

# **Working Families Tax Credit Grantee Listening Sessions Report June 2023**

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## BACKGROUND

The 2021 Washington State Legislature passed ESHB 1297 which expands eligibility and funding for the Working Families Tax Credit (WFTC) program. This program is intended to support Washington's low-to-moderate income working families and individuals.

Department of Revenue has partnered with community-based and community-led organizations across the state to ensure that information about the Working Families Tax Credit reaches all Washington residents, especially those who may benefit from direct services in their local communities. The legislature made a total of \$10,000,000 available for these community outreach grants for fiscal year 2023.

In summer 2022, we partnered with Department of Commerce and began accepting applications for the Working Families Tax Credit Community Outreach Program grants. [37 organizations](#) were selected to receive funds and began their outreach efforts in October 2022. Recipients are non-profit organizations, small for-profit businesses, and organizations that serve minority groups and tribal governments located in Washington state.

In June 2023, DOR hosted two virtual listening sessions to share their experience as a grant recipient organization for the Working Families Tax Credit program. During each session, the grantees were provided the opportunity to provide feedback on the following:

- Were the goals and objectives of the grantee organizations achievable?
- What did the Department of Revenue do to enable success?
- What did you see (as a community grant recipient) as some of the challenges and shortcomings of the overall WFTC program?
- What could the Department of Revenue have done to better support you?
- What could the Department of Revenue do to encourage and reach more potential applicants?

The input received will help drive changes to the overall WFTC program and guide processes in partnering with community organizations in the future.

## **LISTENING SESSIONS APPROACH**

Grantee listening sessions were held via Zoom and included a facilitator, host, note-taker, and two Spanish interpreters. Each session covered the same questions.

Listening sessions were promoted through WFTC outreach and targeted email campaign.

During these sessions, grantees were invited to provide their feedback, both verbally and via chat. These listening sessions were not recorded. For community grantees unable to attend the listening sessions, a survey was also available that included the same questions and themes as shared in the listening sessions.

The listening sessions were held:

- Tuesday, June 6 at 1 p.m.
- Thursday, June 8 at 10 a.m.

Total attendees: 40

Total comments collected: 190

## **SURVEY RESPONSES**

We received 4 survey submissions including one response each from Bellingham, Omak, Seattle, and Kirkland.

## KEY FINDINGS

### GOALS AND OBJECTIVES

*Were the goals and objectives for you reasonable and achievable?*

#### Feedback themes

Responses in both the listening sessions and the survey strongly agree that the goals and objectives set were reasonable and achievable. There was emphasis on the appreciation of the clarity of the goals and objectives and flexibility allowed in meeting them.

Noted challenges included:

- In person outreach.
- Lack of knowledge around ITIN application assistance.
- Spending allocated funds in dedicated time frame.
- ESL (English as a second language).

#### Listening session and survey comments

- The organizations worked hard in doing outreach in various ways to meet people where they are at and providing content in various languages. 43% of eligible individuals and families already submitted an application which exceeded the 40% aspirational goal per COMMERCE's estimates based on rolling out other programs in year 1.
- I don't know if I reached everyone in our target area.
- We faced barriers for in person outreach and tax completion work.
- We far surpassed the number of Head Start family support staff participating in our financial literacy/tax credit outreach trainings.
- The goals set forth were reasonable, but we always strive to exceed goals and put in place stretch goals. The extra funding was helpful, so we were able to do much more outreach than was in our grant proposal.
- Yes, it was fairly straightforward. We offered 8 trainings and had great attendance and another cohort of parents conducted their own outreach in specific communities.
- Generally, I'd say yes.
- Goals and objectives were clearly laid out – English as secondary language challenge.
- For us they were. I am new to my position, and I have not been here the whole duration of the grant, but they seemed to be clear and I was able to work with the existing program in January.
- Generally, yes. The community org lacked knowledge when they drafted deliverables- especially around ITIN assistance that doesn't really exist, and they thought they could have had that knowledge.
- Yes, I think they were – There was flexibility on reaching goals. Organizations can shape outreach.
- Mostly. We were excited to receive more than we asked for, but as a really small organization, we had trouble making goals that would spend down the amount.

