Stimulus Payments Outreach
Training Reference Guide

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Presenter’s Contact Information

• Bryndan Stueve, Manager of Community Impact and Economic Mobility
  United Way Worldwide
  Washington, DC
  bryndan.stueve@uww.unitedway.org

• Annelise Grimm, Senior Program Manager
  Code for America
  Oakland, CA
  annelise@codeforamerica.org

• Mimi Turchinetz, Coalition Director
  Boston Tax Help Coalition
  Boston, MA
  Mimi.Turchinetz@boston.gov

• Penelope Protheroe, CEO
  Angel Resource Connection
  Snohomish County, WA
  penelope@angelresourceconnection.org

Importance of Economic Impact Payments (“Stimulus Checks”)

• What are Economic Impact Payments (“Stimulus Checks“)?
  o Temporary tax credit - $1,200 for adults and $500 for dependent children
  o Non-taxable money that doesn’t affect benefits eligibility
  o No minimum income needed to get the payment

• Why Economic Impact Payment Outreach is needed
  o 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)
  o 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
  - 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
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, 7,000+ 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
  o Used a program called grasshopper to route calls
  o Been slammed with service, largely questions about when payment will come
  o 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
  o Spanish and Portuguese volunteers
• Committed to banking people
  o 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
  o Walk callers through the process or fill out the form on their behalf if requested
  o Helpful for people without a computer or internet access
• Takeaway – huge need for more information
  o Callers from all over the state
  o The only helpline for the state
  o Will be doing this into the fall

Angel Resource Connection

• Nonprofit serving food, clothing, and housing to unsheltered in Seattle area
• How it started
  o Asked people serving if they had signed up for their stimulus check, many didn’t know what it was
  o Other local agencies didn’t jump in to help, so they did
• Have signed up hundreds of homeless people for the EIP
  o Media caught attention to work and gave coverage
  o Started getting calls from across the country with people wanting to learn how to help homeless with stimulus payments
  o Initially, public defenders volunteered to sign up
  o You don’t need to convince anyone – you need to have enough people there to sign people up for the payments
• Challenges
  o 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
  o Most don’t have an email address
  o Most don’t have a mailing address
  o Libraries closed – no internet access
  o Keeping safe in the face of COVID-19
• A lot of people experiencing homelessness stay in hotels and other areas
  o People are grouped together and hoping for services to come to them since most doors are closed
  o If you set up a table and chairs, they’ll line up
  o Find out where they are in motels—contact Salvation Army
  o They’re happy to see this service and they want the opportunity to get this money
• Solution
  o 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
  o You can file 2020 taxes and receive the EIP at a later date
  o 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:
  o Income under $75000 for the full amount
  o SSN
  o 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.