



Office of

**Community Empowerment and Opportunity**

CITY OF PHILADELPHIA

**The City of Philadelphia | Office of Community  
Empowerment and Opportunity**

Expanded Child Tax Credit Outreach Campaign  
Evaluation

Final Report

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Government  
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## OVERVIEW

The purpose of this report is to assist the Office of Community Empowerment and Opportunity (CEO) to evaluate the implementation of the Expanded Child Tax Credit Outreach Campaign. A child tax credit (CTC) is a tax break for individuals with low-income who claim child dependents on their tax returns—commonly parents, step-parents, or whoever the child’s legal guardian is. After the American Rescue Plan Act of 2021 temporarily lowered the qualifying income threshold and raised the credit amount, CEO launched the Expanded Child Tax Credit Outreach Campaign; a city-wide effort to spread awareness of these modifications to the child tax credits and connect Philadelphians to tax-filing resources. This evaluation combines elements of a process and program evaluation and will seek to aid stakeholders in understanding how the Outreach Campaign developed, was successfully implemented and its impact. This evaluation has been driven by the following overarching goals:

**Evaluation Goal 1:** to aggregate disseminated information from various stakeholders engaged in the Expanded Child Tax Credit Outreach Campaign to provide CEO with perspective on the Campaign’s development.

**Evaluation Goal 2:** to examine how components of the Expanded Child Tax Credit Outreach Campaign interacted with each other and estimate the impact of those components on CTC eligible parents and guardians, as well as Campaign stakeholders..

**Evaluation Goal 3:** to provide actionable feedback and recommendations for future child tax credit—or expanded child tax credit—outreach that CEO will conduct.

Therefore, this evaluation focuses on:

- The **context** in which the Campaign was operating.
- The **implementation** of the Campaign.
  - The **extent** to which the Campaign was **delivered as planned**.
  - The **quantity** of outreach partners, information, activities and services that constituted the Campaign.
  - The **adaptability** of the Campaign in the face of changing circumstances.
  - How **prepared the CEO Office was** and **how prepared partnering organizations** were to launch the Campaign.
  - The **accessibility** of the outreach information, activities and services that constituted the Campaign and the presence of diverse touchpoints to connect with all Philadelphians.
  - The **quality** of the outreach information, activities and services that constituted the Campaign. Quality is defined as 1) how well Campaign partners initially disseminated information that was straightforward and understandable and 2) how well Campaign partners were able to answer questions.
  - The **extent** to which the Campaign **utilized communities of proximity** in their outreach.
  - How stakeholders **developed professionally** as a result of their involvement in the Campaign.

- The **impact** of the Campaign.
  - The progress the Outreach Campaign has made towards short, intermediate and long term **objectives**.

Mixed-methods qualitative data was utilized to evaluate the Outreach Campaign in the form of surveys, group and individual interviews, and analysis of partner organization reports. Implementation evaluation questions were developed from the above codes. Indicators were developed to measure the short, intermediate and long-term impact evaluation questions. Finally, this report concludes with in-depth findings and corresponding recommendations. Background on the COVID-19 pandemic, the American Rescue Plan Act of 2021 and child tax credits is provided in the appendices, as well as the timeline for the Expanded CTC Outreach Campaign events and organization planning tools to assist the Office of Community Empowerment and Opportunity in implementing future outreach.

## Overview of Findings

These key findings emerged from analyzing interview, survey and partner organization data, though more detailed findings can be found later in this report. The findings are color-coded to the corresponding recommendations below:

- The Expanded Child Tax Credit Outreach Campaign engaged **40 organizations** across the **private, nonprofit, government and philanthropic** sectors.
- Although the Campaign was able to quickly scale contact efforts and adapt to unforeseen obstacles, participating organizations had **distinct roles and responsibilities** that confused **eligible filers** and **partner organizations** alike.
- The COVID-19 pandemic, varied and silo-ed processes across City agencies, insufficient outreach infrastructure, limited tax awareness, pandemic funding cuts to partner agencies and **vague branding** of the expanded child tax credit **limited the efficacy** of the Expanded Child Tax Credit Outreach Campaign.
- Philadelphia residents experienced **barriers** in accessing the expanded child tax credit. These barriers included fear over sharing information, accessing internet and language services, **disputes with other caregivers** and obtaining proper documentation, including hard copies of identification documents.
- Eligible filers were **confused** by the Internal Revenue Service portal, who to contact after observing marketing materials, **criteria necessary to claim a child**, and whether they'd be required to give the credit back.
- Partner organizations were limited in their ability to provide eligible filers **information** about **complementary services**.
- Campaign partners were able to launch almost **405,000 text messages**, over 35,000 phone calls, over 14,000 seconds of radio ads, over 14,300 fliers and palm cards, and interacted with residents through 14,000 website clicks, over 5,000 digital advertisement clicks and 4 information events across 7 touchpoints in an effort to reach as many Philadelphians as possible.
- A **preliminary estimate of \$38.7 million** was returned to low-income parents and guardians in Philadelphia across partners engaged in the Expanded Child Tax Credit Outreach Campaign.

- Engaging **grassroots organizations lessened** the **fear** eligible filers experienced around filing for the credit and the **flexible nature** of the funding grassroots organizations received allowed them to create outreach that was most **effective** for the **particular** communities they served.
- Grassroots agencies expressed a desire to be engaged in the **planning process** as it would **align outreach efforts** between the City and community-based organizations as well as allow grassroots organizations to **coordinate** with each other.
- Partner stakeholders expressed **direct, proximal outreach** more **effectively communicated information** than marketing materials.

## Overview of Recommendations

More detail and context for these recommendations can be found later in this report.

- **Scale tax assistance partner call centers.** Interviewees indicated parents and guardians were confused when contacted by people who could not answer their tax-specific questions. In addition, marketing materials distributed about the expanded child tax credit lacked a phone number or email address in which interested parents could call and ask questions. Thus streamlining the phone contact process to just one organization that is able to answer tax questions, could result in a higher level of engagement and assist parents and guardians in resubmitting if their returns are initially rejected.
- **Promote the ways in which the child tax credit has changed.** In many of the CEO marketing materials, the child tax credit was described as a “new” program rather than modified. Parents may have seen the marketing but disengaged with the Outreach Campaign due to historically not qualifying for the traditional tax credit. Thus, running advertisements—at least preliminarily—announcing the credit has changed could increase the number of parents who file.
- **Create and market a flowchart for determining whether a caretaker is eligible to claim the child tax credit.** 1,528 returns submitted on the getctc.org website were rejected because the filer had already submitted a 2020 return or they or their child were claimed as a dependent on someone else’s return. This finding is supported by interview data from partnering organizations as clients reported confusion and disputes between caretakers. Clarifying the criteria required to claim a child for the CTC through situational flowcharts and posting these to partner organization websites can assist guardians in determining their eligibility.
- **Internally market an outreach campaign partner organization chart and resource list.** Partner organizations indicated uncertainty in regards to which organizations were involved in the Outreach Campaign, what components each organization was responsible for and where to direct individuals to get resources to overcome barriers preventing them from filing for the credit. Having a readily available resource list of nonprofits per neighborhood that supply solutions to those barriers can assist staff members performing direct outreach.
- **Continue to focus efforts on text communication.** Mapping text message communications onto returns filed and website interactions shows this communication garnered engagement from residents. Using text messages to

direct guardians to only the getctc.org website or a platform they could use to file for the tax could simplify the process for residents. In addition, the phone number of a tax assistance partner calling center could be added to these text messages. This would connect parents and guardians who need more direct assistance filing for the credit or those who have more detailed, specific tax questions, to a tax assistance organization.

- **Engage grassroots organizations sooner in the outreach and planning processes.** There may be some Philadelphians who qualify for the child tax credit who are not already connected to government assistance. Thus, engaging grassroots organizations in the outreach process is very beneficial for accessing this group of people. Engaging grassroots organizations as early as possible in outreach efforts will increase the likelihood that the Outreach Campaign will reach Philadelphia guardians who've previously been unconnected with the credit. Indeed, grassroots partners expressed they'd be able to align their marketing efforts and prevent duplicating outreach efforts if they were more connected with each other and more involved in the Campaign planning process.

## BACKGROUND

### Child Tax Credits

The Taxpayer Relief Act of 1997 established federal child tax credits and forgave a portion of federal income taxes for eligible recipients. Child tax credits are provided for children with valid social security numbers in the United States whose parents make under a certain amount of money annually. Up until March 2021, the child tax credit consisted of \$2,000 per child distributed with tax returns in the spring of the following year. In March 2021, the American Rescue Plan temporarily increased the amount of the credit, the frequency of its distribution and reduced how much income parents needed to make to qualify for the credit. This more accessible version of the credit is referred to throughout this report as the “expanded child tax credit”. As the expanded child tax provisions only applied to the 2020-2021 tax season, the child tax credit returned to the amount, frequency and qualifying income levels stipulated before the American Rescue Plan.

