

# **Cultural Humility and Tax**

## **Reducing Barriers and Connecting Communities**

2016-2017 Tax Season

# Objectives

- Increase understanding of cultural humility
- Apply concepts of cultural humility to the tax site
- Identify personal and professional opportunities for growth

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# What is cultural humility?



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# Cultural Humility

- A shift from cultural competency
- Being aware of our own values, practices & communication styles
- Being **aware of our own assumptions** about human behaviour, our biases, preconceived notions, personal limitations, etc.
- Active and **on-going engagement** with people who are different from ourselves in order to understand their values, practices & communication styles
- Developing relevant skills and practices **to work effectively** in cross-cultural situations
- Taking action in order to **create a respectful workplace** and community
- **A process**, not an end

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# Cultural Humility

## Three guiding factors

**Lifelong commitment to self-evaluation and self-critique**

**Develop partnerships with people and groups who advocate for others**

**Desire to fix power imbalances where none ought to exist**

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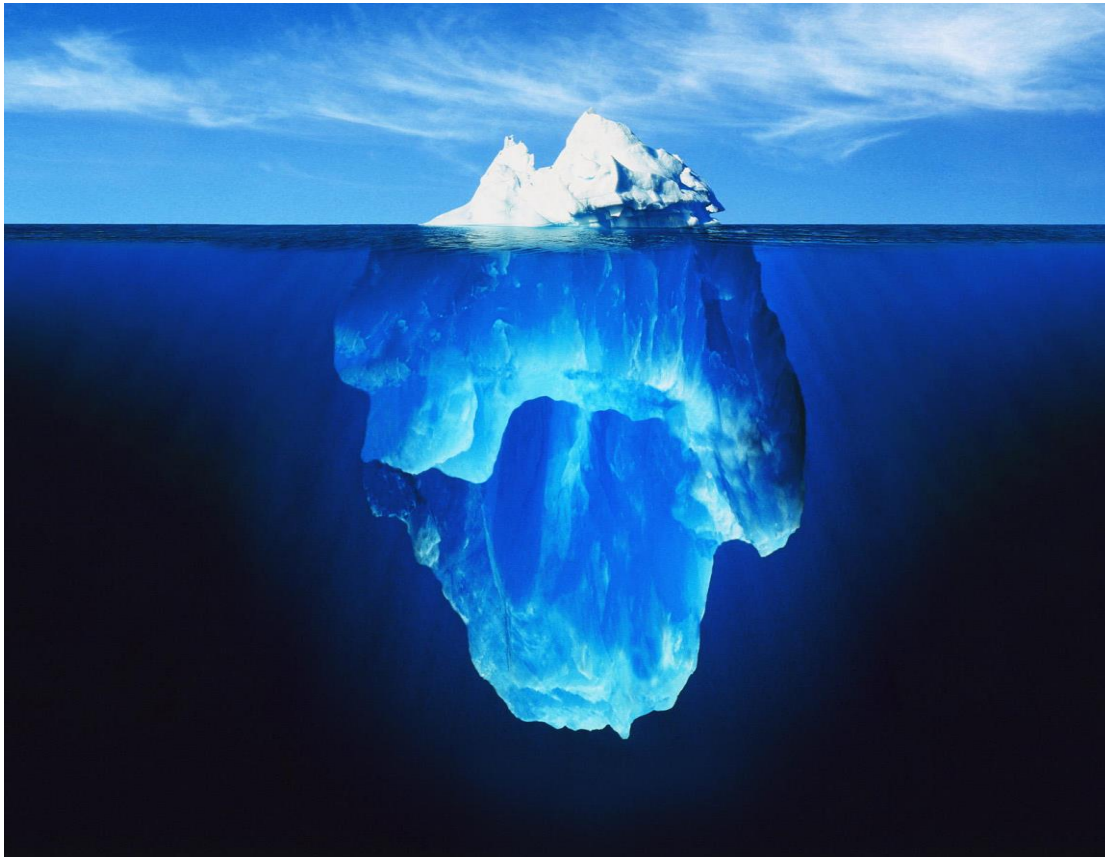


