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The 2021 Advance Child Tax Credit is the biggest child anti-poverty effort in United States history, bringing over 100 billion federal dollars to around 67 million children in the US. As of November 15, 2021, $76.7 billion has been disbursed to 61 million children (90% of all children in the US). In Massachusetts alone, over 1.1 million children under 18 were expected to benefit from the expansion, with 55,000 children lifted above the poverty line.

The U.S Census Bureau found that right after the first payments went out in July, almost half (47%) of low-income families reportedly spent their money on food, significantly decreasing national food insecurity. 1 in 4 families with young children used the funds to cover child care costs, and 2 in 5 on rent, mortgage, and utilities. Nearly a third of parents spent the Advanced Child Tax Credit money on school expenses, especially during the beginning of this year’s school season.

However, over 4 million children were expected to miss out on this money if their parent(s) or guardian(s) did not file taxes, or used one of the simplified sign up tools. IRS data estimates that at least 58,000 children would miss out in Massachusetts alone - in addition to an estimated 220,000 individuals who missed out on stimulus payments and an average of 20% of eligible individuals that miss out on the Earned Income Tax Credit each year.

In April 2021, the Shah Family Foundation convened a group of organizations with the goal of ensuring that all eligible households in Massachusetts file taxes to get the funds that are available to them. The coalition includes Massachusetts Law Reform Institute, Greater Boston Legal Services, Children’s HealthWatch, Massachusetts Association for Community Action and Boston Tax Help Coalition.

Given that only five Volunteer Income Tax Assistance (VITA) sites and one Low Income Taxpayer Clinic (LITC) in Massachusetts remained open from May through November to serve this population, we recognized that in-person support would be a challenge and tried to leverage simple digital tools to increase awareness - while connecting people to available help based on what is right for them.

Together we created one centralized website, FindYourFunds.org, to help households with no income or low income who traditionally do not file taxes (“non-filers”) understand what is available to them and where/how they can get help. We intentionally focused on ALL tax credits and payments available, not just the Advance Child Tax Credit, although this changed during the late Fall when filing options became limited to GetCTC.org. Our key message was “Get more money with federal payments” - leaning into the idea that aligning not with the individual credits or tax terms, but with “money” more broadly, was a message that would resonate most. From this, we developed and shared multilingual outreach materials for partners to spread the word to their communities and executed an outreach plan that leveraged trusted partners and multilingual media to drive traffic to the website.
Through this process, we have had the opportunity to test a variety of outreach strategies and models. This document outlines key lessons learned and recommendations based on outreach to over 500,000 individuals, including a detailed Appendix and resources for others to use and adapt as needed. We hope that this report can help others in their outreach efforts in the future - and demonstrate that there is a real and continued need for relevant, accessible tools and resources to support non-filers.

About Us

The Shah Family Foundation believes everyone should be empowered to access the fundamentals of well-being and reach their full potential. Working with government and nonprofit partners, we build innovative, sustainable models that present new solutions to old problems. Learn more at ShahFoundation.org.

Contact Us

Email Sarah McKitterick, Project Manager at Shah Family Foundation, at sarah@shahfoundation.org.
Acknowledgements

Special thanks to our FindYourFunds partners for their continued support, invaluable insight and partnership in this project:

**Massachusetts Law Reform Institute:** MLRI is a statewide poverty law and policy support center in Massachusetts. MLRI focuses on an array of strategies and tactics that include test case and class action litigation, legislative advocacy, community lawyering, and educating the public and policymakers on issues that affect low income people.

**Greater Boston Legal Services:** GBLS attorneys and paralegals provide critical legal advice and representation to low-income individuals. GBLS carries out systemic advocacy on behalf of its clients through which thousands of families and individuals benefit everyday.

**Children’s HealthWatch:** Children’s HealthWatch performs cutting edge research on the impact of public policy on the health, nutrition, and development of children. Their network of pediatricians and public health professionals continuously monitors the influence of public policy changes on the health and well-being of low-income babies in the United States.

**Massachusetts Association for Community Action:** MASSCAP is a statewide association of 23 community organizations working in tandem with the Massachusetts Department of Housing and Community Development. They work to better serve their clients, who mostly come from low-income families, helping them escape poverty and achieve economic security.

**Boston Tax Help Coalition:** BTHC is a partnership of nonprofits, businesses, and community organizations that has been promoting the economic independence of working individuals and families since 2001. The BTHC is the largest program of the Mayor’s Office of Financial Empowerment.

We would also like to acknowledge the hundreds of partners across the State of Massachusetts, including the Commonwealth of Massachusetts, for their continued efforts to ensure that everyone who is eligible can receive their tax benefits. Thank you to our national partners, including Code For America, for your continued partnership.
Key Lessons Learned and Recommendations

Outreach Model

- People respond better when given choice on how to apply or get help - online, by phone or in-person - giving them various options based on their situation and needs.