- Commerce and DOR requirements about application and responsibilities needed to match up. More clarity on relationship between Commerce and DOR.
- Yes, they were achievable and reasonable. We felt well supported and the fact that we could get content approved quickly, that helped tremendously. Also, we liked how we had flexibility to do outreach in many different ways and tweak as needed.
- The goals felt reasonable and achievable, and I think that this will only get better the following year when we will have data from this year to build on.
- Mostly. I think one of the challenges was definitely the requirement of spending all the funds before July when we wanted to build out our outreach and quite a bit will be happening after that time.
- Yes, it was understood that outreach and education--clearly articulated in grant application.

## WORKING WITH THE DEPARTMENT OF REVENUE

### *What did the Department of Revenue do right to enable success?*

#### **Feedback themes**

Responses in both the listening session and survey provided positive feedback sharing the variety of ways that grantees felt DOR enabled success.

Common responses include:

- Shared Google Drive for resources.
- Training sessions and meetings.
- Ask DOR document.
- Communication and support by Outreach team.
- Toolkit (includes multiple language materials).
- Videos in both English and Spanish.

#### **Listening session and survey comments**

- Communication was excellent by Perla. Approvals were ALWAYS provided quickly by Perla. We felt supported by Perla. The Google drive was helpful to see what other organizations were doing and to content with each other. Also, the FAQs document on Google drive was excellent. Perla came to one of our events and provided positive feedback to our team. The initial training on the application was thorough. It was really nice that we could do the WFTC online through TaxSlayer (at our VITA site). This was instrumental!
- The WFTC responded quickly and provided training sessions. They also had outreach specialist whom we could work with and created a shared drive. To be as broad as possible, to accept any form of payment. Such as self-employment, written documentation, cash receipts.
- Monthly grantee meetings with DOH and DOR that provided updates and had time for questions and discussions.
- A ton of support including regular information and zoom meetings.
- I loved the Ask DOR document! +2
- Limitation of written communications, liked reoccurring calls, may be more frequent - specifically on updates/experiences as groups doing the work.
- Hosting regular calls with grantees to provide updates.
- I can't really answer that for WestSide Baby since I have not worked with them myself.
- Enthusiasm of regional outreach representative (DOR). Appreciated their sensitivity, passion, and collaboration!
- Training Sessions
- Setting-up training videos
- On-going data updates
- Good, supportive, and responsive team at DOR who were always willing to answer questions.
- Shared Google drives +4
- DOR did a lot of advertising, which was good.
- Informative meetings, Google Drive, quick approvals on content we developed.

- DOR was great at building relationships with the grantees that allowed them to be an open lifeline as needed, providing training, info, data, support, approvals, building teamwork among grantees to synergize the efforts without 'double dipping' in the same efforts.
- The website was great.
- Great ads and the Shared Folders were helpful.
- Toolkit
- Videos in English and Spanish – Translated materials in toolkit
- Hopefully we can good more languages next year and clear communication about wait times and troubleshooting for checks to be distributed.
- The toolkit with the different languages were helpful. We leverage flyers (in multiple languages).
- Call center has been helpful too.
- The outreach calendar online was great.
- Data information was needed earlier on.
- Helpful to know what % of applications received were in each county.



## ***What do you see are some of the challenges and shortcomings of the overall WFTC program?***

### **Feedback themes**

Responses in both the listening session and survey shared common themes concerning challenges and shortcomings of the overall WFTC program. Participants shared feedback around issues checking refund status, check cashing, and supporting ITIN holders and those needing support in filing for an ITIN.

Themes include:

- Refund status and wait time for refund receipt/application processing.
- Providing ITIN support and finding ITIN services.
- Check option for payments.
- Clarify of language used in the program, requirements, and application.

