

WORKING FAMILIES TAX CREDIT
GRANTEE LISTENING SESSION REPORT
May 2024





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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.

To ensure widespread publicizing of information about the Working Families Tax Credit (WFTC), the Department of Revenue (Revenue) has partnered with community-based and community-led organizations throughout Washington state. These partnerships focus on reaching residents who could benefit most from the program, particularly those in need of direct services within their local communities. For the 2023-2025 biennium, the legislature allocated \$5 million for community outreach grants to support this initiative.

For the 2023-2025 biennium, [27 organizations](#) have been selected to conduct outreach for the Working Families Tax Credit program. Like the previous year, the recipients include a diverse group of non-profit organizations, small for-profit businesses, and organizations serving minority groups and tribal governments in Washington state.

Continuing its commitment to engage and support these organizations, Revenue hosted two virtual listening sessions in May 2024. These sessions provided a platform for grant recipient organizations to share their experiences and discuss challenges and successes in implementing the outreach program.



LISTENING SESSION APPROACH

Grantee listening sessions were conducted via Zoom and featured a format with designated roles to include a facilitator, meeting host, and note-taker. Each session covered the same questions. Attendees were required to register to attend.

Listening sessions were promoted by the WFTC Outreach team directly to the grantee organizations.

During the listening sessions, grantees were encouraged to provide their feedback, both verbally and via meeting chat. The listening sessions were not recorded. For those unable to attend the listening sessions, a survey was available that included the same questions and themes as shared in the listening sessions.

The listening sessions were held:

- Tuesday, April 30, 2024, at 3:00 p.m.
- Wednesday, May 1, 2024, at 3:00 p.m.

ATTENDANCE

The listening sessions were attended by a total of 19 participants. We received one survey response. Between the listening session and the survey comments, we collected over 140 comments in total.

The map below illustrates areas of the state represented.



Map of Washington state illustrating areas of the state represented in the listening sessions and survey participant.

The chart below demonstrates the diverse range of organizations involved in the WFTC program and the number of representatives in attendance from each grantee organizations.