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# Cultural Humility and Diversity



What we see, observe, hear, and identify from others

- Gender presentation
- Estimate of age
- Assumption of race
- Proficiency in our language
- Size

What is invisible without further exploration, relationship-building, and cooperation

- Nationality
- Sexual orientation
- Religion
- Socioeconomic status
- Level of acculturation
- Ethnicity
- Politics
- Abilities
- Relationship to size/ body

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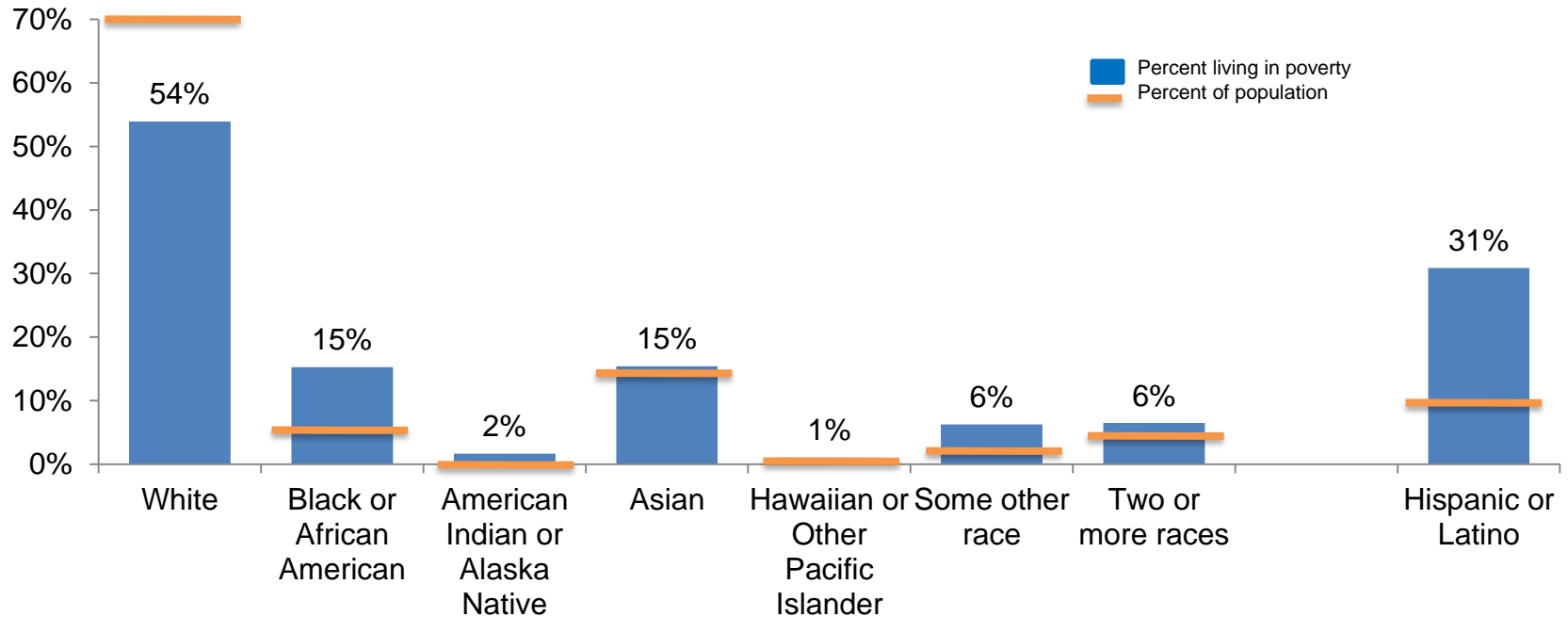
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# Why it matters: Systems of Inequality

- Poverty is not an individual failing— it is a systemic injustice.
- Structural forces embedded in our economic and political systems perpetuate inequality.
- Poverty disproportionately impacts those who traditionally experience oppression.

# Why it matters: Disparities in King County

2009-2013



Data source: American Community Survey, 2009-2013 5 Year Estimates.