### **Listening session and survey comments**

- The shifting timeline of how long people should wait to expect to receive the money posed challenges since we quoted 30 days to many people (per DOR's direction) and then it changed to 90 days. This resulted in many phone calls asking where their money is.
- Reaching the target areas
- Legislative shortfalls: Blanket income limits for the state and not region specific. -Access due to age
- I did hear some parents say that it took a while for them to receive their check.
- age requirements for qualifying children.
- lack of trust, access, knowledge for people who don't have ITIN. ITIN holders are already participating in filing taxes. Bigger barrier is reaching and building trust with those who have not applied for ITIN.
- Community trusted organizations – how orgs approach ITIN renewals/applications confusion, need clarification within community – hard to find free ITIN services.
- Language used in the tax credit program traditional (credit) versus money back or refund. Perhaps "refund" vs "credit"?
- Orgs had to explain and it took time to convince and educate.
- Communities' groups working together.
- Absolutely echo all of these comments.
- Check option was not feasible for address changes and direct deposit not an option for applicants without accounts. Prepaid debit card option would be great.
- Clarity around Washington state versus IRS. Challenging/confusing since the credit application needs federal tax filing - the relationship intertwined.
- Prepaid immigrant relief fund uses prepaid card. Challenges with prepaid too– people could not cash, scams on activation. Lessons learned from WAISN and DSHS. (DSHS Office of Refugee & Immigrant Assistance was the department responsible for the WA COVID-19 Immigrant Relief Fund.)
- Limited English Proficiency (LEP) selection at WA DOR for letters to be sent automatically in preferred language.
- I would have loved to hear outreach ideas as great examples.

- SAW account-access to application.
- Challenge was us quoting 30 days to get funds but after we told people for over a month it was 30 days, it turned into 90.
- The only negative I heard from people was that approval time took a while.
- The map with data on percentages of applications would have been better if it reflected the percentage of applications received per estimated eligible population.
- Confusion when it came to language about needing to qualify for the EITC (esp. because EITC requires a qualifying child)
- Early on the materials said you could be 65 and then it changed to under 65.
- The reporting process was not as clear. The information was changing which led to confusion. Having clear due dates and forms so we can plan would be great in the future.
- WA DOR system needs to auto check for duplicate applications.
- Lack of clear information on the website on changes. No information on the fact that the where's my refund tool didn't work, led to lack of trust with applicants/ community. Would have been easy to put a message on that page saying it wasn't working.
- Better Reporting process.
- More information on the Check refund status- should tell you if you were approved or denied at least or how much of a wait time you have/because some people are not receiving their letters.  
+1
- Need more free tax prep or even for hire tax prep assistance resources.
- Most free tax prep has ended, and we have had difficulty contracting help to assist with the application
- WFTC site link needs to be added to the [www.washingtonconnection.org](http://www.washingtonconnection.org) website - Yes Washington Connect would have been a great resource, I was surprised that our colleagues that use this did not have a way to screen through that service.
- Challenges in doing the outreach for individual filers because of the language "Working Families Tax Credit". There is an immediate assumption that you need qualifying children to be eligible. Assistance with materials in doing this outreach would help.
- We had some people who could not cash checks - maybe a prepaid card +1
- I also had to explain that you must live in Washington, not just work in Washington.

## ***What could the Department of Revenue have done better to support you?***

### **Feedback themes**

Participants shared ideas in ways that they could of have felt more supported by DOR. Feedback praised the fast and responsive work of the Outreach team and would like to see that carried forward for continued support.

Feedback themes included:

- Continue proactive trainings with additional focus on ITIN filers.
- More data to help outreach in targeted locations.
- Grantee process communications (invoice reporting, deliverable approvals, and cross-grant organization communications and collaboration.)