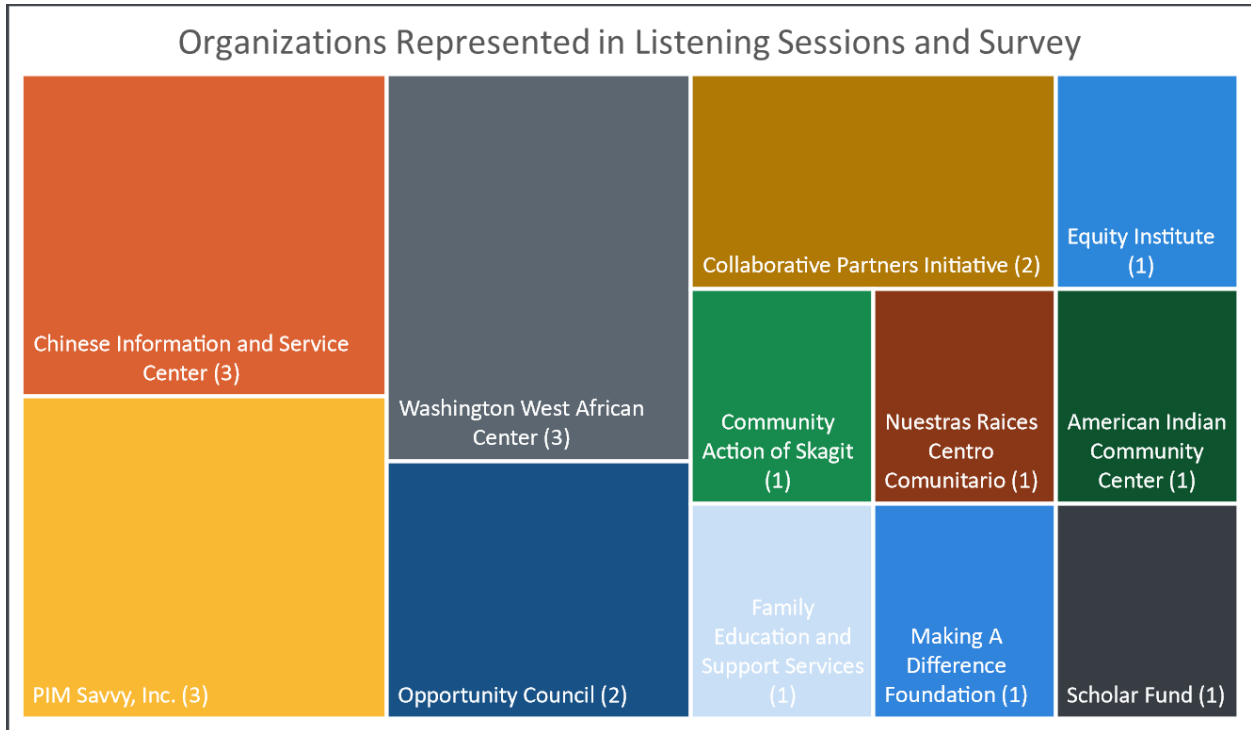


Image showing organizations represented in both the listening sessions and survey submission.

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 agree that the overall goals and objectives were reasonable and achievable. Many grantee organizations, now in their second year, have noted that their operations have become more efficient with multiple years of experience.

Noted challenges include:

- Reporting tool was received “late”, creating uncertainty regarding the expected reporting requirements.
- People do not know if they have previously applied.
- Community outreach is difficult in winter months. It is anticipated to be much easier in summer.

Listening Session and survey comments:

- Yes x8
- They were reasonable and achievable there are a few things that need to be understandable and define eligibility. We are very happy with the contract and going to rural areas.
- This is our second year the more you do it the more you have experience. The funding could have been a little more. I’m glad we have but that it was bumped up to do more. Some community members were disappointed because some were getting less than what they thought they would get. For reporting I don’t think we have any problems. There are no significant problems. More confident to do this and hope this continues to benefit the community.
- Reporting tool was received late and hard to know what was expected to report and knowing what to track otherwise all was great.
- The goals were good, and we were in the grant the first year. It was challenging in January to reach out to people and find people. The new year in July we can go to farmers market so people know we will be there to help with taxes. It was hard in the cold but otherwise it was good.
- Question: someone was trying to claim for WFTC, and they were told that someone had already filed the 1040?
- Paper application, another through partners, and with IRS e-file.

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- Some software you can file the 1040 and WFTC – example TaxSlayer will let you know if you qualify for WFTC and will allow you to file both.
 - Some have integration like H&R
 - Website has the information of those we have partnered with.
 - Good to know about this so that we can help the community.
 - Depends on private preparer- some private are choosing not to use the software and since it's not related to the IRS.
 - Some are not printing the copy of the document and people don't know if they have applied.
 - We gave the information in the communities.
 - The people understand when its personal.

WORKING WITH THE DEPARTMENT OF REVENUE

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

Feedback themes

Responses in both the listening sessions and the survey indicate that the Department of Revenue implemented several measures to facilitate success. These included substantial support from the Outreach team, frequent meetings and updates, the availability of outreach materials in multiple languages, and free access to materials online.

Noted common responses include:

- Access to materials, in multiple languages, online.
- Abundance of support through regular meetings and trainings.

Listening Session and survey comments:

- Plenty of support with regular meetings and feedback.
- Training
- Getting the information out to the community we serve. Many were aware of the WFTC.
- Great support.
- Updates at the meetings, covering the technical part, like reading the tax return, in language materials.
- All the information we can get online.
- Outreach materials in languages.
- Many already aware of the program itself and were happy with the additional languages and having an easy-to-use website.
- I liked being able to order materials for free online. I also ordered them for partner sites. x2
- The training, the meetings were wonderful and very useful. Getting familiar with many things and the problems that other people have and how to respond.
- This year was very successful and appreciate being able to do both years.
- Perla and her team are great with meetings after meetings and building their capacity online.
- Perla and team are very phenomenal.
- The participation old different organizations to let different communities know.

WORKING WITH THE DEPARTMENT OF REVENUE

What did you see are some of the challenges and shortcomings of the overall WFTC program?

Feedback themes


Responses in both the listening sessions and the survey highlight that complicated tax issues pose challenges to them. Many noted that they are not tax experts and face difficulties navigating the extensive information required. At times, a client may not qualify, and they want to know why, or instances where incorrect information was received from tax preparers. It was suggested that it would be helpful if Revenue could implement a newsletter specifically designed to inform businesses that prepare taxes.

Noted challenges include:

- Lacking resources to assist clients who present unfamiliar tax forms.
- Encountering instances where clients do not qualify for benefits without clear explanations as to why.