- Having a single, centralized and trusted source of information that is simple but still has detailed information if needed is better than providing multiple links and/or information that is broken up by individual tax credits.

- Partners, particularly government agencies, are more likely to disseminate information if (1) there is a single, reliable website in multiple languages and (2) there are outreach materials available in multiple languages that can be utilized and/or adapted quickly.

Messaging

- Avoid tax jargon or anything that sounds like a scam.

- Align messaging with “federal money”.

- Use plain language.

- Be clear in communicating that you can have no income or low income to apply, immigrant eligibility, and that the money does not count toward most other benefits programs.
Outreach Strategies

✅ Given that this population is currently largely unknown and difficult to find, use a combination of broad outreach (i.e. statewide texting) and targeted outreach (i.e. partnering with trusted sources in key areas)

✅ School districts, as one of the most trusted sources of information, should be provided with resources to share with their students and families and encouraged to text where possible. Messaging is especially effective when it can include the phone number of a local VITA site or LITC that they can call for help and/or to get ITINs - plus a website with clear information

✅ Partner with State agencies to mass text their clients, including SNAP, EAEDC, TANF, WIC and housing assistance recipients. We saw significant increases in web traffic to available online sign-up tools and in phone calls to VITA sites with each text message, indicating that providing multiple ways to get help is essential

✅ Other efforts to consider include:
  ▪ Host Facebook Lives with key partners in multiple languages
  ▪ Partner with Mayor’s Offices to spread the word, particularly via local press or Facebook Lives - and directly connect individuals with local tax experts where possible (and in multiple languages)
  ▪ Utilize video via YouTube
  ▪ Mailers, while more costly, could be effective if paired with State notices (ex - flyer in Summer Pandemic EBT notice to all P-EBT households)
Recommendations for Future

✅ Regular Access to Data
We believe that regular access to data from the IRS is crucial to understanding the true impact of outreach efforts on returns filed - and the number of individuals who have not yet been reached:
  ◦ The IRS should provide monthly data by zip code on the number of returns processed outside of tax season (May-December 2021) and throughout 2022
  ◦ The IRS should provide regularly updated data on the identified “gaps.” We support Code For America’s identified strategy for this [here](#).

✅ Simplified Filing Tool & Support
We support a simplified tool for next year’s tax season for ALL tax credits - the Child Tax Credit, Earned Income Tax Credit and Stimulus Payments - which is based on this year’s success by Code For America and is crucial to reach non-filers. It should be provided in languages other than English and Spanish, and offer phone and chat support.

✅ Increased Navigator/ VITA Support
Broad outreach is only successful when it results in people getting timely help: increased support of programs that provide individualized, free tax support (Navigators, LITC, VITA, hotline help etc) is needed to continue to serve individuals in the new tax season.

✅ Centralized Website
Finally, based on our key learnings, we recommend that a single, simplified national website is created to inform non filers of tax benefits and directs individuals to help based on their needs. This should be coupled with clear outreach materials in multiple languages for partners to use. We are happy to assist with this effort.

[findyourfunds.org](#)
Project Overview

About FindYourFunds.org

- Available in 6 languages (the 6 most frequent languages spoken by SNAP clients in Massachusetts)
- Mobile friendly (95% of users used mobile to access our website)
- Website structure:
  - Provides the user with information in 3 clicks or less:
    - Am I eligible? What could I get? How do I get it?
  - More detailed information provided in an up-to-date FAQ section
  - “Apply Page” features a range of options to apply based on (1) whether the user needed to file a full tax return or not, AND (2) by whether the user preferred to apply online, with phone help or with in-person assistance
- We committed to regularly updating the website

Our messaging strategy:

We included messaging about ALL the payments people could get, including stimulus and the Earned Income Tax Credit, not just the Child Tax Credit. We did this because:

- We believed people who do not file taxes would not know about the individual credits and/or think that it would not apply to them;
- The Advance Child Tax Credit was new and perhaps less recognizable; and
- We wanted our website and our messaging to remain relevant for the following tax season - hoping that people will revisit in the future.

We also...