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# Why it matters: Clients love volunteers

“I had more complex taxes this year than I've had before. The people helping me were very professional and I appreciated the way they treated me. It made the process less scary and helped me get it completely taken care of in less than an hour. Incredible service. I'm so glad that it was available.”

“I have anxiety regarding forms and financial matters. It is a huge relief to have someone help me with this task. This year, as in years past, a warm, friendly volunteer expertly assisted me with my taxes and filing. I feel very confident using this service and intend to use it every year.”

“This free tax service is a real act of kindness for those of us who can't conceive of tackling the forms. I am very grateful as well for the friendliness and competence.”

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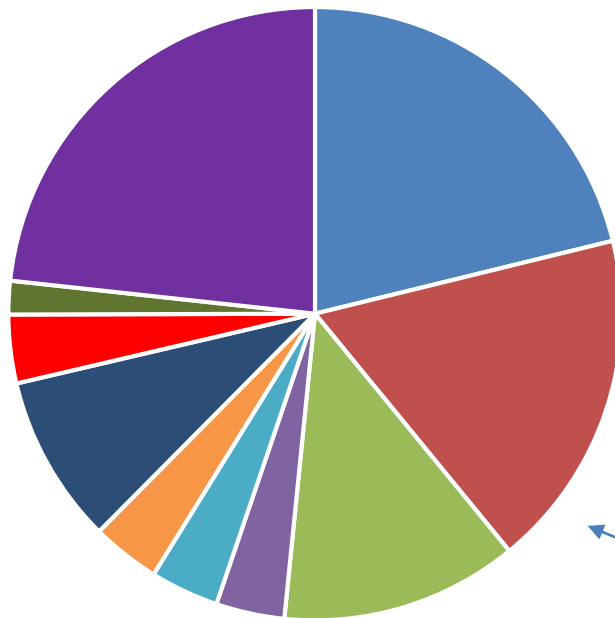


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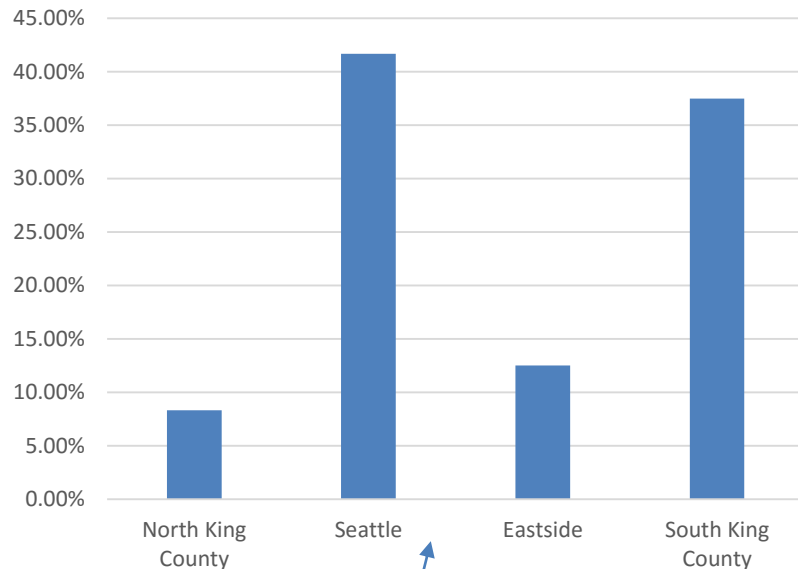
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# And...



- Spanish    ■ Mandarin    ■ Cantonese    ■ Arabic
- Russian    ■ Tagalog    ■ Vietnamese    ■ Hindi
- Swahili    ■ Other



Volunteers

Sites

Clients

- Age range: 16-93
- Living situation: 2% homeless
- 100 different languages spoken
- 25% lack a checking account

# Group Exercise

- Find your group
- Read your scenario
- Answer the following questions as a team:
  - How do you plan to support this person at the tax site?
  - What do you know about the person in your scenario?  
How do you know it?
  - What tax site role do you think your person fills? (Vol, staff, client, host)
  - Do your answers to these questions help you in your tax site role? Hinder you?