Listening Session and survey comments:

- Large decrease in funding this year compared to last year.
- Technical - we are not tax experts. When clients brought in tax forms that we are not familiar, sometimes, we may not have resource to support these clients.
- Sometimes when we see the tax return it appears that they appear but then within the system they do not qualify, and the client does wants to know why. We are not tax experts.
- When people come to me, and they have wrong information that they have to pay next year or that it is bothered money. They get wrong information from the tax preparers. DOR can do a newsletter to inform business' that prepare taxes. x2
- We ran into you people that are younger than 25 because its 25-65.
- I don't know why it was capped at \$65,000, is there an explanation for that?
 - Based on the IRS EIC
 - The federal EIC credit has the same parameters as the WFTC program.
- Too much information to go through – it was too much information. Suggest on a 2–3-page flyer so we can distribute to people with key information.
- Is it possible or not for the next year to be for younger people?
 - Our statute is tied to the federal criteria. The federal program has the age of 25-65. We are aware of, but we don't have control over it both for age and income thresholds.

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- The advocacy that can help with changes by reaching out to government representatives.
 - I liked being able to order materials for free online. I also ordered them for partner sites. I know this is in the works but having the online application in a few more languages will be great. We have lots of Punjabi speakers here.
 - Also, Russian, and Ukrainian- I'm in Whatcom County.
 - The people say that everything is at a higher price. The refund is a little low.

WORKING WITH THE DEPARTMENT OF REVENUE

What advice would you give to new grantee organizations?

Feedback themes

Responses in both the listening sessions and the survey suggests several pieces of advice to new grantee organizations.

Noted recommendations include:

- Space out appointments to allow thorough review of each tax return before proceeding. Additionally, ensure that all pages of the return are uploaded and utilize a user-friendly scanner for optimal document management.
- Utilize the documents and trainings available on the Google Drive.

Listening Session and survey comments:

- Space out the appointments because the time needed for each application varies.
- Check signature at the tax return before proceeding.
- Get a user-friendly scanner. x2
- Staff who speak non-English languages are invaluable.
- Be sure upload all pages of the tax return. x2
- Utilize questions and answers in google drive.
- Learn from other organizations that have done this in the past.
- For us it's the first time for the VITA site, to meet an organization they did it before. Once we did that it was a complete game changer. At first it was intimidating; we went to the organization that did it before and help guide you through the process would be good.
- If you are working with people that are using ITINs and know that the EITC they will not qualify for the child tax credit, and they are not being turned away people they don't know that they can qualify for the WFTC.
- Continue working with the community.

WORKING WITH THE DEPARTMENT OF REVENUE

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

Feedback themes

Responses in both the listening sessions and the survey indicate that while the Department of Revenue did a great job, there is a desire for a designated point of contact at DOR for technical questions related to the tax returns and for verifying whether an individual has already applied for the credit. It was even suggested to add a button to the online application for previous years, so that one does not have to refill out the application.

Noted sample of responses include:

- Department is doing a great job implementing a new program.
- Increase TV advertising could help address public skepticism regarding a government credit.

Listening Session and survey comments:

- DOR was great. x2
- Point of contact for technical questions? x2
 - Specifically, about tax returns
- All the questions are the same only the 1Z or self-employed is different – any way to improve application. Add a button to include other years like 2022 instead of refilling out.
- Lots of CPA are not including the sheet that confirms that they have applied. Is there any way to check.
- Yes. Ditto. We helped a lot of files to file 2022 WFTC as well.
- Doing more TV advertising- some of the families are suspicious as to why the government wants to give out money. They didn't know about this program but if they hear on YouTube or something.
- Turnaround time for credit cut from 90 days max to 60 days max.
- It's okay.

WORKING WITH THE DEPARTMENT OF REVENUE

Now that tax season is over, your outreach strategies may be different. How can the Department of Revenue continue to support you?

Feedback themes


Responses in both the listening sessions and the survey indicates a desire for periodic messages to enhance general awareness on several key aspects: how to check the status of applications, continuing training for staff, ongoing multilingual support and materials, and strategies for organizing more events and distributing flyers to report any updates.

Noted common responses include:

- Updates to promote awareness of WFTC.
- Continued outreach events and information tables.
- Geographic analysis revealing what areas are underserved or lacking resources and support on the credit.

