



## Texting & Tax Credit Outreach Reference Guide

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

- **Presenters' Contact Information**

- Anamaria Ceballos, Program Coordinator - VITA and Small Business Services  
Hispanic Unity of Florida  
Hollywood, Florida  
[aceballos@hispanicunity.org](mailto:aceballos@hispanicunity.org)  
(954) 342-0428
- Christine Hazuka, Outreach Coordinator  
Prepare + Prosper  
St. Paul, Minnesota  
[christine@prepareandprosper.org](mailto:christine@prepareandprosper.org)  
(651) 262-2151
- Sue Matkin, Vice President, Community Development-Income  
United Way of Tarrant County  
Fort Worth, Texas  
[Sue.Matkin@unitedwaytarrant.org](mailto:Sue.Matkin@unitedwaytarrant.org)  
(817) 258-8083
- The Center on Budget and Policy Priorities' Get It Back Campaign  
[www.eitcoutreach.org](http://www.eitcoutreach.org)  
[eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org)  
(202) 408-1080

- **Why Texting and Outreach?**

- Most Americans use a cell phone.
  - According to the [Pew Research Center](#), as of 2014, nearly two-thirds of U.S. adults own a smartphone, and 90 percent of all American adults own a cell phone.
  - 84 percent of American adults earning less than \$30,000, own a cell phone.
  - American adults send or receive more than 40 texts per day on average.
- Benefits of Texting and Outreach
  - Instant
    - People can receive information and updates in a timely manner.
  - Doesn't require an internet connection
    - Basic phones without data plans can receive text messages, so individuals who cannot afford a Wi-Fi connection or those in rural areas are not missed.

- Easy to retrieve
  - Text messages can quickly be referred to since people already check their phones regularly.
- Short and informal
  - Texts are easy for clients or volunteers to digest. This is especially important when you consider the increasingly busy schedules of Americans.

- **Communicating with Volunteers**

Hispanic Unity of Florida (HUF) tax sites serve almost 6,000 clients each year, bringing more than \$6 million to South Florida in tax refunds. HUF uses texting to communicate with its over 100 tax volunteers.

- Why Texting?
  - Originally used phone calls and email to communicate with volunteers.
    - Phone calls got immediate attention but took too long.
    - Emails were less effort but could not get an immediate response.
  - Texting is simple and immediate.
    - Useful for last minute announcements, like schedule changes.
    - Accessible for anyone with a cell phone.
- Using Remind
  - Chose this app because it is popular with teachers and instructors.
  - Tax instructors create groups with unique codes for each class group.
  - Volunteers can access messages on computers as well as cell phones.
  - Correspondence is private: instructors' and students' numbers are not shown in communication.
- Challenges and Successes
  - Successes
    - Of 206 volunteers who were invited, 45% signed up
    - High response rate when asking for last minute volunteers (60% of volunteers responded to a text vs. 10% when using email)
  - Challenges
    - Not all volunteers responded to the email invitation, and it was not possible to text them without permission. Next year, HUF will ask volunteers to sign up using a code.

- **Reaching Current Clients**

Prepare + Prosper (P+P) runs and promotes programs and policies that foster financial health and wealth in Minnesota. P+P uses texting to support other communication methods and to maintain a year-round connection with clients.

- Why Texting?
  - Wanted to diversify outreach tactics and strategies and use texting to support other communication methods like email.
  - Studies show that people need to hear a message 7 times before they take action. Texting is a way to cross promote these messages.
  - Financial wellness doesn't end when the tax season does. Texting is a way to stay on clients' radar and maintain relevance throughout the year.

- Using [Trumpia](#)
  - Clients join texting list at the tax clinic through a financial manager.
  - Can get updates based on what they want to learn about.
- Content of Texts
  - Recruitment for programs and events
  - Tax tips and deadlines
  - Savings nudges
  - Community events, when applicable
  - Texts are shorter versions (teasers) of email communication and often include a link to a website with more information
- Challenges and Successes
  - Challenges
    - Length (123 characters)
    - Not everyone has a smartphone, and many texts include links.
    - Texts are tied to urgency, so if it's not immediately actionable, it's often forgotten.
    - Trouble tracking metrics because can't tell if texts have been opened.
    - Some websites are not mobile friendly.
  - Successes
    - Way to communicate with clients beyond tax time.
    - Increases retention rate and show rate at events (with reminder).
    - Quick way to get a sample survey of subgroup.
    - Relevant! Almost everyone has a cell phone and uses texting.

## ● Reaching Potential VITA Clients

[United Way of Tarrant County](#) (UWTC) has an *Earn Well Initiative* that provides free tax prep services, skills-based job training, financial coaching, and adult education to its clients. UWTC was looking for creative new ways to reach potential VITA clients and turned to texting.

- Why Texting?
  - Very minimal staff effort and time.
  - Proactive approach to client recruitment.
  - Easy way for clients to access information.
  - Appeals to millennials.
- Using [CRM Text](#)
  - Tax site uses “coupons” that advertise free tax services as a \$300 value.
    - The bottom of the coupon says “Text your zip code to 444999.”
  - Once users text their zip code to the number, they receive a link to the map of all 14 tax sites across Tarrant County.
  - Users can also access a website to learn more.
- Challenges and Successes
  - Successes
    - Expanded outreach and engaged new potential clients
    - Cost efficient
  - Challenges
    - Client had to send a text first, which required them to take the initial step. This led to lower uptake of texting than expected.

- **Recommendations**

- **Evaluate different applications:** Look at ease of use, cost, and simplicity.
- **Text year-round:** Texting is a great way to stay on the radar of both clients and volunteers. Use texting beyond the tax season to follow-up and engage people, update them on changes, and say thank-you.
- **Schedule messages:** Send about 1 text a month to clients, and up to 3-4 a month to volunteers.
- **Manage texts:** Have one staff member oversee texting so there are no repeats.
- **Be proactive:** Don't wait for clients to contact you first because uptake will be slow. Instead, be proactive and get permission to add them to your texting list.