

Virtual Training Series

Texting & Tax Credit Outreach

Center on Budget & Policy Priorities

August 4, 2016

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Florida*

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Prepare + Prosper

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Tarrant County*



The Get It Back Campaign

- National effort to connect eligible workers to tax benefits
- Promote the Earned Income Tax Credit, the Child Tax Credit, free tax preparation, and other tax benefits
- Work with a network of diverse partners
- Provide outreach tools, trainings, and resources to help you link eligible workers to the tax credits and free tax help

www.eitcoutreach.org

Virtual Training Series

- Features the expertise of campaign partners in the field
- Focuses on specific outreach strategies and skills that you can begin to apply to your work immediately

Why Texting and Outreach?

- Most Americans use a cell phone
 - Nearly two-thirds of U.S. adults own a smartphone, and 90% of all American adults own a cell phone
 - 84% of American adults earning less than \$30,000 in 2014 owned a cell phone
 - On average send or receive more than 40 texts per day



Benefits of Texting in Outreach

- Instant
- Doesn't require an internet connection
- Easy to retrieve
- Short and informal



Our Presenters



**Anamaria
Ceballos**



Christine Hazuka



Sue Matkin

Hispanic Unity of Florida

Our Mission

Empowering immigrants and others to become self-sufficient, productive, and civically engaged





HUF VITA Program

Over the past 13 years, Hispanic Unity VITA sites have served

44,184 clients and brought back
\$56.6 million to the community
over **800** volunteers

An advertisement for the "Taxes Easy Free" program. It features a photograph of a diverse family of five (two women, two men, and a child) smiling. To the right of the photo, the text "Taxes Easy Free" is displayed in large, colorful letters. Below this, it says "Prepared by IRS Certified Volunteers". Further down, it provides contact information: "For more information call 2-1-1 or 954-537-0211" and the website "www.VITATaxesFree.org". At the bottom of the advertisement, there is a row of logos for partner organizations: Children's Services Council of Broward County, Hispanic Unity of Florida, United Way, Broward County Florida, Community Action Center, Broward 2-1-1, and HealthOn.



Tax Season 2016

5,744 Clients served

\$6.3 Million in tax returns

Taxes Easy Free | Prepared by IRS Certified Volunteers

For more information
call 2-1-1 or 954-537-0211
www.VITATaxesFree.org

Children's Services Council of Broward County
HISPANIC UNITY of FLORIDA
United Way
BROWARD COUNTY
Community Action Center
Broward 2-1-1
Hands On Broward

HUF VITA Volunteers 2016



- Over 100 Volunteers
- 50 hours of tax law theory and application training
- VITA training lead by eight tax law instructors

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Children's Services Council
United Way
Broward County
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Hands On