### **Listening session and survey comments**

- Perhaps quoting a longer time frame it will take to get the refund. If 90 days was quoted at the beginning of the tax season we would have set expectations accurately with taxpayers. We understand though that until you launch DOR had no idea that timelines would need to shift that much.
- Provided at the beginning a list of ideas for grantees.
- More consistent communication on invoicing and reporting. We have a difficult time hearing back in a timely manner which makes it hard to understand these processes without the support.
- I could have benefitted from more walk throughs of how to fill out the tax credit application so I had that down pat and could easily explain what was needed. But overall I think it was very well done!
- Heads up communications on when things launch or go out to public.
- Great job of the rollout – frustration in execution – down time at beginning and then mad dash to end/finish line.
- Clarity on approval processes deliverables.
- Website and materials/flyers/wraps/ on website was great but would have been great early and editable.
- Loved the series of detailed training sessions. Should have been earlier and more notice in process.
- Launch timelines pushed back and less quality (because of rush).
- Income training was confusing.
- Make it easier to get our events onto the DOR website calendar.
- LOL. lots of good learning / data. Ready for next round!
- I think support was great honestly.
- More proactive trainings and information on ITIN filers.
- Support was on point.
- Tabling was very helpful.
- Organization had coverage 4 counties that were spread over 2 DOR outreach regions so they had 2 DOR contacts.
- Perla was amazing, as were the outreach team - Fast and responsive +1
- It would have been awesome to have easily accessible (maybe even public) broken down data on where expected applicants are located to help target our outreach.
- Foster connection with other grant recipients – cross organizational feedback.
- Excellent support every step of the way. Thank you.

## ***What advice would you give new grantee organizations?***

### **Feedback themes**

Feedback from both the survey and listening session offered recommended advice to new grantee organizations. Much of this advice revolves around the recommendation to build relationships, collaborate, and network in addition to preparation and planning.

Additional feedback themes:

- Utilize outreach specialists (at DOR).
- Create marketing ideas and kits early and line up translation and interpretation resources for language support.
- Start campaigning and marketing right away.

### ***Listening session and survey comments***

- Write a lot of content at the start of the project and get it approved. This always proves to be an effective strategy. Amplify your reach with community partners sharing your content to their networks, newsletters and social channels. Get out there and meet people where they are at and speaking in their languages. Be agile as you do your outreach. Adjust as needed based. Have good communication with your internal teams and ensure people have the training needed so everyone can help field calls, help table and fill out WFTC applications. Consider running a VITA site too. Tax prep for low to moderate income individuals will allow you to serve those same people and electronically file their WFTC application. If you leave people to fill out their own application online through MyDOR or by paper, they may not make time to do it or do it incorrectly. Taxpayers are happy when VITA sites can do both tax prep and WFTC applications electronically at no charge.
- Need at least two people on the team in your organization.
- Keep the pressure of collaboration and accountability with the agency so the program can meet community's needs.
- Keep it simple. Don't try to do too many things. Focus on one or two things that you are good at.
- Utilize the outreach specialists in your area!
- Collaborate with other orgs in your area.
- Get language support / interpreters lined up. Prepare to have more reach in areas.
- Make a plan to spend.
- Start advertising campaign right away.
- Make connections with other grantees.
- Plan for in person outreach
- Don't complicate the message for your staff or the public.
- Have a backup plan to your original outreach plan. Ours didn't work out the way we wanted to, and we had to try and adapt
- Make more community partnerships that are willing to share your message and amplify your reach.
- Train your staff
- Build media relationships early.
- Videos in other languages are very helpful.

- Determine most effective way to target outreach to the population you most want to reach-- versus doing outreach to everyone.
- Always include sub-contractors, you can't do everything alone
- Some partnerships felt like a competition vs. collaboration.
- Leverage existing relationships within your organization and network - look at intersections ex. TANF, SNAP, Criminal legal system involvement, etc.
- Be strategic of where and how you do outreach depending in the community/target group.
- Use advertising dollars to not just market the WFTC in general, but to specifically advertise your application drives.
- Think about how to ask people who don't qualify to help amplify the message.
- Make materials in various formats and sizes. Create a marketing kit early on.
- Collaborate with other organizations to create audio/visual content in many languages :)
- Boosting social media posts and placing ads on Google drives people to you. Having a VITA site is very helpful.

## SUPPORTING APPLICANTS

### *How easy was it to apply for the credit?*

#### **Feedback themes**

The most noted feedback theme when asked about the ease of applying for the credit was issues involving accessing SAW accounts; however, most noted they didn't face major hurdles in the application once they were past SAW login. Applying through VITA site was perceived as easy.

Additional feedback themes included:

- Getting notification if you have already applied.
- Reducing length of application.
- Technology and support issues with online application.