- Used plain language
- Avoided “tax” terms and references to “credits” or “filing” unless clearly explained
- Used words like “apply” and “sign up” (based on the University of Michigan’s report)
- Aligned our messaging with COVID money or federal payments that people have already received (including “federal money,” “COVID money,” and “federal payments”)
- Clearly addressed key issues like immigrant eligibility and that the payments do NOT count toward most other benefits programs

Target Audiences

01. Individuals with no income or low income who traditionally do not file taxes or have not filed in the last few years (“non-filers”)

02. ITIN Holders with citizen children
Primary Messages:

- You could get thousands of dollars in federal money with tax payments
- Sign up for this money by completing a 2020 "tax return"
- You do not need an income to get these payments

Secondary Messages:

- If you are low/no income, you can apply at any time
- If you make $57,000 or less, you can get help for FREE
- Getting these payments does not impact your status or the status of the people you live with
- This money does not count toward benefits programs, like SNAP or MassHealth

Outreach Toolkit

We created a comprehensive outreach toolkit in 11 languages (English, Spanish, Portuguese, Haitian Creole, Cape Verdean, Russian, Vietnamese, Arabic, Khmer, Simplified Chinese and Traditional Chinese), which was distributed to partners and was available for download on our website.

The toolkit included:

- Email templates
- Text message template
- Robo call script
- Flyers
- Multiple social media posts (Facebook, Instagram, Twitter), including graphics and copy
## Results in Massachusetts

NOTE: The data listed below is what is publicly available to us. Right now, we only concretely know the number of individuals who signed up on GetCTC.org and GetYourRefund.org; other conclusions we can only hypothesize based on our available web data and partner feedback.

Given the other options that individuals could have used to apply, including using paid preparers or other tools, we hope that data will be made available on the number of new tax filers after May 2021, including the number of individuals that used the IRS Non-Filer Sign Up Tool.

### FindYourFunds.org Web Data (June 1 – December 1)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Visits</strong></td>
<td>376,000</td>
</tr>
<tr>
<td><strong>Unique Visitors</strong></td>
<td>272,000</td>
</tr>
<tr>
<td><strong>Page Views</strong></td>
<td>702,000</td>
</tr>
<tr>
<td><strong>Average time spent on site</strong></td>
<td>1 minute 47 seconds</td>
</tr>
<tr>
<td><strong>Average visits per day</strong></td>
<td>2083</td>
</tr>
<tr>
<td><strong>Click Throughs to “Apply” options (rounded up)</strong></td>
<td></td>
</tr>
<tr>
<td>GetCTC.org</td>
<td>40,000</td>
</tr>
<tr>
<td>IRS Non Filer Sign Up Portal</td>
<td>25,000</td>
</tr>
<tr>
<td>GetYourRefund</td>
<td>4,600</td>
</tr>
<tr>
<td>Get Phone Help (Code For America hotline)</td>
<td>1,723</td>
</tr>
<tr>
<td>Calls to Local VITA site</td>
<td>920* clicks not captured from Text 1</td>
</tr>
<tr>
<td>TaxSlayer</td>
<td>8,500</td>
</tr>
<tr>
<td><strong>Peak website visits</strong></td>
<td></td>
</tr>
<tr>
<td>DTA Text 1: 06/10 - 84,700</td>
<td></td>
</tr>
<tr>
<td>DTA Text 2: 09/28 - 51,600</td>
<td></td>
</tr>
<tr>
<td>WIC Text: 11/03 - 34,000</td>
<td></td>
</tr>
<tr>
<td><strong>Top geographical areas in Mass.</strong></td>
<td>Boston, Attleboro, Springfield, Dorchester, Worcester</td>
</tr>
</tbody>
</table>
Overall number of children getting the Advance Child Tax Credit: July - November 2021

- As of November 15, $1.28 billion has been distributed to Massachusetts residents since July. A monthly analysis shows that there has been a gradual 4.35% increase in the total payment amount from July to November.

- On an average, each child in Massachusetts has received $242 each month during this period.

Around 1,075,000 children received the Child Tax Credit payment in Massachusetts in November.

From July 15 through November 15, the number of children receiving payments increased by 15,000.

GetCTC.org sign-ups

When GetCTC.org was launched as a simplified tool for non-filers in September, we were able to track real-time data on the number of simplified returns filed in our State using the unique URLs provided by Code For America.

Accepted returns in Massachusetts using GetCTC.org:

![Accepted CTC Returns, by Day Started](image)
A total of 2,605 returns were filed in the state of Massachusetts through getCTC.org, with each household receiving an average of $4,200 ($10.9M total into the economy)

Massachusetts was the 12th highest state for accepted returns on GetCTC.org

47% of the 5,540 submitted returns were accepted, higher than the national average of 42%

Returns that were not accepted:

Top reasons that returns were rejected included:

- Child was claimed on a tax return previously
- ID verification issues, including: the filer not knowing their IRS Identity Protection (IP) pin, entering incorrect annual income or name not matching their Social Security number in the IRS database
- Technical errors, including: duplicate dependents submitted, IRS submission issues, or other
GetCTC.org/FYF Unique URL

We used a unique URL to track the number of returns processed through GetCTC.org from FindYourFunds.org. Out of the total returns, approximately 1150 returns were filed via our unique URL.*

Approximately 44% of the families that signed up on getCTC.org used the FindYourFunds website to do so.