### COVID-19: Effects on Philadelphia Low-Income Households

The COVID-19 pandemic has caused financial hardship for families with low-income across the United States. Low-income individuals lost jobs at five times the rate of middle-class workers and by April 2020 the employment rate for individuals making an income of less than \$27,000 annually had decreased by 37.5%.<sup>1</sup> In Philadelphia, as in cities across the United States, the impact of the COVID-19 pandemic on employment has been devastating. From 2019 to 2020, the unemployment rate in the City of Philadelphia

<sup>1</sup> Benton, et al. *The Impact of the First Year of the COVID-19 Pandemic and Recession on Families With Low Incomes*, September 2021, Institute for Research on Poverty at the University of Wisconsin-Madison, <https://aspe.hhs.gov/sites/default/files/2021-09/low-income-covid-19-impacts.pdf>

increased from 5.5% to 12.2%.<sup>2</sup> Similar to national trends, 2019 to 2021 job losses have overwhelmingly occurred in Philadelphia industries that pay relatively low wages.<sup>3</sup> Though many sectors of Philadelphia's economy have experienced job declines, certain sectors have undergone more losses than others. As observed in Figure 1, employment in the leisure and hospitality sector decreased by nearly 25,000 jobs between 2019 and 2020. Jobs in the leisure and hospitality, retail and trade, other services and healthcare and social assistance sectors of Philadelphia's economy provide the lowest median earnings in Philadelphia. These jobs provide median earnings of \$21,100, \$25,800, \$30,300 and \$42,400 respectively.<sup>4</sup> Additionally, these sectors comprise the majority of Philadelphians earning the minimum wage. In 2020, according to a study by Pew Charitable Trusts, the most common occupations of minimum wage workers in Philadelphia were accommodations and food service, health care and social assistance, retail trade and educational services.<sup>5</sup> Though not all Philadelphia workers employed in these sectors make the minimum wage,

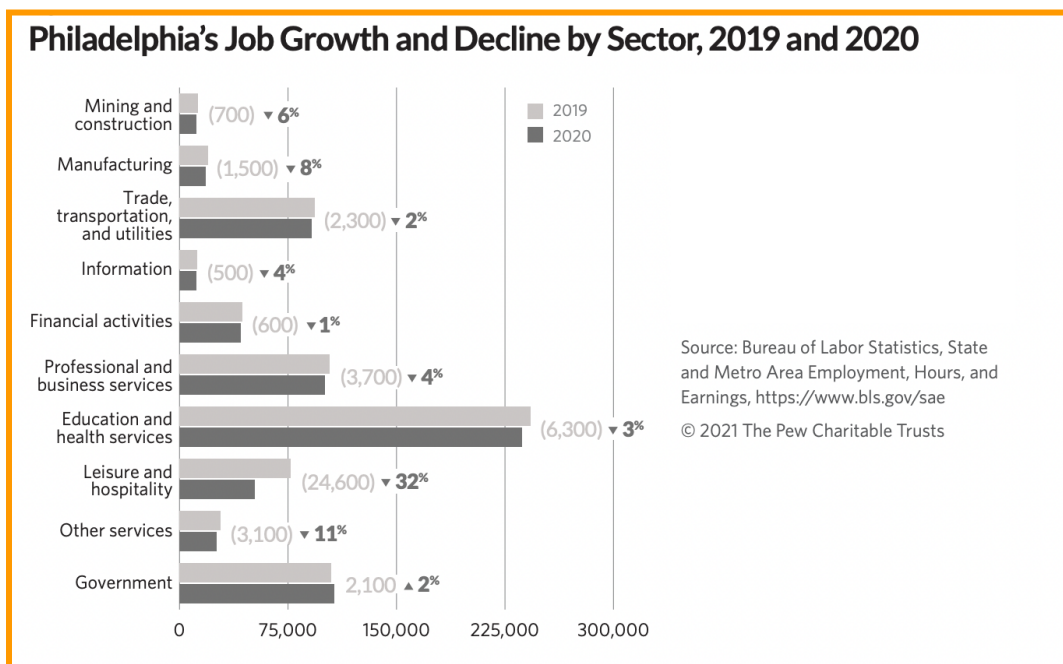


Figure 1. Job gains and losses by sector in Philadelphia, PA. *Philadelphia 2021: The State of the City*, April 2021, Pew Charitable Trust, <https://www.pewtrusts.org/-/media/assets/2021/04/philadelphia-2021-state-of-the-city.pdf>.

those that do earn the federal minimum of \$7.25/hr.<sup>6</sup> Those earning the minimum wage are affected more directly by the pandemic due to the nature of their occupations. Jobs in these industries require employees to interact with a constantly changing, large group of

<sup>2</sup> *Philadelphia 2021: The State of the City*, April 2021, Pew Charitable Trusts, <https://www.pewtrusts.org/-/media/assets/2021/04/philadelphia-2021-state-of-the-city.pdf>.

<sup>3</sup> Swall, Lexy. *How the Pandemic Has Affected Philadelphia's Economy and Jobs*, 9 February, 2022, Pew Charitable Trusts, <https://www.pewtrusts.org/en/research-and-analysis/issue-briefs/2022/02/how-the-pandemic-has-affected-philadelphias-economy-and-jobs>

<sup>4</sup> Ibid.

<sup>5</sup> Swall, Lexy. *How Philadelphia's Minimum Wage Compares with Other U.S. Cities*, 20 May, 2020, Pew Charitable Trusts, <https://www.pewtrusts.org/en/research-and-analysis/issue-briefs/2020/05/how-philadelphias-minimum-wage-compares-with-other-us-cities>

<sup>6</sup> Ibid.

consumers, thus their risk of contracting COVID-19 is inherently heightened. Additionally, jobs within these industries are least likely to offer health insurance, paid sick leave or the ability to work from home.<sup>7</sup> Without health insurance, families facing poverty or near poverty conditions lack the monetary resources necessary to cover the medical costs of COVID-19 infection. Even if workers with low-income are able to recover from their illness without seeking medical attention, the financial impact of staying home from work is far-reaching and further threatens their economic stability. Finally, even if workers have been able to avoid infection, any exposure to friends, family members or coworkers would require them to be quarantined, and to refrain from working, in order to stop the spread of the disease.

## The American Rescue Plan Act of 2021

Given the financial hardship caused by the COVID-19 pandemic, Congress and the Biden Administration passed the American Rescue Plan Act (ARPA) in March 2021. Of most importance to the Expanded Child Tax Credit Outreach Campaign, ARPA modified the child tax credit in three significant ways:

- It increased the credit from \$2,000 per child to **\$3,000 for children ages 6 to 17** and **\$3,600 for children under the age of six**.
- It allowed families to receive this credit even if they **earned \$0 in 2021**. Individuals who did not earn enough to file for taxes—less than \$12,550 annually for single people under the age of 65—received the credit through a non-filer process.
- Finally, families were able to receive half of the credit in monthly advance payments starting in July of 2021 as opposed to receiving only one lump sum refund in April of 2022. Individuals who filed taxes in 2019 or 2020 were eligible for advanced payments. Individuals who did not earn enough to file their taxes were required to enroll in the non-filer process by November 15th, 2021 in order to receive advance payments. For low income families who were not aware of the federal child tax credit expansion, **advance payments could still be delivered after the November 15th deadline** but individuals had to **file their 2021 income taxes (their earned income form 2019-2020)** in order to receive it. Advance payments were for **\$300** distributed on the 15th of each month between July 2021 and December 2021 for individuals with **children five years or younger, \$250 a month for kids age 6 to 17**. The **remaining sum was distributed in the tax season of 2022** that opened January 24th, 2022 and closed April 18th, 2022.

As mentioned above, these provisions to the child tax credit were temporary and reverted back to previous payment amounts for tax year 2022. However, the expanded tax credit is **still available for up to three years after the April 18th, 2022 deadline** for low income families that file their 2021 income taxes.

## Expanded Child Tax Credit Outreach Program Timeline

Acknowledging the information gap between government assistance and families with low-incomes, CEO launched an Expanded Child Tax Credit Outreach Campaign in the summer of 2021. This campaign consisted of multidisciplinary efforts across a number of

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<sup>7</sup> Ibid.



cross-sector agencies and was estimated to have the potential to elevate 75,000 Philadelphians out of poverty. Figure 2 provides a high-level overview of the campaign's efforts from April 2021 to June 2022 following the expansion of the CTC under the ARPA.

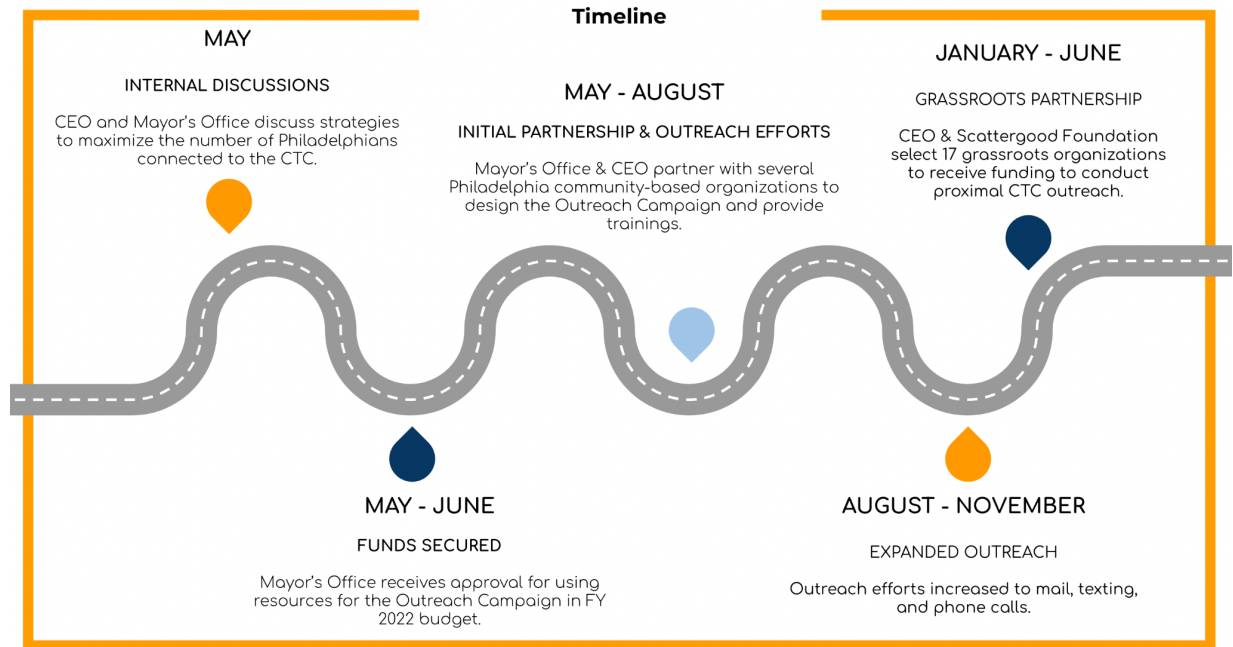


Figure 2. Timeline of Expanded Child Tax Credit Outreach Campaign events.