#### **Listening session and survey comments**

- Phone support challenges – getting documents complete tax return/setting up SAW accounts/email access to manage account SAW account/application was achievable/language on application could use more clarification/ex. Investment amounts/AGI reference line number on return.
- Easy, other than the SAW account piece
- I didn't hear any complaints. Mostly just completely unaware the credit existed.
- Applying was easy, we just had checks issue.
- Once you got past SAW account information--very easy.
- It was super easy since we had a VITA site. Even on paper it was easy for people who had already done taxes elsewhere.
- The hardest part was accessing the SAW account. Beyond that, it was fairly easy. The next hardest part was when people filed their taxes, but didn't know where their copy of the 1040 was. It was hard to go anywhere from there.
- Technology barrier to using the online application - make it easier to submit paper forms (prepaid envelopes?)
- Would have been better if people were able to just upload the 1040 and it auto populate the information from the 1040.
- The application could have been shorter especially that the information is on the tax return already +1
- In TaxSlayer at our VITA site, it was super quick to apply for WFTC online at the time of doing taxes.
- Also agree with whoever already said that the application should automatically tell you if you already applied. People don't know if they already applied sometimes because of the different tax software.
- Need WA DOR app (Mobile app)
- It would have been great to have a list of tax preparers who automatically applied people for WFTC, so we aren't risking duplicating applications. +1

## ***In your view, what was the biggest challenge that potential applicants had?***

### **Feedback themes**

ITIN filing was a main feedback theme when asked about challenges applicants faced. This ranged from not knowing where one would go to get assistance with filing for an ITIN to ITIN filers were unsure if they would even qualify for the credit. Another theme was supporting and conducting outreach (including application drives) in rural areas.

### **Listening session and survey comments**

- The biggest challenge was knowing it was available. Once they learned of it through outreach, it was not a problem to apply either with our help or on their own. Also, it was a challenge that people were told they should expect to get the refund in 30 days and then after 30 days they found out it would be 90 days.
- Rural areas and applying
- Being charged by 3rd party tax preparers to file for the credit.
- I would have to give more thought to this one.
- Not having an ITIN and not knowing where to get help with that.
- Second that. Not knowing if/where to get an ITIN
- Not filing taxes and not trusting the system/government or understanding benefits of doing taxes
- It was new so they had to learn about it (awareness)
- Many ITIN filers didn't think they qualified. +1
- We had to educate.
- Technology/equipment was needed – remote counties - people had to travel to access equipment printing is in library.
- I am working with some very rural communities--just getting the word out about the tax credit was challenging, let alone scheduling application drives.
- Lack of access for ITIN filers. People getting charged fees, especially in Yakima/ Central and Eastern WA. ITIN filing process is very complicated, need more free services.
- Confusion on the requirements to qualify. Lots of initial dismissiveness whether because of the name, the age restrictions, the specific income limits. Had someone that got EITC and thought it was the same thing as WFTC.
- Would be great if DOR had CAAs on staff and offered free drives for ITIN filers.
- I had many specific questions regarding "why don't seniors qualify", "why does this only go up to three children".
- We heard some people who got charged \$25 or more to apply for WFTC. Unfortunately, they had first gone to another tax preparer.
- Also, confusion about where the money came from.
- Also, fears that filing after "tax" day would have consequences.
- Office of Treasury check is not intuitive.

## ***What could the Department of Revenue do to encourage and reach more potential applicants?***

### **Feedback themes**

An overwhelming amount of feedback provided various ideas on ways DOR could reach more potential applicants.

Feedback themes included:

- Collaborate with other state agencies to promote WFTC.
- More outreach about ITIN.
- Continue relationship building efforts – especially with employers and businesses (to connect grantee organizations for outreach events.)
- Pursue options for free tax preparation.

