



Stimulus Payments Outreach

Training Reference Guide

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Importance of Economic Impact Payments ("Stimulus Checks")

- What are Economic Impact Payments ("Stimulus Checks")?
 - Temporary tax credit - \$1,200 for adults and \$500 for dependent children
 - Non-taxable money that doesn't affect benefits eligibility
 - No minimum income needed to get the payment
- Why Economic Impact Payment Outreach is needed
 - Automatic payment delivery misses some people
 - Up to 12 million do not receive automatic payments (CBPP has a research paper on these [12 million non-filers](#))
 - People might have questions that prevent them from signing up
 - What if I don't have a permanent address?
 - What if I don't have an email address?

- What if I don't have a bank account?
 - Need clarification about process
 - May need help completing the form
 - The IRS form is difficult for people who lack access to the internet, aren't tech savvy, or aren't familiar with tax terms
- Who are Economic Impact Payment Non-filers?
 - Very low income
 - Non-elderly
 - People of color
 - Adults not raising children in the home
 - Youth aging out of foster system, low-income students, people with disabilities, people with adult children
 - Lack secure housing
- Getting Started
 - Connect to partners and help: People will need support filing taxes, completing the Non-filer online form, troubleshooting in tricky situations
 - Direct people to other resources
 - Figure out your role and what you can offer: Can you assist, refer, or notify?

Stimulus Payments Outreach Resources (Links)

- Research
 - [Aggressive State Outreach Can Help Reach the 12 Million Non-Filers Eligible for Stimulus Payments](#)
 - TANF Agencies
 - SNAP Agencies
 - Medicaid Enrollees
- Guides
 - [Getting Started with EIP Outreach](#)
 - [A Guide to Stimulus Payments](#)
- Materials
 - a. [8.5 x 11 Informational Flyer](#) (Available in English, Spanish, Chinese, Vietnamese, Tagalog, Korean)
 - [Social Media](#) (graphics and posts)
 - [Press Release Template](#)
 - [Blog Template](#)
 - [Sample Website Text](#)
 - [Talking Points](#)
 - [Email Templates](#)
 - Resources to Support [State Agency Outreach](#) (scroll to bottom of page)

Resources for State Agencies

- 9 million of 12 million non-filers participate in TANF, SNAP, and/or Medicaid, so state agencies have a particularly important role
 - Encourage state agencies to participate in outreach
- Campaign messaging emphasizes why they should use the IRS Non-filer form
 - "Get \$1,200 for what you need most" – makes it tangible
 - Compelling visuals that are relatable
- Toolkit Assets – available in English and Spanish
 - Key messaging

- FAQ
- Talking points
- Flyers and one-pager
- Template web copy, e-newsletter copy, email copy, SMS copy
- Call center script
- PSA script
- Radio reader
- Radio spot
- Videos (at :30 and :15)
- Animated digital banner
- Social graphics/posts
- Sample state agency campaign (carry out before Oct. 15)
 - July: partner/agency outreach, upload web copy, launch event, publish news release, distribute radio reader
 - August/September: Connect with non-filers via multiple social posts, emails, SMS, mail, place op-eds
 - October: Final push with earned media and paid support behind banners and radio spot

211 Economic Impact Payment Helpline from United Way Worldwide

- 211 is a vital community service accessed by millions of Americans
 - Assists with food, housing, utilities, payment assistance, mental health, etc.
- The 211 Economic Impact Payment Helpline provides over-the-phone assistance to help anyone obtain their payment
 - Helpline agents confirm eligibility, share how to claim the EIP, help callers complete the form, and answer specific EIP questions
 - Agents have technical training on tax questions (VITA certified) and will also screen people to see if they are eligible for EITC or CTC
- How it works
 - Can access through 211 or direct line (1-844-322-3629)
 - Starts with a bot that answers most questions
 - Connects with an agent for questions the bot can't answer
 - Answers 90% of calls within 90 seconds, available 24/7
 - Live agents available 9am-6pm M-F ET through October 15, 2020
- Other resources
 - [Outreach toolkit for EIP Helpline](#) (postcards, social, email templates)
 - www.unitedway.org/stimuluscheck
 - Landing page for individuals with general COVID-19 info and resources
- Key learnings from digital outreach
 - People are hungry for EIP information
 - 24m impressions in 3 weeks
 - 50k+ page views per week
 - “Stimulus Check” performs better than “Economic Impact Payment” based on A/B testing

GetYourRefund.org from Code for America

- Project of Code for America, a San Francisco nonprofit that partners with government to improve delivery of public services through human-centered design
- Developed a program to expand VITA through digital services

- Original pilot goals
 - 5,000 returns
 - Reach new high-need clients
 - Partner with 4 VITA sites
 - Improve efficiency of VITA
- COVID-19 created a new opportunity to expand program further
 - Huge population of people to help, needed more capacity and service offerings
 - Different levels of service
 - VITA location finder
 - Valet VITA
 - Digital intake
 - DIY with help
 - Service routing
- Full-Service VITA
 - Safeguards client data through identity verification (check ID with “selfie”)
 - Still recruiting VITA sites – here’s what you need to partner:
 - VITA-volunteers
 - Laptops
 - Current software
 - Digital outreach plan
 - A flexible can-do spirit
 - Ask 1361-C questions
 - Allow to securely upload tax docs
 - VITA preparers use Zendesk – very similar to regular VITA but online
- Initial results
 - 9.5/10 clients would recommend it to a friend
 - Human connection of VITA is maintained
 - Scaling up very quickly, reaching new clients
 - 4 450 returns, 7000+ DIY, 350 000 visitors (as of June 23)
 - Reaching new clients
 - 33% were looking for help with prior years
 - 34% learned from source other than VITA site
 - 18% heard about the site from a friend or family member
 - 12% came to site not expecting to file
- Currently have 34 active partners, 22 in training (as of June 23)