## METHODOLOGY

### Interview & Survey Design

A multi-step approach was developed to evaluate the Expanded Child Tax Credit Outreach Program.

- **Step 1:** Develop a mission statement for the Campaign to guide the development of a logic model.
- **Step 2:** Develop a logic model to organize and articulate the intended impact and goals of the Expanded Child Tax Credit Outreach Campaign.
- **Step 3:** Determine whether a program or process evaluation would be the most appropriate for CEO needs.
- **Step 4:** Develop a list of context, implementation and impact questions that could be asked as a part of the evaluation.
- **Step 5:** Determine which evaluation method is appropriate for each question.
- **Step 6:** Conduct data collection. In total, 12 survey responses were collected and 20 people were interviewed.
- **Step 7:** Triangulate survey and interview data with existing data from other organizations involved in the Expanded Child Tax Credit Outreach Campaign. Data was analyzed from the Code for America [getctc.org](https://getctc.org) portal, Campaign for Working

Families, the Latino Equitable Development Collective, Philly Counts, Public Results, Hustle and Aloysius, Butler, & Clark (A, B & C) marketing firm.

- **Step 8:** Code interview, survey, and administrative data, as well as data compiled in organization reports, for key themes.
- **Step 9:** Extract findings to compose recommendations for future child tax credit outreach.

## Logic Model

Articulated for the purpose of this evaluation and informed by CEO Director of Policy, Beth McConnell, the following **mission statement** was created to guide the development of a **logic model**:

*To engage in a variety of outreach and assistance activities that connect low-income, non-filing Philadelphia families with the Expanded Child Tax Credit.*

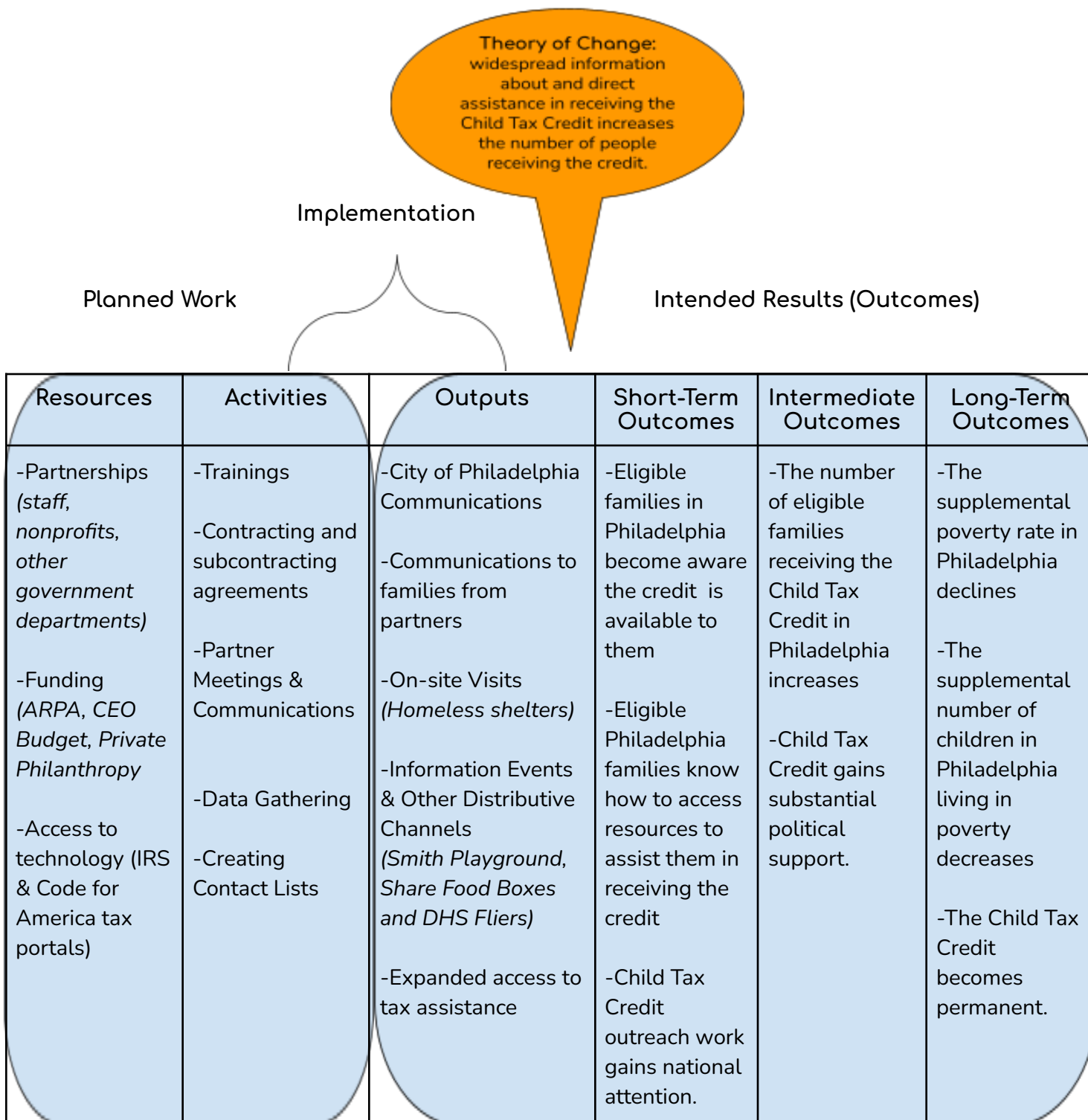
Next, the **theory of change** underlying the Outreach Campaign was identified and used to develop a working logic model. This logic model assisted in retroactively defining the outcomes of the Outreach Campaign, what outputs lead to those outcomes and what resources CEO had available to implement those outputs. The logic model development was an interactive process, created and then revised with feedback from CEO Director of Policy, Beth McConnell.

From this process, three **long-term objectives** emerged for the Expanded Child Tax Credit Outreach Campaign:

- 1) The supplemental poverty rate in Philadelphia declines.
- 2) The supplemental number of children in Philadelphia living in poverty decreases.
- 3) The child tax credit becomes permanent.

Then, **intermediate and short term goals** were articulated that were advancing the Outreach Campaign towards accomplishing the long-term goals. As articulated in the Expanded Child Tax Credit Outreach Campaign timeline above, CEO partnered with many nonprofit, private and City government departments to provide the **outputs** that would lead the Campaign to achieving its goals. These outputs included the communication and marketing materials from CEO and partnering organizations, on-site visits, informational events and the financial support the Office provided to nonprofit partners to increase access to tax assistance. To support these outputs, training, contracting and subcontracting agreements, partner meetings, data gathering and eligible recipient contact lists needed to be created. Conducting these **activities** was feasible due to the **resources** available to CEO: the partnerships, funding and access to technology the Outreach Campaign required. For more detailed information, see below.

Figure 3. Expanded Child Tax Credit Outreach Campaign Logic Model



## Key Findings

**Sample & Methodology:** The planning and implementation of the Outreach Campaign was conducted by multiple organizations of varying size and capacity. As such, a mixed-methods qualitative approach was utilized to collect data from a range of methods and modalities. Organizations with a large staff or volunteer size received surveys, such as tax assistance partners and grassroots community organizations. Organizations who had fewer employees participated in either individual or group interviews depending on availability. Grassroots partners were given the opportunity to complete surveys or participate in a group interview.

Following the development of the mission statement and logic model, a CEO informed survey was administered to 19 partners and recruited 20 individuals for in-depth, semi-structured interviews. Altogether, 2 individuals from two tax preparer organizations – Campaign for Working Families and Ceiba – and 10 individuals from the 17 grassroots organizations completed the survey and 20 individuals from BenePhilly Benefits Access, Impact Services BenePhilly, Philly Counts, CEO, Mayor’s Office, and other grassroots partners participated in an interview. In addition, CEO also compiled and reviewed planning documents and organization reports from 7 partners supporting outreach efforts. These partners include the Code for America getctc.org portal, Campaign for Working Families, the Latino Equitable Development Collective, Philly Counts, Public Results, Hustle and Aloysius, Butler, & Clark (A, B & C) marketing firm.