Listening Session and survey comments:

- Messaging - periodical messages (in-language) to promote general awareness of WFTC on regular basis.
- Check status of the application.
- Provide tax filing training to staff? Staff who work for this project.
- We feel reluctant because we are not tax experts. At least to provide tax filing support and tax filing process. A lot of staff caught mistakes made by tax filers where the names, SSN, DOB do not match and how to help clients get help. What the process would be to help them correct the mistakes and good to know.
- Learn how to check and the letter from DOR is something related to WFTC.
- With different languages with Ukrainian and Russians to reach those people.
- Doing more events and tables- get someone from DOR to come up to some.
- Is there a way to know where the least applications have been processed geographically?
- Maybe to know what areas are not getting the info or the service.
- Is there way to find data that tells us what an organization performance is? Is there a performance review?
- We do have in our performance measures where we are getting more applications by county. It's not updated on the website, but we are working on it. We want it to be interactive, sometime this year.

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- As to grantees – we can talk to commerce about, and it will be internal to know how the great work you are doing.
 - If our community is doing the enough outreach, to review what is the problem and only reaching and organizations can go back to revisit and correct the problem to outreach.
 - Flyers or report any changes.

SUPPORTING APPLICANTS

How easy was it to apply for the credit?

Feedback themes

Responses in both the listening sessions and the survey indicate that the application process for the credit was “easy” and user-friendly. It is stated that both the online and paper applications are straightforward, and the availability of applications in multiple languages, along with assistance from Volunteer Income Tax Assistance (VITA) sites, enhanced the ease of the application process.

Noted suggestions include:

- Update the application process so that clients can apply for the credit with “just a few clicks”.
- More clarity and/or explanation defining qualification factors concerning dependents, particularly for individuals unfamiliar with tax preparation.

Listening Session and survey comments:

- Very easy x3
- Very user friendly, both online and paper application!
- Very easy, especially for VITA site who could do federal tax and WFTC.
- The paper applications in different languages were also very helpful!
- The application process is very straightforward in general. However, as mentioned, we need to pause if we spotted any errors on the tax return.
- To make it easier, can clients apply the credit for previous years in a few clicks?
- The application process was honestly easy and straight forward.
- The process is easy, although the questions about the dependents do cause some time consumption that I am still unclear on. Specially for people that have never done tax prep.
- Somewhat easy. Many people did it to them whoever did their taxes.

SUPPORTING APPLICANTS

How did applicants or potential applicants hear about the credit?

Feedback themes


Responses in both the listening sessions and the survey shared common themes as to how applicants or potential applicants heard about the credit. The most common feedback responses were mailers, social media, and word of mouth.

Noted common response include:

- Mailers, billboards, and outreach.
- Word of mouth (community and family).

Listening Session and survey comments:

- In Skagit county – not a lot of people were aware of the program. There was a new person appointed to this area and there should be more efforts in the area.
- From mailers and billboards.
- Words of mouth and social media.
- Small community, word of mouth, outreach.
- Also, word of mouth and Facebook when we held events.
- Most heard about the tax credit through flyers we handed out and through word of mouth from family members.
- Messaging from partners, postcard mailers.
- All people from my community come to us because they saw flyers around.
- Word of Mouth...Community Partner Case Managers.
- If DOR can advertise on social media, YouTube, so they can hear that and be familiar with that otherwise they are very suspicious.
- For us it was social media, but a lot of word of mouth in rural areas, I would say more than half were word of mouth in rural areas.
- Although I had one client that did the eligibility test, she qualified for \$620 but at the end she was approved for \$120 I believe, and the person thought maybe I didn't do it well.
- Once we served or tabled in an area, they just spoke about it to their families, co-workers etc., and we received an overwhelming number of calls.
- Rural areas it was a lot of word of mouth.
- We had a lot of people walk in to apply after we did our outreach on Facebook.
- Different strategies events we do and others by other partners.
- We will do events with state agency and across the state.

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- Our own events and those by others one strategy; creation by audio visual messages; we have created multiple songs so far using influencers and top musicians that our community then we share on our websites that people follow, and we have partnerships with them that share this content.
 - Our outreach is very successful – they stigmatize themselves but sometimes they prefer to go through family or friends.
 - Maybe ask those people from the application and ask on the application how did you hear about this or who helped you.
 - Have a drop down with organizations on the application for people to list who they heard from us.
 - When they have problem, they come back to us, but we did not help them, and we found out they had incorrect information but if they have issues they come back to us and come to the office to get help.
 - For the information provided by the organizations and friends.