Volunteer Communication Challenges

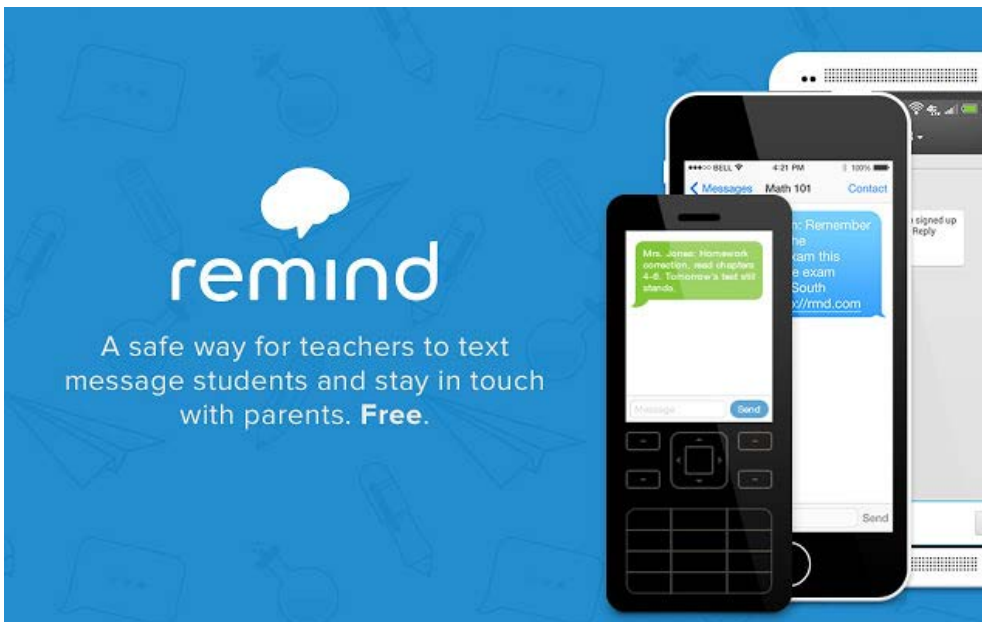
Ways to communicate	Strengths	Weaknesses
Phone call	<ul style="list-style-type: none"> • Oral communication • The message is delivered instantly • The message is clear 	<ul style="list-style-type: none"> • Requires the caller's immediate availability • Calls and voicemails can be ignored. • Calling a group of people one by one is time consuming.
E-mail	<ul style="list-style-type: none"> • Does not require the immediate attention of the correspondent • Ideal for individual or group communications. • Accessible on both mobile and fixed computing device. 	<ul style="list-style-type: none"> • Requires a data connection • Can be easily tagged as spam and discarded. • Can be easily dismissed or be read several days later.
Text message	<ul style="list-style-type: none"> • A text message happens in real time • Does not require the immediate availability of the correspondent • Available both on smartphones and feature phones. No data connection required. • Ideal for individual or group communications • Accessible on both mobile and fixed computing device. 	<ul style="list-style-type: none"> • Content: Something that is appropriate to put in an email might not be appropriate in a text, and vice versa. • Texting, is designed for succinct messages that fit onto a small screen. • Texts are not easily followed as back-and-forth correspondence, so they serve as a poor record for follow up purposes, and most phone services delete texts after a certain period of time

Solution



This tool can be operated by the teacher or instructor.

Groups can be created and deleted easily. Each group has a unique code and can be customized with a specific icon.





Communicating with VITA Volunteers

- Message delivered instantly
- All types of documents can be attached to the message
- Accessible on all communication devices: simple phones, smartphones, computers. No data connection required
- Requires the correspondent to sign up, thus avoiding the message being tagged as spam
- Provides different ways of signing up
- Provides ways to easily create groups of people
- Can be operated by more than one person and on different devices: mobile or fixed
- Privacy protection for both parties engaged in the communication

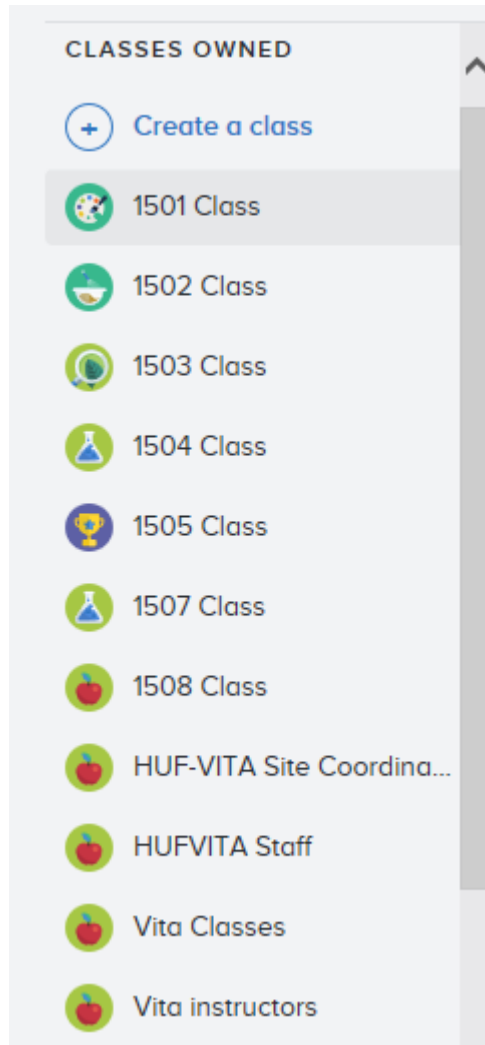
Taxes Easy Free Prepared by IRS Certified Volunteers