The following section includes key findings from all three components of this evaluation - data from surveys, interviews, and partner organization reports. Data is grouped and compiled by the codes used to evaluate the Expanded Child Tax Credit Outreach Campaign. A deductive coding method was used to identify key dimensions of evaluation for implementation and impact questions—fidelity, quantity, adaptability, preparedness, accessibility and quality—and then organized into positive and neutral feedback. An inductive coding method was used to pull out key themes for context questions. Additionally, two open-ended questions gauging Campaign strengths and improvements were added to interviews and surveys. For these two questions, an inductive coding method was used to pull out key themes from surveys and interview data. This data often spoke to the existing codes and were grouped as such. However, two new codes did emerge from this coding, “Community of Proximity Utilization” and “Professional Development”. Finally, findings from the partner organization reports were mapped onto the qualitative data.

### Context

These findings speak to the environment in which the Expanded Child Tax Credit Outreach Campaign was operating within and how the following complicated its delivery.

#### External Factors

**Finding #1:** The COVID-19 pandemic, varied and silo-ed processes across City agencies, insufficient outreach infrastructure, limited tax awareness, pandemic funding cuts to

partner agencies and vague branding of the expanded child tax credit limited the efficacy of the Expanded Child Tax Credit. These external factors served as barriers to the Outreach Campaign's success.

#### Neutral

- Several partnering organizations identified the specific population of Philadelphians that would benefit from the CTC as being persons who had limited experience filing for taxes. Thus, these residents need active, in-person assistance and communication. However, CEO and partner organizations conducted limited in-person outreach activities due to the risk of COVID-19 transmission.
- Some interviewees noted there were many City of Philadelphia offices and departments working to end poverty. These multiple offices have different processes to access City resources that could assist residents in overcoming the barriers they faced while trying to enroll for the expanded child tax credit. Thus, interviewees reported this was time-consuming for parents and guardians.
- Multiple interviewees reported the Office of Community Empowerment and Opportunity needed to create infrastructure and processes to support the Expanded Child Tax Credit as this type of work has historically been outside the scope of CEO. Creating these systems from the ground up took time.
- General tax ambiguity hindered the success of the Expanded CTC Outreach Campaign. Some interviewees identified filing taxes as already being a complicated and confusing process. Furthermore, the expanded CTC was eligible for people who may have had limited experience filing for taxes.
- Several interview respondents identified the funding decrease that tax assistance partners had observed due to COVID-19 in the previous year limited the amount of direct tax assistance appointments available to parents and guardians.
- Vague branding of the credit in the American Rescue Plan limited the success of the CTC Outreach Campaign. The child tax credit has been around for decades and without a very significant federal name change, multiple interviewees noted that parents did not realize the credit had changed at all and did not think they were eligible.

## Implementation

Below is a summary of the **Outreach Campaign Fidelity** data. These findings examine the extent in which the Expanded Child Tax Credit Outreach Campaign was delivered as planned.

### Fidelity

**Finding #2:** The planning of the Expanded Child Tax Credit Outreach Campaign was designed to be both reactive and proactive. Partners agreed the Campaign was both forward-thinking and responsive, and thus was delivered as planned.

#### Positive

- Some interviewees indicated the Expanded Child Tax Credit Outreach Campaign planning process contained both reactive and proactive planning.
  - Though initial planning was necessary to secure funding, interviewees

- identified details evolved over time.
- Some partnering organizations interviewees reported the Campaign was delivered as planned due to its flexible design.

Below is a summary of the **Outreach Campaign Quantity** data. The table presents a summary of the outreach efforts that comprised the Campaign.

Quantity
<p><b>Finding #3:</b> Although the Campaign was able to quickly scale contact efforts and adapt to unforeseen obstacles, participating organizations had distinct roles and responsibilities that confused eligible filers and partner organizations alike.</p> <p><b>Finding #4:</b> Campaign partners were able to launch almost 405,000 text messages, over 35,000 phone calls, over 14,000 seconds of radio ads, over 14,300 fliers and palm cards, and interacted with residents through 14,000 website clicks, over 5,000 digital advertisement clicks and 4 information events across 7 touchpoints in an effort to reach as many Philadelphians as possible.*<sup>8,9,10,11,12,13,14</sup></p> <p><b>Finding #5:</b> The Expanded Child Tax Credit Outreach Campaign engaged 40 organizations across the private, nonprofit, government and philanthropic sectors.*</p>
<p><b>Positive</b></p> <ul style="list-style-type: none"> <li>• Several interviewees reported the number of organizations involved in the Campaign grew as the Campaign shifted and adapted to unforeseen obstacles with timelines, contracting and organizational capacity.</li> </ul> <p><b>Neutral</b></p> <ul style="list-style-type: none"> <li>• Multiple interviewees indicated their clients felt confused by the number of times they were contacted by different organizations about the expanded child tax credit. <ul style="list-style-type: none"> <li>◦ 27 of the organizations involved in the Outreach Campaign were communicating directly with families.</li> </ul> </li> <li>• Each organization had distinct roles and responsibilities as part of the Campaign. This led to some interviewees reporting their clients felt confused when contacted by an organization that could not answer all of their questions or help them file for the credit. Thus, forwarding parents and their questions onto a different partner organization added another step in the process of enrolling for the expanded child tax credit that took time and energy.</li> <li>• Some partner organization interviewees reported confusion over the allocation of</li> </ul>

<sup>8</sup> McConnell, Beth. *Child Tax Credit Debrief*, Office of Community Empowerment and Opportunity, 27 June, 2022.

<sup>9</sup> Hicks, JaZahn. *Philly Counts CTC Phone Bank Report*, Philly Counts, Fall 2021.

<sup>10</sup> McConnell, Beth. *Child Tax Credit Debrief*, Office of Community Empowerment and Opportunity, 27 June, 2022.

<sup>11</sup> Ibid.

<sup>12</sup> Aloysius, Butler & Clark. *Office of Community Empowerment and Opportunity: EITC & CTC Campaign Marketing Communications Report*, Aloysius, Butler & Clark, Spring 2022.

<sup>13</sup> Ibid.

<sup>14</sup> McConnell, Beth. *Child Tax Credit Debrief*, Office of Community Empowerment and Opportunity, 27 June, 2022.

responsibility. Staff reported it was difficult to keep track of which organizations were delivering what services and activities as part of the Campaign.				
Outputs	Partnering Organization	Timeline	Estimated Quantity	Unit
Text Messages	Public Results & Hustle	September 2021 - June 2022	404,937	Messages
Phone Calls	Philly Counts & Campaign for Working Families	August 2021 - October 2021	35,095	Calls
Radio Ads	A,B, & C Marketing Firm	April 2022	14,400	Seconds
Printed Distributed Materials	A,B, & C Marketing, Free Libraries of Philadelphia System & City of Philadelphia Parks and Recreation Department	March 2022 - April 2022	14,300***	Fliers and palm cards
Website Interactions (claimyourmoneyphl.com)	A,B, & C Marketing	January 2022 - April 2022	14,000	Website clicks
Digital Advertisements <ul style="list-style-type: none"> <li>● Google Ads**</li> <li>● Facebook</li> <li>● Instagram</li> <li>● Division-D</li> </ul>	A,B, & C Marketing	March 2022 - April 2022	5,146	Advertisement clicks
Events <ul style="list-style-type: none"> <li>● Informational</li> <li>● On-Site Visits</li> </ul>	Columbia University, ShareFood, BenePhilly Benefits Access Unit & DHS	July 2021 - December 2021	4	Events

*Notes:*

- "Partnering Organization" refers to the organization that partook in creating each output.
- "Timeline" references the dates in which these particular activities occurred.
- "Estimated Quantity" is the estimated quantity of outputs generated by the Campaign across all the organizations who participated in that particular output activity.
- "Unit" refers to the measurement utilized to track the outputs. Please see Appendix A for more detailed information
- \*For more information on the types of communication utilized by the Campaign and the partner organizations involved in the Campaign, see Appendix C.
- \*\*Please note that due to a Google Analytics tracking issue, Google Ads engagement data is unavailable for March 21 through April 13th, 2022.

- \*\*\*This is a conservative estimation as there was no formal system for tracking fliers picked up by residents when visiting the Free Library of Philadelphia System and Parks and Recreation.

Below is a summary of the **Outreach Campaign Adaptability** data. These findings examine the extent in which the Expanded Child Tax Credit Outreach Campaign overcame unexpected barriers and how agile the Campaign was in responding to new information.

Adaptability
<p><b>Finding #6:</b> The combination of forward and responsive planning allowed the Campaign to both anticipate and adapt to obstacles, leading to the successful return of millions of dollars to Philadelphians.</p> <p><b>Finding #7:</b> Though the Campaign was able to adapt to obstacles, internal City of Philadelphia procedures, such as completing forms and the contracting process are time-intensive, limiting the Campaign's problem-solving agility. As the expanded provisions to the child tax credit were available for a temporary amount of time, limiting reaction time was important so that eligible filers could've been contacted and assisted sooner.</p>
<p><b>Positive</b></p> <ul style="list-style-type: none"> <li>• As mentioned above, multiple interviewees indicated the Expanded CTC Outreach Campaign was constantly evolving and successfully refunded millions of dollars to Philadelphians. Thus, the Campaign adapted quite successfully to obstacles they did not originally plan for.</li> </ul> <p><b>Neutral</b></p> <ul style="list-style-type: none"> <li>• Some interviewees indicated one of obstacles that the Campaign encountered was the amount of time required for contracting and to arrange requests for proposals (RFPs).</li> <li>• An interviewee indicated a barrier they'd encounter was having questions about the contracting and procurement process and having to wait multiple days for responses from other City departments.</li> </ul>

Below is a summary of the **Outreach Campaign Preparedness** data. These findings examine how prepared the Office of Community Empowerment and Opportunity was to launch the Expanded CTC Outreach Campaign.