SUPPORTING APPLICANTS

Based on feedback from last year, we made several changes including adding prepaid debit cards and improving our online application to reduce errors. Do you have any suggestions to improve the application next year?

Feedback themes

Responses in both the listening sessions and the survey consistently suggests the need for a mechanism to verify whether an individual has already applied for the credit before applying (again).

Noted feedback responses include:

- Implement a way to confirm whether or not an individual has already applied for the credit before submitting another application.
- Add a list of organizations to the “How did you hear about us?” question.

Listening Session and survey comments:

- Have a way to verify if they already received the credit prior to applying.
- A client was being helped through the process and it turns out that they had already done the WFTC for that year and the previous year. If there was a box where it said that they had already completed for that year. In looking through the paperwork it showed that they had already completed it.
- Account for staff who provide application assistance to track the process.
 - And look up for application in the past.
- I second that comment. The same thing happened to me with an applicant.
- How did they hear about us and include a list of organizations?
 - The question is listed but not with the organizations listed.
- Just the questions on the dependents.
- No

SUPPORTING APPLICANTS

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

Feedback themes


Responses in both the listening sessions and the survey highlights that the primary challenge for applicants is arriving to appointments with the necessary documentation. Additional difficulties include language barriers, particularly languages other than Spanish, confusion regarding costs associated with applying for the credit that is intended to be free, and a general understanding about the source of the credit were also noted as significant challenges.

Noted challenges include:

- Forms are not available in all languages.
- Lack of understanding of the U.S. tax system.

Listening Session and survey comments:

- Collecting documentation and arriving to appts with proper documentation.
- Language barrier for other than Spanish.
- Not understanding the taxation system in US, Federal credits, and state credits... etc.
- We heard feedback from the community members, some of them said that they must pay additional if they want to apply for this credit. It's supposed to be free, but this is what tax preparers do with people that are very poor.
- I second that comment.
- West African languages are not written, and we do outreach.
 - It could be that someone is busy.
 - The grant does not allow us to hire additional staff including interpreters.
 - The language is not written, and someone helps them.
 - Empowering organizations to hire more people to translate.
 - The turnaround time for 2 months and they did not hear anything and if it is an email they do not know – our communities do better with calls maybe that would help for those that do not read or write will not be very effective.
- The other challenge is individual capacity -they want to do it and they don't have basic skills and more a personal choice and we do not how to resolve this.
 - The more people that know how to do it the more people that will do it.
 - More education and use computer and understand the process.

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- Understanding where the credit came from and confusing the work credit with the financial term, at least in our communities.
 - Some people talked about their number of qualifying children or more it's the same refund.

SUPPORTING APPLICANTS

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

Feedback themes

Responses in both the listening sessions and the survey suggest that Revenue could enhance its outreach and encourage more potential applicants by distributing mailers and increasing engagement on social media platforms.

Noted common responses include:

- In-language mailers
- Continue to promote through organizations and social media platforms.

Listening Session and survey comments:

- In-language mailers.
- DOR is almost doing everything that they can do, and they have partnered with all the grantees, and we go into our own communities, it would surprise me if they didn't know about it. Now if they don't how to apply for it's different.
- Increasing funding will provide resources to reach more people.
 - Give more resources for outreach, advocacy, and education.
- Some of the applicants filed their taxes - married filing jointly and therefore their total income doesn't allow one of spouse to qualify for the WFTC even though they have worked the previous year and want to file the WFTC. Will there be any accommodation for such applicants next year so they will be able to receive the credit?
 - In general, how they file the application must match what they have on their federal income tax returns. It will have to be the same status they use for WFTC we would not be able accommodate.
- What is the history behind WFTC?
 - WA isn't an income tax state, most other states have an income tax. To help with those that are not making that much money – it's a refund of sales tax not EIT credit. An attempt to reverse the tax on those that earn less money to fix that disparity.
- Organizations and social media.



GENERAL QUESTIONS

Is there anything else you would like to tell us?

Feedback themes

There was significant appreciation and support for the program. It was shared that there were testimonials confirming that recipients received the credit, and it was helpful to them.

Listening Session and survey comments:

- For me it was gratitude and good opportunity to support this program. Because people did apply, and some people shared with me that it was real that they had received their refund and it was helpful to people.