For more information
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Children's Services Council
HISPANIC UNITY of FLORIDA
United Way
BROWARD COUNTY
Community Access Center
2-1-1
Broward of 2-1-1
Get Connected. Get Answers.
HuskieOn



Benefits




- The volunteer is doing the work of adding himself and the operator can monitor the addition through the app on a mobile phone.
- The message can be sent to one person. There is no length limitation for the message and attachments are allowed.
- The message can be addressed to a group. There is a length limitation which is of 140 characters, but the message can be spread on multiple announcements. Attachments are also possible with the announcement.
- The privacy of the operators and the participants is protected as the phone numbers are hidden from both parties.
- When a participant receives a message, he/she only sees the local phone number of the communication tool. In return, the operator sees only the name of the participant.
- Different actions can be performed by a participant. The system is very flexible and offers different options.





Result

Option 1

 **1501 Class**
@1501cl

WAYS TO ADD PEOPLE


-  In-person Instructions
-  Phone or email contacts

Enter phone numbers or email addresses





Enter contact information in the space provided. You can also copy and paste from a spreadsheet. Want to watch how?

Full name	Email address or phone number
Jane Doe	name@email.com

Option 2

 **1501 Class**
@1501cl

WAYS TO ADD PEOPLE

-  In-person Instructions
-  Phone or email contacts
-  Share a link
-  Printable PDFs


Share this link any way you like!

This link includes your class code, so anyone who has it can join your class instantly.







remind.com/join/1501cl

Option 3

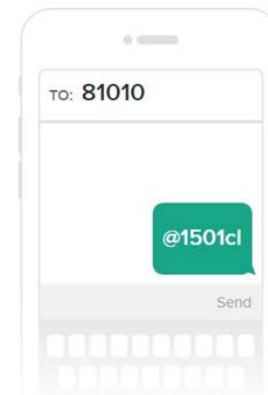
 **1501 Class**
@1501cl

WAYS TO ADD PEOPLE

-  In-person Instructions
-  Phone or email contacts
-  Share a link
-  Printable PDFs

Tell people to text @1501cl to the number 81010

They'll receive a welcome text from Remind.
If anyone has trouble with 81010, they can try texting @1501cl to (954) 874-8771.



Lessons Learned



- **206** volunteers were invited to communicate through Remind
- **46%** VITA volunteers responded positively or accepted to be contacted through text message
- HUF VITA team could instantly send important information to volunteers via text message.

Example:

- We needed additional volunteers at a specific VITA site, and sent out a text message. The text was viewed by volunteers within mere minutes, if not seconds, of being delivered.
- Through the text message **60%** of volunteers responded. The same message was sent via email and only **10%** of the volunteers responded.

Taxes Easy Free | Prepared by IRS Certified Volunteers

For more information
call **2-1-1** or **954-537-0211**
www.VITATaxesFree.org

Children's Services Council of Broward County | Hispanic Unity of Florida | United Way | Broward County Florida | Community Access Center | Broward 2-1-1 | Hands On Broward

Thank You

Anamaria Ceballos | Program Coordinator - VITA and Small Business Services

5840 Johnson St. Hollywood, FL 33021

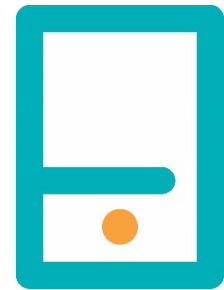
PH: 954.342.0428 | **Cell** 954.618.7284 | **Fax** 954.964.8646 | **Email**

aceballos@hispanicunity.org



PREPARE + PROSPER

ST. PAUL, MN



Christine Hazuka
Outreach coordinator

PREPARE + PROSPER



AGENDA

- Overview of Prepare + Prosper
- Why texting?
- Content of messages
- Texting software platform: Trumpia
- Challenges + successes

PREPARE + PROSPER

Run and promote programs and policies that foster financial health and wealth

- Free tax preparation
- Tax-time financial services
- Financial coaching
- Claim it! campaign
- FAIR initiative
- Policy change work



PREPARE + PROSPER

- 550 volunteers
 - 14,000 taxpayers
 - \$27 million in refunds
 - \$1.9 million saved
 - 60 participants enrolled in financial coaching program, Money Mentors
 - Work with 13 orgs across MN who operate 20+ sites
-



WHY TEXTING?