Preparedness
<p><b>Finding #8:</b> CEO staff had the time, capital resources and funding needed to manage the Outreach Campaign workload without needing to scrap other responsibilities.</p> <p><b>Finding #9:</b> Grassroots partners had the information and materials necessary to implement their own outreach efforts.</p>



**Finding #10:** In the beginning of the Outreach Campaign, partner stakeholders who made contact with eligible filers lacked credibility as they did not have access to the names of children whose parents they were contacting.

#### Positive

- Multiple interviewees reported working more hours on the Campaign during the extended 2021 tax season though largely reported the workload was manageable.
  - No staff reported having to work overtime hours to complete Campaign responsibilities.
- Though some interviewees reported they needed to deprioritize other responsibilities to work on the Campaign, no tasks or project needed to be scrapped or could not be completed due to working on the Expanded Child Tax Credit Outreach Campaign.
- Several interviewees indicated they had an appropriate amount of funding and capital goods to conduct the Campaign.
- CEO provided grassroots organizations the materials necessary to launch outreach efforts amongst the communities they serve.
  - 80% of surveyed grassroots organization staff, 16 interviewees, indicated they "Strongly Agreed" that CEO had provided enough material.
- CEO was accessible for answering questions about the expanded child tax credit and therefore better prepared grassroots organizations to launch their own outreach efforts.
  - 95% of surveyed grassroots organization staff, 19 interviewees reported, CEO had been "Very Available" for answering questions. Interviewees identified the information sessions that the Office of Community Empowerment and Opportunity hosted as being particularly helpful.

#### Neutral

- A contacting organization interviewee reported they lacked the names of the children of the parents they were contacting when they first started making phone calls. Though they eventually received this information, interviewees reported feeling their credibility suffered with parents and guardians as a result.

Below is a summary of the **Outreach Campaign Accessibility** data. These findings examine the accessibility of the outreach information, activities and services that constituted the Campaign and the presence of diverse touchpoints to connect with all Philadelphians.

### Accessibility

**Finding #11:** Feasible funding requirements, culturally relevant outreach materials, and the variety of outreach communication channels the Campaign employed increased accessibility to the Campaign for a diverse audience of Philadelphia residents.

**Finding #12:** Philadelphia residents experienced barriers in accessing the expanded child tax credit. These barriers included fear over sharing information, accessing internet and language services, disputes with other caregivers and obtaining proper documentation, including hard copies of identification documents.

#### Positive

- The funding requirements were largely reported as "manageable" for grassroots organizations who launched CTC outreach efforts

- 19 grassroots nonprofits reported they “Agreed” or “Strongly Agreed” the funding requirements were feasible given the capacity of their organization.
- The resources provided by CEO were culturally relevant and were in the appropriate languages for the respective communities they served.
  - 100% of the interviewed grassroots organizations identified they either “Agreed” or “Strongly Agreed” that the resources CEO distributed to them matched the language and cultural needs of the individuals they worked with.
- Multiple interviewees reported viewing direct outreach efforts as more effective than marketing materials,
  - In spite of the COVID-19 pandemic, the greatest variety of communications utilized to spread awareness of the expanded child tax credit were either active and direct or passive and direct. Considering interviewees reported viewing direct outreach efforts as more effective than marketing materials, this is a strength of the Campaign.

#### Neutral

- Several interviewees reported parents and guardians expressed a lot of fear over sharing their information. Specifically, they felt fear that:
  - There would be repercussions from communicating their information to tax preparer partners.
  - They would be punished by the IRS for previous incidents.
  - The credit would render them ineligible for other government assistance, such as rent and income assistance.
- Many nonprofit partners expressed the parents and guardians they communicated with have experienced barriers receiving the expanded child tax credit. The most prevalent of these barriers were difficulty accessing language services, disputes with other caregivers and accessing the internet.
  - Language was a commonly reported barrier to accessing the Child Tax Credit. Language services were offered in Spanish and English but there were many people attempting to apply for the credit whose primary languages were not Spanish or English. For instance, partnering organizations identified working with Russian, Lithuanian and Cambodian and Arabic-speaking eligible Philadelphians. Even if documents or resources were in the primary language of the recipient, the documentation or resources needed to be written in a more simple, straightforward language.
- Clients expressed difficulties obtaining proper identification to receive the credit to multiple partner organization interviewees. Even if clients had the correct information written down, they could not receive the credit without hard copies of required documents.

Below is a summary of the **Outreach Campaign Quality** data. Quality was defined by the clarity in which information was distributed and the ability in which CEO and partners could answer questions.

## Quality

**Finding #13:** Communication between partner organizations involved in the Expanded Child Tax Credit Outreach Campaign was clear and simple to understand.

**Finding #14:** Partner organizations were limited in their ability to provide eligible filers information about complementary services.

**Finding #15:** In the beginning of the Outreach Campaign, partner organizations were unsure if clients would be required to give the credit back as the delay in receiving information from the Internal Revenue Service was substantial.

**Finding #16:** Eligible filers were confused by the Internal Revenue Service portal, who to contact after observing marketing materials, criteria necessary to claim a child, and whether they'd be required to give the credit back.

### Positive

- Multiple partner organizations indicated key contextual details about clients' situations were communicated regularly between contacting organizations and tax assistance partners.
- The information that grassroots partners survey respondents received from the Office of Community Empowerment and Opportunity about the expanded child tax credit was straightforward and clear.
  - 100% of grassroots organization staff, 20 interviewees, identified they "Agreed" or "Strongly Agreed" that CEO communication about the expanded child tax credit was simple to understand.

### Neutral

- Clients expressed to some partner organization interviewees that they did not find the IRS portal user-friendly.
- Several partners expressed an inability to transfer phone calls to tax preparer partners to answer questions that eligible families would have. Campaign for Working Families and Ceiba made callbacks but interviewees indicated a more streamlined process would have retained more clients.
- Many interviewees reported parents and guardians expressed confusion over criteria necessary to claim a child and who could receive the credit accordingly. Common situations wherein this confusion was witnessed were:
  - Divorced and separated parents.
  - Newborn children
  - 17 year old children
  - Emancipated children
  - Grandparents or other family members who provided childcare or had custody of the child.
  - Parents in the process of gaining legal custody over a child but hadn't completed the process yet.
  - Parents not realizing they both could not receive the credit.
- A partner organization interviewee indicated they were unsure in the beginning of the Campaign as to whether guardians would be required to give the money

back and therefore could not provide straightforward answers when guardians posed this question.

- Clients expressed to some interviewees that they'd observed the CEO Office expanded child tax credit marketing materials around Philadelphia but those materials lacked a phone number or email that parents could utilize to ask questions. Thus, it was unclear from the ad campaign who could help them get the credit.
- Some surveyed partnering organizations reported that when eligible families encountered barriers (such as internet access, transportation, etc.) while attempting to receive the expanded child tax credit, partnering organizations would try to refer them to partnering community or nonprofit organizations located near the guardians within Philadelphia. However, the Expanded CTC Outreach Campaign was limited by an inability to identify where such organizations were in the City, their contact information and how to direct families to them.
- Multiple interviewees identified there was a large delay in information about the expanded child tax credit from the Internal Revenue service.

Below is a summary of **Outreach Campaign Community of Proximity Utilization** findings. These findings arose from open-ended questions and examine the degree to which the Outreach Campaign utilized individuals and organizations from within neighborhoods and communities across Philadelphia.

### Community of Proximity Utilization

**Finding #17:** Engaging grassroots organizations lessened the fear eligible filers experienced around filing for the credit and the flexible nature of the funding grassroots organizations received allowed them to create outreach that was most effective for the specific communities they served.

**Finding #18:** Grassroots organizations expressed a desire to be engaged in the planning process as it would align outreach efforts between the City and grassroots agencies as well as allow grassroots organizations to coordinate with each other.

**Finding #19:** Partner stakeholders expressed direct, proximal outreach more effectively communicated information than marketing materials.

#### Positive

- Both partnering and grassroots organizations alike strongly reported engaging grassroots organizations as a strength of the campaign. Many interviewees indicated utilizing grassroots organizations was beneficial. Having familiar nonprofits talk to clients about the credit eased both of fear and confusion around the credit.
- In the open-ended feedback, several grassroots organizations identified the flexible nature of the funding as beneficial in creating outreach to meet the specific needs of the communities they serve.

#### Neutral

- Several grassroots stakeholders expressed a desire for the City to "collocate with

- grassroots agencies" in the planning of the Expanded CTC Outreach Campaign.
- Multiple interviewees reported viewing direct outreach efforts as more effective than marketing materials.
- Multiple grassroots partners indicated they could benefit from more opportunities to coordinate and network with each other, share best practices and ensure diversified outreach efforts.

Below is a summary of **Outreach Campaign Professional Development** data. These findings arose from open-ended questions and examine the amount of professional development that staff gained from working on the Campaign.

Professional Development
<p><b>Finding #20: Working on the Expanded Child Tax Credit Outreach Campaign provided learning opportunities for stakeholders.</b></p>
<p>Positive</p> <ul style="list-style-type: none"> <li>• Some interviewees indicated the collaborative relationship between the Mayor's Office and CEO Office was informative and provided CEO staff the ability to learn about communications strategy and outreach.</li> <li>• Some interviewees reported researching government assistance outreach to prepare them for launching the Expanded Child Tax Credit Outreach Campaign.</li> </ul>

## Impact

Below is a summary of the **Outreach Campaign Outcome** data. Below are some of the findings from partner organization reports, surveying tax assistance partners and some common themes pulled from interviews with various partner stakeholders.