As a result of our outreach, FindYourFunds.org resulted in almost 40,000 pageviews to GetCTC.org from late September - November 15.

Given that no other major outreach efforts were underway during this time, we believe that individuals could have come back to GetCTC.org at a later date, or called to get help and applied later. If we consider the pageviews to be unique, potentially, up to 14% of visitors from FindYourFunds ended up applying.

Note: An additional 10 returns were processed using this link but were from outside of Massachusetts
GetYourRefund Usage

FindYourFunds.org linked to GetYourRefund as an option to apply from June-October. It was recommended for those who wanted in-person help. However, given that GetYourRefund had limited availability, it was not promoted consistently as an option.

Only 51 individuals used GetYourRefund in Massachusetts from May - October 2021, despite more than 300 attempts and 4,600 clicks to GetYourRefund from FindYourFunds.org. Over 50% of these accepted returns occurred the week of September 26th, when the text to SNAP clients was sent.

Number of filing attempts using GetYourRefund in Massachusetts (May-September 2021)

![Graph showing number of filing attempts](image)

Number of successful filers using GetYourRefund in Massachusetts (May-September 2021)

![Graph showing number of successful filers](image)
Summary of Outreach

Commonwealth of Massachusetts Outreach

The Commonwealth of Massachusetts was strong in its support of outreach related to FindYourFunds.org. In particular, the Department of Transitional Assistance (DTA), who administers benefits through SNAP and cash assistance, supported large scale efforts to reach their clients. Given that three quarters of the 12 million people that missed Stimulus Payments were estimated to get SNAP or Medicaid benefits, this population is a key target audience.

Seven departments helped to spread the word, including the following:

- Department of Transitional Assistance (texting to clients, flyers with notices to clients, outreach to the SNAP coalition)
- Department of Public Health (texting to WIC clients)
- Office of Immigrants & Refugees (distributed throughout programs and sent to managers of the Refugee Employment Service Providers)
- Department of Elementary and Secondary Education (sent information twice on FindYourFunds to all districts as part of the Superintendent’s Bulletin)
• Department of Housing & Community Development (included in digital toolkit as part of Emergency Rental Assistance Program outreach program to 22 targeted municipalities)
• MassHealth (included on website and in 3 e-blasts to different stakeholders)
• Department of Elder Affairs (distributed through network)
• Department of Revenue (distributed through network and posted on social media)

Flyers to SNAP and P-EBT households

FindYourFunds.org flyers were included in a mailer to over 560,000 households that received Summer Pandemic EBT (P-EBT) in Massachusetts. These were distributed throughout July 2021. The flyers were provided in English and Spanish and funded by Shah Family Foundation and mailed by the Department of Transitional Assistance as part of a letter that families received about Summer P-EBT.

• Over 190,000 households on SNAP whose children received P-EBT got a buck slip entitled “You could get thousands of dollars in federal COVID money!” (See Appendix).
• An additional 365,000 children who got P-EBT and are not on SNAP received a flyer about SNAP which included a blurb promoting the Child Tax Credit (See Appendix).

While difficult to discern the efficacy of the flyers distributed, there were 17,000 unique visitors to the website during the 5 week period that the mailer was distributed, and 10,000 views of the homepage, indicating that direct mail could be another strong touchpoint to reach the target audience.

Statewide Text Messaging

In total, the Commonwealth of Massachusetts sent 3 text messages from June - November 2021. Each text message had its own unique URL.

Summary of Messages Sent

All texts resulted in high click through rates: 24% DTA Text 1, 23% DTA Text 2 and 52% WIC text

The WIC text, while significantly higher click through rate, resulted in slightly less sign ups on GetCTC.org (.85% for DTA Text 2 vs .7% for WIC). Given that individuals could have applied via other methods, we do not know the true number of applicants