### **Listening session and survey comments**

- It would be good if there were extra funds for some organizations to continue doing outreach over the summer months until the next grant period begins. The summer months are when there are lots of community events and festivals so it is a prime time to reach many qualifying individuals and families. Another idea is to share more content that was created by organizations. One example is videos in other languages. If those are shared widely by DOR to other government agencies and on social channels, it will reach many people. We have shared content to other government agencies to include in their respective newsletters but DOR probably has many more government connections that would be willing to share a paragraph, link to the DOR page and a video. That type of outreach doesn't cost money other than the cost of staff preparing the communication and connecting with people that put the newsletters and social media posts together. It is important to continually let people know that they still have time to apply even though tax season is over.
- Outbound calls to those who may have qualified. Dialer system?
- Using other state platforms to conduct outreach. I.E., DMV, Voter registration, fishing licenses. Collaborate with other agencies to promote the WFTC on their websites.
- Share the stories of people who received the tax credit and how it easy it was to fill out and what they used the money for
- More outreach about ITIN and taxes well in advance.
- DOR open doors to employers – so community org can reach employees like lunch-n-learns. Local employers seemed reluctant to engage with organizations. DOR could help credibility and build relationships
- More funding
- Videos in even more languages that we can share.
- Have it not be a separate application. A lot of people talked about liking credits automatically applied to returns. +1
- Pursuing ways to further integrate it into the training of all tax prep and free software.
- Educate individual tax preparers so they know about the WFTC and can either assist filers with the WFTC application or refer them directly to us so we can assist them in filing for free. - Like EITC and CTC.



- Build on current relationships grantees now have in the community as a trusted resource for the WFTC. In this year, we have built more community recognition that they can come to us to apply, and I think building on that next cycle would be great.
- Encourage grantees to partner with tax filers or provide free tax filing. + 1
- Anything you can do to work with the IRS to make it so this process is more automatic.
- Process applications faster.
- Work to address stigma around cash benefits.
- Have a WFTC Awareness Day or Week just like the IRS does for EITC Awareness Day in January. Provide videos and other content and rally everyone to get a good cohesive outreach in preparation of tax season.
- Help clarify confusion with the qualification such as age requirement or income - making it free for businesses to submit, as simple as an application is for them to complete.
- Partner with DSHS to make sure everyone on TANF gets this credit.
- Businesses charging extra fees to apply to applicants – some folks may not have applied...
- Jackson Hewitt was charging people \$75 AND telling them it would be "faster"
- Would love if the credit could be a flat \$1200 for all families--\$1200 isn't much in the scheme of things annually especially with any children much less 3 in the household!
- It was helpful that Perla shared event on the WFTC calendar!

## ***Is there anything else you would like to tell us?***

### **Feedback themes**

All responses expressed appreciation for DOR's implementation of the WFTC program and the positive experience in working with the Outreach team. Feedback showed appreciation for the work efforts and resources provided.

### **Listening session and survey comments**

- Thank you for doing an excellent job at managing the WFTC program and making it a smooth process. It allowed organizations to learn details about the WFTC application, where to find more information, refund timelines, etc. We always felt armed with all the information we needed to do effective and timely outreach. We also liked how you were very open to us creating our own outreach materials too. One of the biggest keys to success was Perla's speedy review of all content we turned in. Often times we received approval within hours the same day we turned it in! This allowed us to reach even more people and not have delays in getting new content out to people. Additionally, the communication and collaboration between COMMERCE and DOR was evident at each monthly meeting. We felt very informed and supported from day one by both DOR and COMMERCE. Thank you to all of the people behind the scenes from building the online application, fielding questions, creating flyers in many languages, to name a few. It was an excellent team effort by all.
- I hope we get to continue to offer this outreach. It was a great project and I'm glad we were able to play a small role in helping parents access additional resources.
- Grantee reporting was simple. May need wanted more guidance describing activities – and expectations of reporting.
- Enjoyed working with local outreach specialist but had early confusion with roles and responsibilities. Missed opportunity on how to leverage local outreach specialist.
- Thank you for opportunity and the program has been amazing.
- The outreach toolkit was amazing. It was easy to share with our subcontractors as well.

### **How would you like to be communicated with?**

The preferred communication method for grantees was email.

- Emails and invitations to future meetings.
- Emails and Zoom meetings will be good.
- Emails +4
- Social media posts