These findings speak to the progress the Expanded Child Tax Credit Outreach Campaign has made towards its **short-term objectives**.

Short-Term Outcomes
<p><b>Finding #21: More eligible filers in Philadelphia became aware of the child tax credit and the temporary provisions that expanded it due to the Expanded Child Tax Credit Outreach Campaign.</b></p>
<ul style="list-style-type: none"> <li>• People seeking tax assistance from Ceiba identified they found out about the expanded child tax credit through the Ceiba website, referrals from friends and family and referrals from community organizations.</li> <li>• Many interview participants indicated that some of the eligible Philadelphians they worked with knew of the traditional child tax credit but did not know if or how the expanded child tax credit was different.</li> <li>• A staff member at Ceiba indicated the information people came to Ceiba having about the expanded child tax credit as being "somewhat accurate".</li> </ul>

These findings speak to the progress the Expanded Child Tax Credit Outreach Campaign has made towards its **intermediate-term objectives**.

Intermediate-Term Outcomes
<p><b>Finding #22:</b> The number of Philadelphians connected to the child tax credit increased due to the Expanded Child Tax Credit Outreach Campaign.</p> <ul style="list-style-type: none"> <li>• A surveyed staff member at Ceiba estimated that 40-60% of the people they assisted came to them specifically seeking assistance receiving the expanded CTC credit.</li> <li>• Staff members from both Ceiba and Campaign for Working Families observed an increase in people seeking tax assistance during the extended 2021 tax season (July - October). Both staff members reported October as being the busiest month for assisting people.</li> <li>• Staff members from both Ceiba and Campaign for Working Families observed an increase in people seeking tax assistance during the core 2022 tax season (January - April 2022). The survey respondent from Campaign for Working Families identified February as being the busiest month for assisting people and the survey respondent from Ceiba reported March.</li> <li>• A staff member at Campaign for Working Families estimated assisting an additional 250-500 people per week during the extended 2021 tax season and an additional 750-1,000 during the core 2022 tax season.</li> <li>• A staff member at Ceiba estimated assisting an additional 0-250 people per week during the extended 2021 tax season and an additional 0-250 people per week during the core 2022 tax season. <ul style="list-style-type: none"> <li>◦ Of these additional people, this staff member estimated that 25-50% were new clients.</li> </ul> </li> </ul>

These findings estimate the preliminary progress the Expanded Child Tax Credit Outreach Campaign has made towards its **long-term objectives**. This chart shows returns, refunds and gross federal refunds from all three tax filing options engaged in the Expanded Child Tax Credit Outreach Campaign.

Long-Term Outcomes			
<p><b>Finding #23:</b> A preliminary estimate of \$38.7 million was returned to low-income parents and guardians in Philadelphia.<sup>15,16,17</sup></p>			
Tax Filing Organization	Estimated Accepted Returns	Estimated Amount Returned (\$)	Timeline
Campaign for Working Families*	28,000	\$30,000,000 refunded	January through April 2022

<sup>15</sup> Campaign for Working Families. *Child Tax Credit Debrief*, Campaign for Working Families, Fall 2021.

<sup>16</sup> Latino Economic Development Collective. *Child Tax Credit Debrief*, Latino Economic Development Collective, Summer 2022.

<sup>17</sup> GetCTC.org. *Child Tax Credit Debrief*, Code for America, Fall 2021 - Spring 2022.

Latino Equitable Development Collective: <ul style="list-style-type: none"> <li>• Ceiba*</li> <li>• HACE*</li> <li>• Congreso*</li> <li>• Esperanza*</li> </ul>	1,290	\$2,678,374 gross federal refunds	Since July 2021
Code for America GetCTC.org*	1,520	\$6,091,200 refunded	September 2021 through May 2022
<i>Total</i>	<i>30,796</i>	<i>\$38,704,174</i>	<i>July 2021 through April 2022</i>

*Notes:*

- The estimated amount returned by GetCTC.org is due to the expanded child tax credit and unclaimed stimulus benefits.
- The amount estimated returned by Campaign for Working Families and the Latino Equitable Development Collective include all credits due to clients as refunds, including the child tax credit, earned income tax credit and other tax credits and benefits.
- The Campaign for Working Families and Latino Equitable Development Collective estimated amounts have accounted for tax amounts owed to the IRS by taxpayers. Please see Appendix A for more detailed tax return information for each filing organization.
- This is preliminary data as estimated returns and amount returned is still being configured by these tax filing organizations.
- Data from Campaign for Working Families includes data from both Pennsylvania and New Jersey Campaign for Working Families offices.

## Recommendations

- **Scale tax assistance partner call centers.** Interviewees indicated parents and guardians were confused when contacted by people who could not answer their tax-specific questions. In addition, marketing materials distributed about the expanded child tax credit lacked a phone number or email address in which interested parents could call and ask questions. Considering 65.44% of the appointments, 365 appointments, made at Campaign for Working Families by the end of October were generated from calls received, as opposed to calls *made*, this indicates the necessity of an assistance line.<sup>18</sup> Additionally, by the end of Campaign for Working Families' extended 2021 tax season, only 15%--17% of the individuals referred to them from Philly Counts resulted in appointments made. This could be due to a number of reasons—individuals did not need to make appointments and sought to file for the credit independently, parents were unavailable for future calls, or perhaps guardians realized they were not eligible for the credit after all. For those guardians whose engagement dropped off in between their contact with Philly Counts and their contact with Campaign for Working Families, streamlining the phone contact process to just one organization that is able to answer tax questions, could result in a higher level of engagement. Finally, 19.9% of the nearly

<sup>18</sup> Campaign for Working Families. *Child Tax Credit Debrief*, Campaign for Working Families, Fall 2021.

4,000 returns filed with getctc.org were not accepted in the fall of 2021 due to issues with verification or address. These could be corrected and the file could be resubmitted, yet only 8.34% of the initially rejected returns were accepted upon resubmission.<sup>19</sup> A large-scale call center could assist parents and guardians in the resubmission process. For future child tax credit outreach, scaling up call centers at Campaign for Working Families and Ceiba could make outreach more efficient, mitigate confusion and increase the amount of appointments made to file for the child tax credit. For more detailed information about appointments made at Campaign for Working Families and returns filed through the Code For America portal, see Appendix A.

- **Promote the ways in which the child tax credit has changed.** In many of the CEO marketing materials, the child tax credit was described as a “new” program rather than modified. Thus, if the child tax credit is ever expanded again, advertising that the child tax credit has changed and the ways it has changed may mitigate confusion. Parents may have seen the marketing but disengaged with the Outreach Campaign due to historically not qualifying for the traditional tax credit. Thus, running advertisements—at least preliminarily—announcing the credit has changed could increase the number of parents who file.
- **Create and market a flowchart for determining whether a caretaker is eligible to claim the child tax credit.** Of the nearly 4,000 returns submitted on the getctc.org website, 1,528 returns were rejected because the filer had already submitted a 2020 return or they or their child were claimed as a dependent on someone else’s return (see Appendix A for more information).<sup>20</sup> This finding is supported by the interview data from partnering organizations as clients reported confusion over situations of separated or divorced parents, primary caretaking provided by caretakers other than legal guardians, emancipated and newborn children. Clarifying the criteria required to claim a child for the child tax credit through situational flowcharts and posting these to the Office of Community Empowerment and Opportunity, Campaign for Working Families, Latino Equitable Development Collective and grassroots organization websites can assist guardians in determining their eligibility. If caretakers have additional questions, this flowchart could lead to the Community Legal Services website.
- **Internally market an outreach campaign partner organization chart and resource list.** Partner organizations indicated uncertainty in regards to which organizations were involved in the Expanded Child Tax Credit Outreach Campaign and what components each organization was responsible for. Utilizing an organization flow chart (such as the one provided earlier in this report) can assist in organizing future campaigns, communication between organizations and identifying gaps in campaign services. Additionally, organizations in charge of directly communicating with parents and guardians indicated they were unsure of where to direct individuals to get resources to overcome barriers preventing them from filing for the credit. For instance, if an individual communicated they did not have access to a computer or cell phone to file for the credit, staff members needed to research the nonprofits or libraries near the individuals home to connect them with this resource. Anticipating the barriers someone may face while trying to file for the credit and then having a readily available resource list of

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<sup>19</sup> GetCTC.org. *Child Tax Credit Debrief*, Code for America, Fall 2021 - Spring 2022.

<sup>20</sup> Ibid.



nonprofits per neighborhood that supply solutions to those barriers can assist staff members performing direct outreach.