All VITA sites listed on the website experienced an increase in calls with each text message
<table>
<thead>
<tr>
<th>Text</th>
<th>Audience Size*</th>
<th>Website Visits (1 week period)**</th>
<th>Available Results</th>
<th>Messaging</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DTA Text #1 (6/10/21)</strong></td>
<td>433,714</td>
<td>24% click through rate</td>
<td>Without IRS data, an estimate of tax returns completed as a result of this outreach is unknown; however, anecdotaly we have heard of individuals seeking tax help as a result.</td>
<td>If you have a child you could get up to $300 a month per child with Federal Child Tax Credits starting in July. You can apply today, even if you didn’t file taxes this year. This money does not count for DTA benefits. Learn more: findyourfunds.org/funds1</td>
</tr>
<tr>
<td>SNAP, EAEDC and TANF clients</td>
<td></td>
<td>104,000 unique visitors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Languages: Chinese, English, Haitian Creole, Portuguese, Spanish, Vietnamese</td>
<td></td>
<td>128,000 pageviews of the unique URL</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>82,000 views of the “Apply” page</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DTA Text #2 (9/28/21)</strong></td>
<td>439,384</td>
<td>23% click through rate</td>
<td>865 accepted returns over 1 week period in MA on GetCTC.org; estimated 92% used unique URL to apply.</td>
<td>You might be eligible for more federal dollars, like missed stimulus payments or a Child Tax Credit up to $300/month per child. You can apply today, even if you haven’t filed taxes before. File taxes or apply before October 15. This money does not count for DTA benefits. Learn more: findyourfunds.org/funds2</td>
</tr>
<tr>
<td>SNAP, EAEDC and TANF clients</td>
<td></td>
<td>100,000 unique visitors</td>
<td>300-400 calls to Boston Tax Help Coalition (up from 20-30 per week), including a spike in calls on or before the October 15 deadline; other VITA sites reported an increase in call volume.</td>
<td></td>
</tr>
<tr>
<td>6 Languages: Chinese, English, Haitian Creole, Portuguese, Spanish, Vietnamese</td>
<td></td>
<td>120,000 pageviews of the unique URL</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>63,000 views of the “Apply” page</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>23% click through rate</td>
<td>23% click through rate</td>
<td></td>
</tr>
<tr>
<td><strong>WIC Text (11/3/21)</strong></td>
<td>78,444</td>
<td>52% click through rate</td>
<td>307 accepted returns over 1 week period in MA on GetCTC.org; 38% used unique URL to apply.</td>
<td>Reminder to WIC families: Apply for Child Tax Credit (up to $1800/child in 2021) by Nov 15! Go to findyourfunds.org/funds3</td>
</tr>
<tr>
<td>WIC clients</td>
<td></td>
<td>40,800 unique visitors***</td>
<td>48,000 pageviews of the unique URL</td>
<td></td>
</tr>
<tr>
<td>5 languages: English, Portuguese, Somali, Spanish, Vietnamese</td>
<td></td>
<td>29,000 views of the “Apply” page</td>
<td>17,000 clicks to GetCTC.org/fyf; 1360 clicks to GetCTC Hotline.</td>
<td></td>
</tr>
</tbody>
</table>

*Number of households that were successfully reached
**Site visits measured for a period of 1 week after each text message was sent. Each unique URL led to a duplicate of the homepage. If not specified, the numbers are not unique but we assumed that the majority of web page views and traffic came from these text messages.
***Note: other communications by school districts were sent out during this time, assumed that 15% of traffic was from another source and adjusted click through rate accordingly
Our high click through rates (23-52%) indicated that:

- Text messages from the State are an incredibly powerful tool to reach a large number of individuals in our target audience quickly.
- Trusted sources like the State, whom individuals are already receiving messages from, are more likely to be successful.
- Clear messaging on the amount that you could get, the deadline and highlighting that benefit amounts do not count (like SNAP) works.

Texts were referred back to frequently as a resource: after the first text in June, there were 6,000 page views of the unique URL from July 15-August 15, indicating that people may have heard of the Child Tax Credit after it came out and went back to their text message from the month prior.

Conclusions - Partnering with State Departments:

*This URL was also used in a text to 1800 Chelsea residents*
• While click through rates were very high, sign ups on GetCTC.org were less than 1% of the total individuals who clicked on the website. Given that we do not have IRS data and therefore do not know the number of returns filed by other means, it is hard to determine the actual conversion rate. However, we can assume by the increased number of phone calls with the second text message that individuals did get help in person, by phone or potentially by a paid preparer.

• Even if people did not sign up, texts are a powerful tool to increase awareness, connect individuals with phone help and get their questions answered. We hope that people will revisit FindYourFunds.org in the next season as a source of information and support.

“One thing of note that the Navigators mentioned was that callers were not aware that other resources were out there. While the majority of the calls we got from these texts were people asking about tax credits, they were often very excited to hear from the Navigators about what other resources were available. Some callers said they felt hopeful for the first time in a long time.” - Boston Tax Help Coalition

Tips for engaging with your relevant state department:

✔️ Use available data to show the need in your State and the gaps in access
   Highlight the amount of money that their constituents could benefit from - and the amount that will go into the local economy

✔️ Share examples of what other departments are doing (national or within your state) and the results

✔️ Figure out what communications tools already exist that might be leveraged - mass texting, emails, newsletters, coalitions, social media, etc - and provide relevant materials in multiple languages for them to use. These may be edited according to the State’s communication preferences, but we found providing a template and clear ask upfront was both useful and appreciated.

See our Appendix for a template email that was sent to key department officials.