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# Group Debrief



- Thoughts
- Reactions
- Challenges

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# Humility and Power

- Humility provides a **framework for growth**.
- The **value of each person** in each interaction cannot be measured.
- Ceding power yields **increased cooperation**.
- Recognizing that cultural humility moves beyond individualism.



# Humility and Tax Prep

- Adds value to the tax site experience
- Alleviates stress of being an “expert”
- Contributes to a more intentional and effective program
- Improves relationships

## Tax Teams



## Cultural Humility

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# Group Exercise

- Rejoin your group
- Brainstorm ways that you can practice cultural humility at your site
- Record 4-6 answers on the large sheet of construction paper

# Cultural Humility Key Points

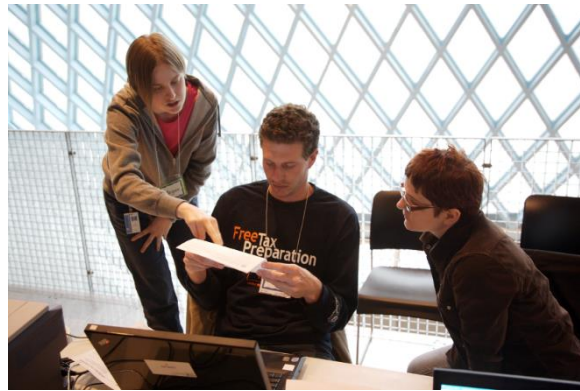
- We must work to stay humble and flexible.
- We should be able to say what we don't know.
- We never arrive at a point where we are done learning.





# Cultural Humility at the Tax Site

- Our clients are the experts on their own lives and situations.
- We hold a body of knowledge that the client may not, but the client also has an understanding outside the scope of ours.
- Collaborate and learn from one another.
- Avoid advice-giving and judgment



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# Cultural Humility and Social Justice

- CH and SJ are lenses that cultivate self-awareness.
- SJ as a point of view:
  - Equitable economic, social, and political rights and opportunities for all
  - Applied to structural and individual experiences
- Each perspective strengthens our work at the tax site.

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# Local Resources

- Seattle's Race and Social Justice Initiative: reports, goals, surveys
- The People's Institute: racial equity trainings
- European Dissent Facebook Page
- Coalition of Anti-Racist Whites: Seattle Chapter
- Nonprofit Anti-Racist Coalition: meets every 2<sup>nd</sup> Thursday of the month (usually in Montlake)
- She's With Me: online calendar and resource guide for feminist events/ ideas
- Gay City: Seattle's LGBTQ Center
  - Health, legal, education, DV, and more services/ resources
- UWKC:
  - WAAR
  - Diversity, Equity, and Inclusion Advisory Committee
  - POC group
  - Stevie: [skimmet@uwkc.org](mailto:skimmet@uwkc.org)

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# Text Resources

- Paulo Friere: *Pedagogy of the Oppressed*
- bell hooks: *Teaching to Transgress*
- Peggy McIntosh: “White Privilege: Unpacking the Invisible Knapsack”
- Tervalon & Murray-Garcia: *Cultural humility versus cultural competence: A critical distinction in defining physician training outcomes in multicultural education*
- Nieto, Boyer, Goodwin, Johnson, & Smith: *Beyond Inclusion, Beyond Empowerment*

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# Media Resources

- Network of blogs: <http://itooamwu.tumblr.com/blogroll>
- The Body is not an Apology webpage
- White ally learning:  
<http://itooamwu.tumblr.com/tagged/educational-resources>
- Self Care Zine (tumblr with regular resource posts)
- Podcasts:
  - Intersections
  - Hella Black Hella Seattle
  - Bad with Money
  - Politically Re-Active
  - 99% Invisible

## To learn more about CH:

Tervalon, M. & Murray-Garcia, J. (1998). Cultural humility vs. cultural competence: A critical distinction in defining physical training outcomes in multicultural education. *Journal of Health Care for the Poor and Underserved*, 9, 117-125.



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