- **Continue to focus efforts on text communication.** Tracking text message communication to returns filed on the Code for America [getctc.org/philly](https://getctc.org/philly) website shows a spike in filed returns near the middle of November that correlates with the texting outreach conducted by CEO using the texting platform Hustle, Inc (see Appendix A for more information).<sup>21,22</sup> Tracking interactions with the A,B & C website [claimyourmoneyphl.com](https://claimyourmoneyphl.com), the most clicked on links that sent people to the website came from those sent out in SMS text messages. As helpful as both websites—[getctc.org](https://getctc.org) and [claimyourmoneyphl.com](https://claimyourmoneyphl.com)—are, it may be more straightforward to direct guardians to only the [getctc.org](https://getctc.org) website to direct guardians straight to a platform they could use to file for the tax. In addition, the phone number of the Code for America calling center could be added to these text messages. This would connect parents and guardians who need more direct assistance filing for the credit or those who have more detailed, specific tax questions, to a tax assistance organization.
- **Engage grassroots organizations sooner in the outreach and planning process.** As much as text communication appears to have been impactful, there may be some Philadelphians who qualify for the child tax credit who are not already connected to government assistance. Therefore, CEO may not have access to their contact information. Thus, engaging grassroots organizations in the outreach process is very beneficial for accessing this group of people. Engaging grassroots organizations as early as possible in outreach efforts will increase the likelihood that the Outreach Campaign will reach Philadelphia guardians who've previously been unconnected with the credit. Indeed, grassroots partners expressed they'd be able to align their marketing efforts and prevent duplicating outreach efforts if they were more connected with each other and more involved in the Campaign planning process. Additionally, as noted in the findings, multiple partner organization interviewees highlighted the involvement of grassroots organizations as a strength of the Campaign. Interviewees reported that involving grassroots organizations utilized trusted voices that are closer in proximity to the eligible filers CEO seeks to connect with.

## Conclusion

Expanding the child tax credit created an opportunity for thousands of Philadelphia parents and guardians to receive financial support in the midst of the COVID-19 pandemic. By launching the Expanded Child Tax Credit Outreach Campaign, the City of Philadelphia Office of Community Empowerment and Opportunity attempted to spread awareness of the expanded child tax credit and connect as many residents to it as possible. Ultimately, CEO engaged over 44 private, philanthropic, nonprofit and government organizations. Together, these organizations contacted residents, spread marketing materials, assisted residents in filing their taxes and much more. Through these endeavors, these partners preliminarily ensured an estimated \$38,704,174 was returned to

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<sup>21</sup> Ibid.

<sup>22</sup> Aloysius, Butler & Clark. *Office of Community Empowerment and Opportunity: EITC & CTC Campaign Marketing Communications Report*, Aloysius, Butler & Clark, Spring 2022.

residents in the Philadelphia and surrounding metropolitan areas from July 2021 to April 2022.<sup>23</sup> This estimated \$38.7 million is likely a conservative estimate as well, considering it does not account for residents who may have filed through other methods, such as H&R Block, TurboTax, etc. As impressive as this feat is, the impacts of the Outreach Campaign extend far beyond April 2022. As mentioned above, the Campaign connected with new clients—people who had never connected with government assistance before. Now that CEO has connected with them, CEO can continue to spread information about other tax credits and benefits these Philadelphians might be eligible to receive.

The Expanded Child Tax Credit Outreach Campaign was the first CTC outreach campaign the Office of Community Empowerment and Opportunity has launched. Thus, it is important to document, consolidate and reflect upon the work performed as a part of this endeavor. As impactful as the Outreach Campaign was, contemplating on lessons learned from this first outreach effort will ensure that subsequent campaigns are even more successful. Using the findings generated from this evaluation and the subsequent recommendations, the Office of Community Empowerment and Opportunity and its stakeholder partners will continue to advance the financial security of low-income families across the city.

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<sup>23</sup> McConnell, Beth. *Child Tax Credit Debrief*, Office of Community Empowerment and Opportunity, 27 June, 2022.

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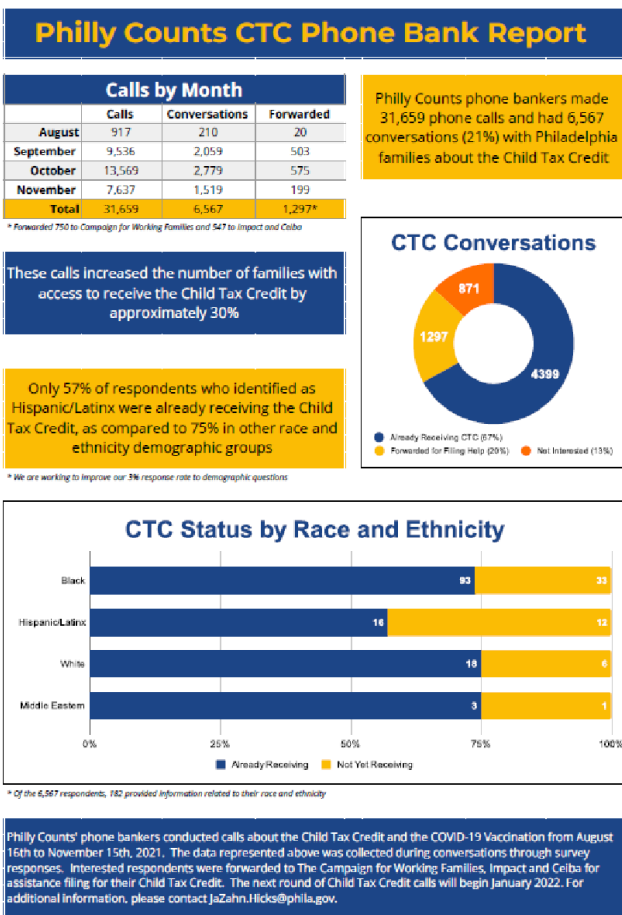
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## Appendix A: Partner Organization Reports

I. This data is compiled by Philly Counts for the phone calls they made for fall 2021.<sup>24</sup>



<sup>24</sup> Hicks, JaZahn. *Philly Counts CTC Phone Bank Report*, Philly Counts, Fall 2021.

II. This data is compiled by Campaign for Working Families for the phone calls they made for fall 2021.<sup>25</sup>

WARM CALLS - Lists provided by PhillyCounts and Public Results				
Trends	Total	Percentage		
# of taxpayers referred	1149			
Calls made	1517	132%		
# of ppl spoken	573	50%		
Already receiving CTC	150	13%		
Appts made	177	15%		
# of voicemails left	329	29%		
Resolved	1118	97%		
COLD CALLS - List provided by PhillyCounts			Summary	
Trends	Total	Percentage	# of taxpayers engaged	2,758
# of taxpayers	1000		# of taxpayers already receiving CTC	301 11%
Calls made	1310	131%	# of appointments made	544 20%
Already receiving CTC	137	14%		
Appts made	11	1%		
Resolved	998	100%		
CALLS RECIEVED in response to PC cold calls, PR texts, the City's mailing as well as our general outreach efforts				
Trends	Total	Percentage		
Call answered/returned	609			
Already receiving CTC	14	2%		
Appts made	356	58%		
Resolved	597	98%		

III. This data is compiled for by the Office of Community Empowerment and Opportunity for the spring and fall texting conducted by CEO through Hustle, Inc. and Public Results.<sup>26</sup>

DATE	# OF TEXTS	AUDIENCE	YES TO CALL	NO TO CALL	OPT OUT
9/26/21	37,518	CITY CARES	2.8% (1062)	5% (1872)	.6%
9/28/21	1,401	CITY CARES – wave 1 follow up to yeses	10.1% (142)	3.35% (47)	.57%
9/28/21	30,144	CITY CARES	1.3% (396)	.1% (43)	.58%

DATE	# OF TEXTS	AUDIENCE	ENGAGEMENT RATE	INBOUND MESSAGES/CALLS	OPT-OUT RATE
11/10/21	32,430	CITY CARES (HUSTLE)	1.6%	580	1.1%

<sup>25</sup> Campaign for Working Families. *Child Tax Credit Debrief*, Campaign for Working Families, Fall 2021.

<sup>26</sup> McConnell, Beth. *Child Tax Credit Debrief*, Office of Community Empowerment and Opportunity, 27 June, 2022.

DATE	# OF TEXTS	AUDIENCE	CLICK THRU RATE	OPT OUT RATE
4/5/22 sub list	101,584	EITC only (income \$12,500-\$20k)	1.9% (1919_)	.24%
4/5/22 sub list	93,606	CTC only (income \$0 - \$12,500 w kid)	3.81% (3,564)	.30%
5/18/22	152,301	PUB RESULTS – CTC only	1.87% (2,855)	.31%
6/14/22	28,702	CITY CARES	5.76%	.20%

IV. This is data compiled by A,B, & C Marketing Firm on their website interactions.<sup>27</sup>



<sup>27</sup> Aloysius, Butler & Clark. *Office of Community Empowerment and Opportunity: EITC & CTC Campaign Marketing Communications Report*, Aloysius, Butler & Clark, Spring 2022.