“One thing of note that the Navigators mentioned was that callers were not aware that other resources were out there. While the majority of the calls we got from these texts were people asking about tax credits, they were often very excited to hear from the Navigators about what other resources were available. Some callers said they felt hopeful for the first time in a long time.” - Boston Tax Help Coalition

“Most people were calling about: 1) They heard there was money available for them and wanted to know what it was/how to get it, 2) They knew or had read about the CTC and weren’t receiving it and wanted to know what to do, 3) They knew what to do and had filed taxes but weren’t getting the CTC and wanted to know if we could figure out why.” - Greater Boston Legal Services
Targeted Cities Initiative

Using the data from the Department of Treasury of the number of children under age 18 who are not found on a Tax Year 2019 or 2020 Tax Return but appear on health insurance forms, we directly targeted 18 municipalities with high numbers of children who are potentially unclaimed.

Within each of the 18 targeted municipalities, we directly asked the City and/or District to spread the word using our toolkit materials directed to FindYourFunds.org.

During Phase II we introduced a new tactic - in 10 cities where there was a VITA/ LITC site available or within their service area, we provided toolkits with the contact information of the available VITA site.

Targeted Cities

We directly reached out to cities to ask them to spread the word in their communities. Typically we emailed and called a communications or partnerships lead in the Mayor’s Office and provided them with our outreach toolkit to use.

Example: City of Chelsea
- The City of Chelsea sent out a text message to 1800 individuals that were part of a guaranteed income program on 11/04, resulting in 500 visits on FindYourFunds.org and increased calls to Greater Boston Legal Services for help, including ITINs
- Facebook Live: The City Of Chelsea hosted a Facebook Live in English and Spanish with Greater Boston Legal Services that garnered over 1200 views - with a specific focus on immigrant eligibility

Example: City of Revere
- Mayor Brian Arrigo hosted a Facebook Live with a local tax expert to provide clear information about the funds. Informational videos were also posted in multiple languages on RevereTV
- Posted notices on their website, on social media and in the city newsletter
- Encouraged partner networks to spread the word to their clients
School Districts

In addition to FindYourFunds.org being sent to all districts statewide in the Commissioner’s Bulletin, we directly reached out to school districts in targeted areas and asked them to promote our resources in whatever ways they best communicate to families - including text, email, robo call, flyers and social media.

School District Test - Direct to GetCTC.org

We tested whether families in targeted districts were more or less likely to get help via an online tool or a direct phone number to a VITA site. To do this, we partnered with seven districts to send out targeted communications.

In 2 districts, materials directed individuals to GetCTC.org. Unique URLs were provided to each district to track each outreach effort by type of communication - flyer, email, text or social media. District 1 has 6,100 students and District 2 has approximately 8,800 students. Outreach was conducted in early November - roughly two weeks prior to the November 15 deadline.

Results:

<table>
<thead>
<tr>
<th>District</th>
<th>Communications</th>
<th>Traffic to getCTC.org</th>
<th>Results/Conversion Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>District 1</td>
<td>Flyer (put in backpacks of 6,100 students)</td>
<td>17 Visits</td>
<td>0 returns / 0 %</td>
</tr>
<tr>
<td>District 1</td>
<td>Text message (5,500)</td>
<td>0 Visits</td>
<td>0 returns / 0 %</td>
</tr>
<tr>
<td>District 2</td>
<td>Flyer* (5,280)</td>
<td>29 Visits</td>
<td>0 returns / 0 %</td>
</tr>
<tr>
<td>District 2</td>
<td>Email (7,000)</td>
<td>936 Visits</td>
<td>6 returns; $5250 average refund - $31,500 delivered total; 9 not accepted / .09%</td>
</tr>
<tr>
<td>District 2</td>
<td>Text Message (5,808)</td>
<td>2,013 Visits</td>
<td>6 returns; $9900 average refund - $59,400 total delivered; 2 not accepted / .1%</td>
</tr>
<tr>
<td>District 2</td>
<td>Social Media (1,200 followers)</td>
<td>20 Visits</td>
<td>0 returns / 0 %</td>
</tr>
</tbody>
</table>

*Note: Not all schools sent these communications out. Estimated that 60% of students received.
School District Test - Direct to local VITA or LITC site

In five other districts, we provided toolkits that had the direct phone number of a nearby VITA site and the link to FindYourFunds.org. Outreach was conducted in early November - roughly two weeks prior to the November 15 deadline.

