



Tax Time Thursdays with National Disability Institute & United Ways of California

Outreach to People with Disabilities Notes

March 9, 2023

Presented by the Center on Budget and Policy Priorities' Get It Back Campaign

Presenters:

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Boost Capacity to Serve Taxpayers with Disabilities

Michael Roush

- Background
 - Research shows a lack of take-up in tax credit claims by people with disabilities
 - 1 in 5 people have a disability – a wide variety of disabilities exist, including hidden disabilities such as visual and audio impairments, learning disabilities, mental diagnoses, health conditions like cancer, and more
 - National Disability Institute (NDI) is a national nonprofit working to build economic security for people with disabilities
 - Creates resources to help VITA programs increase outreach and services to people with disabilities
 - Provides information to make it easier for taxpayers with disabilities to navigate the tax filing process
 - Can help connect organizations with [local partners](#)
 - One story: during stimulus payments and expanded Child Tax Credit outreach, found that 300 people in a mental health facility were eligible for free tax prep services and did not know it. They had not filed their taxes for over 3 years, thus losing out on potential tax credit funds
- Resources
 - [Tax & Tax Preparation](#): includes links to reference guides, webinars, and other resources for outreach
 - [Resources for Taxpayers with Disabilities](#): includes links to info on ABLE accounts, managing money, medical benefits, and SSA Disability programs

- Resources to help ensure your free tax prep site is accessible to all:
 - [People-first language](#): put the person over their disability, don't use negative terms or stereotypes
 - Help with finding a [sign language interpreter](#)
 - [Why ask the disability question?](#) Volunteers may be uncomfortable asking about this question on tax forms, and this resource can help overcome that
 - [Disability Question Script](#) can further help volunteers who may be unsure of how to approach this question
 - [Making an Accommodation Request & What is an Accommodation?](#)
- Additional Resources:
 - [Quick Reference Guides](#) for a variety of topics
 - [Outreach Toolkit](#) for organizations that includes flyers, social media posts, etc
- [Financial Inclusion Essentials training](#): available from AFCPE to help organizations strengthen how they build the financial well-being of people with disabilities

Jafet Diego

- Background
 - United Ways of California helps with tax outreach overall, including state level tax credits
 - Work with partners in state to provide free tax prep and run MyFreeTaxes.org which provides free tax prep in CA
- Intentional accessibility-related strategies used by United Ways of California:
 - Internal approach:
 - Looked through materials to see what could be improved
 - Informed & trained staff on approach to outreach to people with disabilities
 - Took financial Inclusion training from AFCPE → helpful to field questions from clients
 - Shared information and lessons learned with state partners
 - External approach:
 - Created more inclusive website materials
 - Curated content specifically to highlight nuances for taxpayers with disabilities
 - Highlighted state's ABLE accounts
 - Held an Instagram live with NDI
 - Combination of ABLE accounts and free tax prep messaging is helpful for spreading the word on both relevant issues
 - One story: a caller reached out last year on behalf of her son with a disability. She was disappointed that they weren't told about his eligibility for stimulus payments (and that he needed to file taxes to get them) and felt that "nobody cares about us."
 - Some organizations might question whether they have the capacity and appropriate knowledge to promote inclusive and accessible practices
 - Having internal conversations about equity and intentionality with your team is important for ensuring everyone is on the same page

Outreach & People with Disabilities: Key Takeaways

1. There are many types of disabilities. Some people have hidden disabilities, so don't make assumptions. **The Americans with Disabilities Act states that an individual who has a physical or mental impairment that limits one or more life activities is regarded as having a disability.** This is a broad group that could include an individual with down syndrome, an individual with cerebral palsy, an individual who is blind or low vision, an individual who has a learning disability, or an individual who has a mental health diagnosis.
2. Partnerships are essential! Partner with your local government offices, colleges, and community disability organizations (among others) to share strategies and resources, troubleshoot, and gather knowledgeable volunteers. They can help support you and your team, and they can also help spread the word about VITA site accessibility.
3. Help dispel myths about taxes and disability benefits in your materials and outreach efforts. The primary concern is that many believe receiving tax credits will change their eligibility for benefits. A person has [12 months](#) to spend those funds before they are considered in benefits eligibility. In addition, some available benefits do not use financial need as an eligibility requirement.
4. Use widely available resources if you have low capacity or are unsure how to start intentionally inclusive outreach efforts. [The National Disability Institute](#), [IRS SPEC](#), [regional ADA centers](#), and community-based organizations have existing resources that are free to use. Flyers, social media, and text campaigns can be particularly useful. One example of a unique resource is the [Sacramento-area Community Connect/eBus](#), which offers a bus outfitted with computers and broadband service that organizations can rent. In addition to offering mobile VITA sites, some groups use the busses for financial education, job training, and disaster response assistance.
5. Develop an internal and external strategy for enhancing our outreach efforts to serve people with disabilities. Surveys have shown that volunteers may be uncomfortable talking to taxpayers about disabilities and need more information to feel more confident. Staff trainings, related resources, and internal discussions can help overcome that. Even small efforts, such as sharing an "inclusivity tip of the day," can help!

Audience Insights

- "Connect with groups that are providing Medicaid waiver services and meals on wheels to reach homebound clients."
- "Partner with your Center for Independent Living to see if they would be open to having you come to them once a month to provide tax preparation."
- "One thing we do is present to and train care coordinators for a statewide program serving families who have children with special health care needs. We also learn from those care coordinators about what simple tax referral is like for them, and how to increase their comfort level in talking about tax as they screen and refer for social needs."
- "We partner with the City of Houston's Mayor's Office for People with Disabilities. They provide the ASL interpreters."