/Senator (**Last Name**),

Florida's local United Ways will convene for our 2024 Capitol Days next week. I am a team member representing (United Way of _____) and would like to request an appointment with you **next Wednesday (and/or add day/s as needed)**.

Also, from (**name of county or counties**), I have joining me on our team (**list each team member with their title/company**). The purpose of our meeting is to discuss **Financial Stability, Behavioral Health Accessibility, Childcare Affordability and Housing Attainability; and to seek your guidance and support for our United Way positions with these issues.**

We understand that you are extremely busy but would appreciate any time that your schedule permits on Wednesday, November 8, 1:30pm or later and before (list the time you will be leaving) or (list any other time you are available). If you are unable to meet, we would like to request a meeting with your legislative assistant (insert name).

Thank you for considering this request. We look forward to meeting with you.

(List your name and contact information)

**** Please schedule these meetings even if they conflict with Wednesday's Capitol Days programing, as the meetings are of the primary importance.*

Send this email just over one week out, and then follow up by phone.