<table>
<thead>
<tr>
<th>VITA/LITC Partner</th>
<th>Districts</th>
<th>Communications</th>
<th>Results/Engagement Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Lawrence Community Action Council (VITA)</td>
<td>Lowell Public Schools</td>
<td>Email (18k)</td>
<td>50+ phone calls / .3%</td>
</tr>
<tr>
<td>Greater Boston Legal Services (LITC)</td>
<td>Everett Public Schools</td>
<td>Text Message (3k)</td>
<td>40+ phone calls / 1%</td>
</tr>
<tr>
<td>Greater Boston Legal Services (LITC)</td>
<td>Chelsea Public Schools</td>
<td>Text Message (6k)</td>
<td>100+ phone calls / Traffic spike on FindYourFunds (1100 visitors) / 1.7%</td>
</tr>
<tr>
<td>Greater Boston Legal Services (LITC)</td>
<td>Revere Public Schools</td>
<td>Email (approx 7100/4000 opened)</td>
<td>30+ phone calls / .8%</td>
</tr>
<tr>
<td>Community Economic Development Center of New Bedford</td>
<td>New Bedford Public Schools</td>
<td>Text Message (Number unknown)</td>
<td>Increased phone calls for support; exact number unknown</td>
</tr>
</tbody>
</table>

*Tax return data not yet available from partner sites so cannot determine conversion rate; the majority of sites reported that the individuals that called were unlikely to use GetCTC.org and instead needed to file full tax returns and were either assisted in this process or encouraged to file next year. A subgroup of these needed ITINs before filing next year.

Conclusions - Targeted Cities & Districts Initiative:

- As trusted sources, school district communication are incredibly effective at getting the word out.
- From our test, more people took action when the action was to call a local site
  - Directing parents/guardians to GetCTC.org via text and email had high web engagement - but a very low number of applications
  - Directing parents/guardians to VITA sites also had consistent engagement and increased phone calls - but very few of these individuals could use the simplified filing tool and instead had to file full tax returns
  - We believe that families prefer to talk to a trusted, local source where they can get information and check eligibility - and get help with complicated situations or getting ITINs. Even if they already got the credit or were not eligible, they were able to be directed to other resources if needed - and/or to stay in touch and be contacted to sign up again in the new tax season
- While the numbers from GetCTC.org were lower, the dollar amount that families received was incredibly high - up to $9900 on average. Timing may have played a negative factor in sign ups as well.
“By far the texts spurred the most response. There were over 170 calls; roughly 80% of these could not use GetCTC.org and needed to file a full tax return next year instead. About 30 families needed ITINs (representing about 40 kids). Many callers were worried about the “deadline.” Some were receiving the credit but were having problems with interrupted payments. Some needed more help because a noncustodial parent is getting the money. Many were confused about nonfiler eligibility, believing one needed income to report, or that it was a loan. The vast majority were Hispanic; many undocumented Brazilians...I could tell as soon as the texts went out from the schools, the calls came fast and furious.” - Greater Boston Legal Services

Tips for Engaging Cities and School Districts:

- **Identify your point of contact:**
  - For Cities: Call the Mayor’s office and ask who the most appropriate contact is; typically your point of contact will be a communications or partnerships lead.
  - For Schools: Call and email the Superintendent, family engagement liaison and/or communications lead.

- **Clearly outline the amount of money that children could get from the tax credits/ stimulus payments - and the amount that will go into the local economy:**
  - Once GetCTC.org was available, we were able to search by zip code to see the number of individuals who used it to get their refund and the amount of money they got. For example: “So far in CITY NAME, just 30 people have gotten the credit using GetCTC.org - but on average they are receiving $5,500 each.”

- **Identify the number of children that could miss out on the credit in their city**

- **Share examples from other cities/districts on what they are doing to spread the word - and results if possible.** For example: “Chelsea Public Schools recently sent out a text message to all families which resulted in 1300 visits to our website and over 100 phone calls to Greater Boston Legal Services for help. Clearly there is a need - and we’d love to make sure your families can get the money they are eligible for.”

- **Everyone is busy - make it easy for them:**
  - Provide a menu of ideas for cities/ districts to take part in (media, Facebook Lives, social media, text messaging, etc) and offer relevant materials in multiple languages for them to use and adapt.
  - In addition to our outreach toolkit, we also provided talking points and a template press release.

See the Appendix for templates that can be provided to cities and districts.
Hotline Data

Code For America Hotline

We added a hotline number to FindYourFunds that was provided by Code For America in early November. The number received over 1000 clicks. Data is forthcoming on results.

211 Partnership

Mass2-1-1 provided information via phone to clients calling their hotline from October-November 15 as part of a pilot. In total:

- 2,260 callers received basic information about the Child Tax Credit when they called the hotline
- 350 callers clicked to speak with someone directly about the Child Tax Credit (283 in English, 67 in Spanish) to get phone support and ask questions.