- Diversify our outreach tactics + strategies
- Texting supports other communication methods
- Grow our newer programs
- Cross promote messages
- Maintain year-round relevance





HOW TO JOIN

- At the tax clinic through financial manager (25-30% of our 14,000 customers)
- Based upon what they would like to learn about
- Keyword sign-up



CONTENT OF MESSAGES

- Recruitment for P+P programs + events
- Tax tips + deadlines
- Savings nudges
- Community events when applicable

TEXT EXAMPLES

- **Tax tip:** Have prior year returns or property taxes? We are doing taxes for free June – Oct. Call 651-262-2150 to schedule an appointment
- **Tax tip:** Parents – keep your receipts for your kids' school supplies for tax time savings! Learn more at www.youclaimit.org/k12
- **Recruitment text:** Stretch your savings and work with a volunteer financial coach through our Money Mentors program: www.prepareandprosper.org/moneymentors
- **Savings nudge:** The average holiday shopper will spend \$107 this Black Friday. Consider saving for unexpected expenses instead!

TRUMPIA

- Hosted online through website
- Send messages
- Appointment reminders for Money Mentors (financial coaching)
- Multi-channel voting
- Yes/No response
- Keyword signup

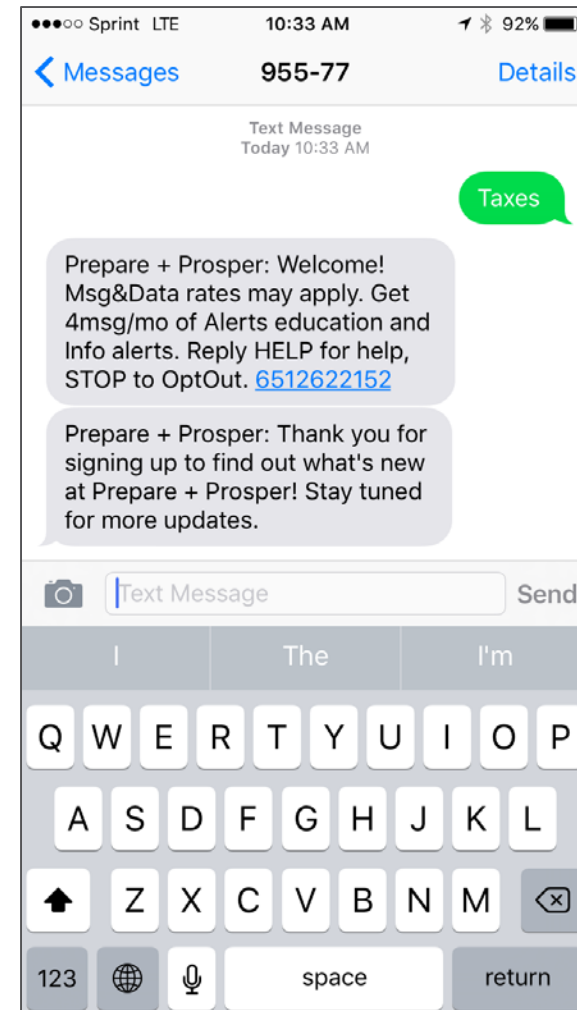


SEND MESSAGES FUNCTION

- 123 characters
- Shortened link
- Also be sent as emails

KEYWORD SIGNUP FUNCTION

- Taxes
- Piggybank
- MoneyMentors



PREPARE + PROSPER

CHALLENGES + SUCCESSES

- Length
 - Not everyone has a smartphone
 - Quick
 - Metrics
 - Some websites are not mobile friendly
- Additional touch point to reinforce messages
 - Year-round presence
 - Retention rate and show rate at events
 - Quick way to get a sample survey of subgroup
 - Relevant – everyone does it!