Boston Tax Help Coalition

- Serve 13,000 annually in the Boston area as a part of Boston Mayor’s Office of Financial Empowerment
- Created an EIP Hotline so people could get info they needed on stimulus
 - 16,873 calls as of June 22, 2020
 - 6,136 voicemails left
 - 46 volunteers and staff responding to calls
 - 1,334 people didn’t receive stimulus payment
 - 156 payments went to wrong account
 - 65 need address change
 - 254 people didn’t receive payment for dependents
 - 263 people needed help with Non-filer form

- Hotline process
 - Used a program called grasshopper to route calls
 - Been slammed with service, largely questions about when payment will come
 - Original goal was to reach non-filers (especially people experiencing homeless), however, they are a small portion of callers
 - Trying to make sure everyone can get non-predatory bank accounts
 - Walking people through the process, or did it for them with permission
 - Spanish and Portuguese volunteers
- Committed to banking people
 - Partnership with BankOn – if people call and don't have bank accounts, help them get bank accounts so they can complete the IRS Non-filer form
- Over the phone Non-filer form help
 - Walk callers through the process or fill out the form on their behalf if requested
 - Helpful for people without a computer or internet access
- Takeaway – huge need for more information
 - Callers from all over the state
 - The only helpline for the state
 - Will be doing this into the fall

Angel Resource Connection

- Nonprofit serving food, clothing, and housing to unsheltered in Seattle area
- How it started
 - Asked people serving if they had signed up for their stimulus check, many didn't know what it was
 - Other local agencies didn't jump in to help, so they did
- Have signed up hundreds of homeless people for the EIP
 - Media caught attention to work and gave coverage
 - Started getting calls from across the country with people wanting to learn how to help homeless with stimulus payments
 - Initially, public defenders volunteered to sign up
 - You don't need to convince anyone – you need to have enough people there to sign people up for the payments
- Challenges
 - Most don't know they qualify because they haven't worked or filed taxes
 - When you tell them, "You will get this money," it's like winning the lottery
 - Most don't have an email address
 - Most don't have a mailing address
 - Libraries closed – no internet access
 - Keeping safe in the face of COVID-19
- A lot of people experiencing homelessness stay in hotels and other areas
 - People are grouped together and hoping for services to come to them since most doors are closed
 - If you set up a table and chairs, they'll line up
 - Find out where they are in motels—contact Salvation Army
 - They're happy to see this service and they want the opportunity to get this money
- Solution
 - Need a designated person to create social distancing, provide masks for people

- Set up cones, have them fill out a form with basic info first – name, email address, if they receive SSI
 - Volunteers can scan form to see if they'll already get one deposited through SS
 - If they don't have an email address, will take longer
- Secure mailing address for unsheltered
 - Angel Resource Connection asked two local organizations to accept mail for unsheltered
- Process takes 25 min on avg, or 40 min or more if they need an email address
 - Time-consuming, so good to have a group of volunteers
- Results
 - Personal interactions bring humanity
 - One of the most impactful kinds of outreach you can do

Other Questions

1. Is GetYourRefund available in different languages?
 - a. Spanish version just released
 - b. There is a work around to support people in other languages once they get through initial intake
2. Is the EIP helpline available in different languages?
 - a. The automated responder is only in English, but some of the live agents speak Spanish
3. How many years can VITA go back and file for clients?
 - a. Can go back three years, but it's easier outside of tax season
4. How do we reach people who don't have online access, especially those who are homeless?
 - a. You can make your phone a hotspot and connect to laptop to have Wi-Fi anywhere
 - b. Boston Health Care for the Homeless and other shelters brought folks in one by one through case management
 - i. Checks came directly to Healthcare for the Homeless
 - ii. Trained some advocates from the homeless shelter in Harvard Square, they assisted their clients directly
 - iii. Partner with homelessness orgs that are willing to go the extra mile for their clients
 - c. Even with libraries closed, some libraries have extended Wi-Fi to their parking lots. Look at public Wi-Fi spots
5. Will there be hashtags for social media posts?
 - a. For state agency resources, there will be sample copy accompanying graphics that will include hashtags
 - b. If there are existing hashtags in your states, incorporate those as well
6. Does the 211 EIP Helpline help people file their Non-filer form?
 - a. Helpline agents do not file the form for people to follow IRS guidance
 - b. Helpline agents can help with questions and guide callers through the form process
7. Can the 211 helpline answer state tax questions?
 - a. The MyFreeTaxes helpline is better for specific tax questions

8. Is there a list of addresses where the unsheltered can receive their payments?
 - a. To our knowledge, there is not. This is why it's important to have partnerships locally – you may learn of orgs that are allowing use of their address
9. Bryndan, are you open to a partnership to provide additional language support for the EIP Helpline?
 - a. I'm very open to conversation!
10. To fill out the Non-filer form, you need to input an email address. Is there any chance the IRS will contact the filer using the email address? This is a particular concern for unsheltered people.
 - a. After filling out the Non-filer form, you'll get a confirmation email if submitted successfully. If it isn't done correctly, you may also receive an email.
 - b. Fortunately, many homeless have an "Obama phone" with internet access

Points of Clarification

- Oct. 15th is the deadline for Non-filer form for 2020
 - You can file 2020 taxes and receive the EIP at a later date
 - Unfortunately, we don't know if the IRS will put out another Non-filer form in 2021
- Eligibility for the EIP is based on three requirements:
 - Income under \$75000 for the full amount
 - SSN
 - Can't be claimed as a dependent
- People serving people directly may be able to provide more direct support over the phone. The difficult thing is providing a signature.