Note: Mass2-1-1 call takers are not Child Tax Credit Navigators or tax professionals, but the hotline was another way to get information out to our target audience (many of whom call for health, housing and child care information) and direct them to available help.
Other Outreach Efforts

Community Partner Outreach

We sent emails asking targeted community organizations to spread the word, including: Massachusetts SNAP Coalition members (1000+ members), Massachusetts Immigrant and Refugee Advocacy (MIRA) coalition organizations (100+), Head Start partner organizations (80+). We also reached out to over one hundred faith-based groups, homeless shelters, immigrant groups, youth employment centers, etc.

We found that outreach was most effective when another trusted partner (i.e. the Mayor’s Office) asked an organization to support and spread the word.

“Taxes and anything IRS-associated often gives the general public a scare; however, given the nature of the stimulus checks, a lot of people were actually engaging with us and looking to us for answers and support, which is why FindYourFunds was such a helpful tool...we often referred to the first and second stimulus checks as the ‘$1200’ and ‘$600’ checks, which helped us with outreach tremendously - by using the dollar amounts, we were able to skip past the language boundary of the check’s name and head straight to what benefits were available to our clients.”

- Nhan Truong, Community Engagement Coordinator, VietAID

Media and Social Media

Given that it is estimated that half of the population that is at the risk of not receiving the Child Tax Credit is Hispanic, and 30% of those primarily speak Spanish, we targeted media in Spanish as follows:

- El Mundo Boston:
  - Digital articles in June and October, which have a collective readership of over 650 and print articles in June and October (100,000+ readership)
  - Facebook post
  - Facebook Live events in June and November with a tax expert from Greater Boston Legal Services to clarify key information, including immigrant eligibility

- Digital Article in Telemundo Boston.
- Advertisements on La Mega radio station (estimated 100,000 daily listeners)
Other Media:

- Advertisements on WJFD radio station in Portuguese
- Two Facebook Lives by the Brazilian Women’s Group in Portuguese with an immigration attorney and local tax expert (June and October)
- Advertisement in Chinese in the Sampan newspaper (6,000 readership)

In addition, over 50 organizations posted on their social media, including the City of Boston:

Lessons Learned - Media & Social Media

- Video and articles in languages other than English should be utilized (and shared with partners to push out to their clients as well)
- Facebook had more engagement than other platforms
- Posts by schools and trusted community organizations tended to have more engagement
- Facebook Live events in languages other than English got less views on average, but resulted in more inquiry phone calls to VITA sites for help
IRS Non Filer Sign Up Tool Video

We created a YouTube video ‘How to Apply for the Child Tax Credit with the IRS Non-Filer Sign Up Tool’ to help non-filers understand and use the tool. With minimal promotion, the video received over 15,000 views, 233 likes and 54 comments, which were answered by a partner at Greater Boston Legal Services.

62% of traffic to the video came from direct search on YouTube, and the average view duration is 4:47 minutes.

Lessons Learned: As many did not watch the video in its entirety, this suggests that the IRS tool was either too complicated or individuals figured out how to use the portal on their own. However, YouTube is a primary search engine for people to find information and it’s recommended that this is leveraged as a communications tool for the future.

Webinar

A webinar was conducted on June 11, 2021, by Children’s Health Watch, Greater Boston Legal Services and the Shah Foundation to provide information about the expanded tax credits, describe how organizations can help their clients access these benefits and launch FindYourFunds.org. Introduced by Senator Ed Markey, it was attended by 120 individuals representing a variety of schools, nonprofit and service organizations. This served as a great way to provide high level information on tax benefits and how local partners can help their clients.
Paid Social Media

The paid social media ads for FindYourFunds were managed by Children’s Healthwatch and were placed on Facebook and Twitter in English and Spanish.

- Timeline: July 7, 2021-July 26, 2021
- The ads were primarily placed in Worcester County, MA, but were spread across other towns such as Springfield, Lynn, and Lowell
- The targeted demographic of the ads were parents in Massachusetts who spoke English and/or Spanish
- The first round included a video and information on the CTC which was viewed by 28,000 people on Facebook and 4,000 users on Twitter
- The second round was targeted to those who watched the video and included an image and a call to action to get help at the FindYourFunds website, resulting in 506 clicks to the website

See Appendix for full ad campaign details and analysis.
Appendix

1. General outreach toolkit
2. Partner outreach toolkit
3. Flyer in P-EBT notices to individuals receiving SNAP and P-EBT
4. Flyer in P-EBT notices to individuals receiving P-EBT
5. Email template to Cities
6. Email template to State Departments
7. Email template to school leaders
8. Facebook Live Material
9. Slides for Facebook Lives (multiple languages)
10. Article in Spanish (El Mundo article)
11. Template press release for cities
12. Paid social campaign and analysis
13. Newsletter - Department of Elementary and Secondary Education’s Commissioner’s Bulletin

*Link to the Appendix*