Christine Hazuka

outreach coordinator

Prepare + Prosper

christine@prepareandprosper.org

651-262-2151



Texting with VITA

Using Technology to Reach Potential VITA Clients

Sue Matkin, VP Community Development
United Way of Tarrant County

EARN WELL

**United
Way**



The United Way of Tarrant County **Financial Stability Initiative**

United Way
of Tarrant County

Earn Well Initiative

Four Interrelated Strategies:

- VITA (Income Support)
- Skills Based Job Training
- Financial Coaching
- Adult Education (GED & ESL)

Getting Started

- Were looking for a creative new way to reach potential VITA clients
- Almost everyone has a cell phone
- Almost everyone utilizes texting

Finding Out About This Service

\$300
VALUE

FREE TAX CENTERS

\$300
VALUE

With this coupon, you will be able to get your income tax return prepared and filed by an **IRS-certified tax preparer** for **FREE** if your combined household income is \$50,000 or less.

Bring the following with you:

- Tax information such as W-2, 1099, or 1098
- Social Security Card or ITIN letter for you and all persons on your tax return
- Proof of identity (Picture ID)



To Find the Location Nearest You & Learn More
FreeTaxesDFW.com • Call 2-1-1 (option 1)
Text your zip code to 444999



VALOR DE
\$300

CENTROS GRATUITOS PARA IMPUESTOS

VALOR DE
\$300

Con este cupón, usted podrá tener su devolución de Impuesto sobre la renta debidamente preparada y enviada por **un especialista en Impuestos certificado por el IRS gratuitamente** if your combined household Income is \$50,000 or less.

Tralga lo siguiente:

- Información sobre los Impuestos como la W-2, 1099, o 1098
- Tarjeta del Seguro Social o una carta ITIN para usted y todas las personas dentro de su devolución de Impuestos
- Prueba de Identidad (Identificación válida con foto)



Para encontrar una ubicación cerca de usted y saber más
FreeTaxesDFW.com • Llame al 2-1-1 (opción 1)
Mande un mensaje de texto con su código postal al **444999**

Process

1. A user texts their zip code to the number on the coupon
2. They receive a link to the map
 - There are 14 sites across Tarrant County
3. User can access the website www.FreeTaxesDFW.com to learn more

Partnerships

- United Way's Income Council
 - Volunteers expertise, opinions, and suggestions
 - One member owns a marketing company
 - Worked with CRMText to build an easy and customized system to deliver information via text
- Earned Well Initiative
- Marketing intern for this year

Outcomes

- Texts are most common early in tax season
- Texting helped VITA reach a new audience

Successes	Challenges
<ul style="list-style-type: none">• Expanded outreach through new effort• Reached new potential VITA clients• Cost efficient	<ul style="list-style-type: none">• Client had to text us first which required them to take the initial step• Lower uptake of the strategy

Goals for the Future

- Be Proactive
 - Reach out to past EITC recipients regarding the dangers of taking advance “tax loans”
 - Remind all past VITA clients of opening day
 - Promote tax time saving
 - Expand outgoing texts to all initiative participants
 - Provide info outside of tax season

Why It's Worth the Effort

- Very minimal staff time
- Proactive approach to client recruitment
- Easy way for clients to access information
- Appeals to millennials

Contact Info

Sue Matkin

817-258-8083

sue.matkin@unitedwaytarrant.org

Questions?



Recap: Opportunities for Texting in Tax Credit Outreach Efforts

- Mobilize volunteers
- Share campaign updates
- Deliver information



Thank You for Joining!

Stay Connected

- Website: www.eitcoutreach.org
- Blog: www.eitcoutreach.org/blog
- Facebook: www.facebook.com/getitbackcampaign
- Tax Credit Outreach News: <http://eepurl.com/bo6ra5>
- Email: eitcoutreach@cbpp.org