- V. This is data compiled by A,B & C Marketing Firm on their digital outreach campaign.<sup>28</sup>

March–April 2022	Performance Metrics						Engagement Metrics				
	Impressions	Clicks	CTR	CTR Benchmark	Spend	CPC	Sessions	Pages/Session	Avg. Session Duration	% New Sessions	Bounce Rate
Google Ads	37,436	2,608	6.97%	2.91%	\$6,755.59	\$2.59	974	1.0	00:30	84%	25%
Facebook	429,334	1,981	0.46%	0.56%	\$5,139.92	\$2.59	1,686	1.1	00:23	86%	69%
Instagram	30,185	133	0.44%		\$638.03	\$4.80					
SMS Outreach	195,190	5,483	2.81%	1%-3%	\$16,000.00	\$2.92	Sessions included with direct traffic.				
Division-D	961,896	424	0.04%	-	\$19,981.90	\$47.13	710	1.2	00:18	91%	80%
<b>TOTAL</b>	<b>1,654,041</b>	<b>10,629</b>	<b>0.64%</b>	<b>-</b>	<b>\$48,515.44</b>	<b>\$4.56</b>	<b>3,370</b>	<b>1.1</b>	<b>00:24</b>	<b>87%</b>	<b>58%</b>

Note: Due to a Google Analytics tracking issue, Google Ads site engagement data is unavailable for March 21–April 13

- VI. This data is taken from the Code for America getctc.org/philly tax filing portal for fall 2021. This includes taxes filed from all Philadelphia zipcodes.<sup>29</sup>

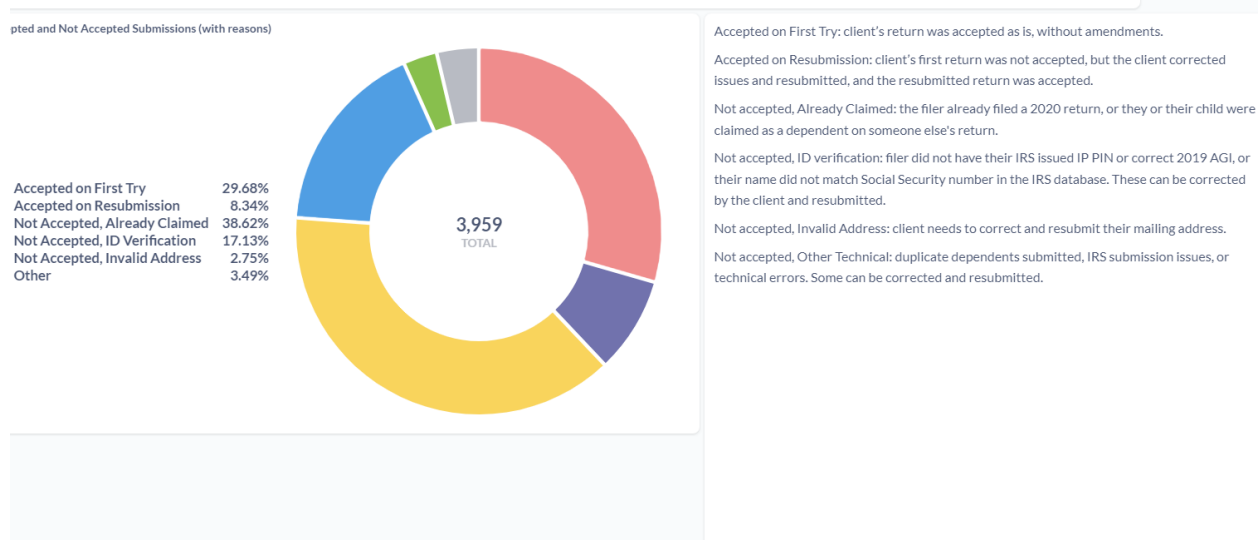


<sup>28</sup> Aloysius, Butler & Clark. *Office of Community Empowerment and Opportunity: EITC & CTC Campaign Marketing Communications Report*, Aloysius, Butler & Clark, Spring 2022.

<sup>29</sup> GetCTC.org. *Child Tax Credit Debrief*, Code for America, Fall 2021 - Spring 2022.



VII. This data is taken from the Code for America getctc.org/philly tax filing portal for fall 2021. This includes taxes filed from all Philadelphia zipcodes.<sup>30</sup>



<sup>30</sup> Ibid.

## Appendix B: Background (Continued)

### Child Tax Credits

The Taxpayer Relief Act of 1997 established federal child tax credits and forgave a portion of federal income taxes for eligible recipients. Child tax credits are provided to children with valid social security numbers in the United States. Foster care parents are eligible to receive child tax credits if they've had a foster child for six months or more. When first enacted, the credit reduced what parents owed on their federal income tax by \$400 per child under the age of 17 yet was later increased to \$500 in 1998.<sup>31</sup> In 2001, the credit amount was increased again and made refundable.<sup>32</sup> Therefore, if families received the credit and the amount was greater than the tax they owed, they received a refund for the difference around tax season. Because the child tax credit is a form of tax relief, families must have earned income to qualify for the credit, thus people without earned income were not eligible to receive any assistance. The federal child tax credit increased again in 2012 to \$1,000 through a provision of the American Taxpayer Relief Act of 2012 to align with the Earned Income Tax Credit. Finally, in 2017 the child tax credit was doubled to \$2,000 and limited the refundable component to \$1,400 with the Tax Cuts and Jobs Act of 2017. This child tax credit remained for these amounts until March 2021 when the American Rescue Plan temporarily increased the amount of the credit, the frequency of its distribution and reduced how much income parents needed to make to qualify for the credit, referred to throughout this report as the “expanded child tax credit”. As the expanded child tax provisions only applied to the 2020-2021 tax season, the child tax credit will return to the amount, frequency and qualifying income levels stipulated in the Tax Cuts and Jobs Act of 2017. These provisions—\$2,000 and a limited refundable amount—are also temporary, and are set to expire December 31st, 2025.<sup>33</sup>

### The American Rescue Plan Act of 2021

Acknowledging the financial burden of the COVID-19 pandemic, President Biden signed the American Rescue Plan Act (ARPA) in March 2021. Provisions within the Act temporarily provided economic relief for many U.S. citizens. As part of the relief package, single people making less than \$75,000, heads of households making less than \$112,500 and married couples making less than \$150,000 received stimulus payments. Individuals with dependents, including seniors and college students received \$1,400 per person.<sup>34</sup> ARPA extended unemployment benefits and provided tax relief for portions of these benefits. The Act provided emergency relief grants, loans and investments to small businesses and created the Small Business Opportunity Fund. This fund provided economic support for minority-owned businesses and those in low-resourced areas.<sup>35</sup> ARPA lowered or eliminated health insurance premiums for low-income and middle income families to decrease the

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<sup>31</sup> *Child Tax Credit Overview*, 11 July, 2022, National Conference of State Legislatures, [https://www.ncsl.org/research/human-services/child-tax-credit-overview.aspx#:~:text=It%20was%20established%20as%20a,per%20child%20under%20age%](https://www.ncsl.org/research/human-services/child-tax-credit-overview.aspx#:~:text=It%20was%20established%20as%20a,per%20child%20under%20age%20).

<sup>32</sup> *Ibid.*

<sup>33</sup> *Ibid.*

<sup>34</sup> *American Rescue Plan*, Accessed 13 March, 2022, The White House, <https://www.whitehouse.gov/american-rescue-plan/>

<sup>35</sup> *Ibid.*

number of U.S. citizens without medical insurance.<sup>36</sup> Finally, as part of the American Rescue Plan, the Biden Administration extended government assistance in the form of tax credits. The Earned Income Tax Credit (EITC) was increased from \$543 to \$1,052 for one individual without children and the Child and Dependent Care Tax Credit increased to \$4,000 for one individual and \$8,000 for two or more.<sup>37</sup>

In July 2021, the Internal Revenue Service created a portal to assist individuals with receiving the monthly sums of the expanded child tax credit. For the 2021 tax year, utilizing this portal counts as filing for individuals making less than \$12,550 and married couples earning less than \$25,100 annually. Though useful, many individuals found the portal complicated to use and it provided no option for newborns. Because of the challenges with the IRS portal, Code for America—a nonpartisan, technology nonprofit—created another IRS-approved, simplified portal made available in August 2021. Filing using this portal meant filing a simplified tax return and if information was provided incorrectly, tax preparation professionals had to correct the information using an amended return. Amended returns are paper forms and the process for their completion is slow and often causes backlogs. Despite this risk, this tool was mobile friendly, and was offered in both English and Spanish. This portal was available until the non-filer deadline of November 15th, 2021. In addition to these online filing options, low income individuals could have filed through nonprofit tax assistance organizations. The IRS Volunteer Income Tax Assistance (VITA) program is a national initiative designed to help support free tax preparation services through community partnerships. Through this program, the IRS, philanthropic organizations, and state and local governments provide grants to nonprofit organizations to support the operation of their tax services.

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<sup>36</sup> Ibid.

<sup>37</sup> *American Rescue Plan*, Accessed 13 March, 2022, The White House, <https://www.whitehouse.gov/american-rescue-plan/>

## Appendix C: Timeline of Expanded Child Tax Credit Outreach Campaign Events (Continued)

In **April 2021** during a regular update meeting between Kenney Administration staff that work on benefits access, and Community Legal Services—an organization providing legal services to low-income Philadelphians seeking benefits—the American Rescue Plan was identified as having major implications for the city’s residents. Acknowledging the impact of the legislation, CEO and the Mayor’s Office began internal discussions about how they could better support efforts to maximize the number of Philadelphians that received the CTC through outreach and assistance. Mayor Kenney contacted Gene Sperling, Senior Advisor to President Biden about the initiative. In May 2021, Mayor Kenney proposed including funds for an expanded child tax credit outreach campaign in the FY22 budget that was approved in the end of June by City Council. Once budget approval was granted, the CEO began investing City General Fund dollars in helping extremely low-income Philadelphians claim the CTC payments for which they were newly eligible.

In **July 2021**, Community Legal Services began training CEO Office staff and other community organizations on the IRS portal. Through this training, participants could learn how to assist residents in filing through the portal, and understand the experience of parents attempting to use it. CEO staff familiarized themselves with the Code for America portal, though its simplicity rendered training on that tool unnecessary. The Mayor’s Office worked with the city’s data management office to compile a list of contact information for residents who had children enrolled in TANF-related Medicare, or who received some form of assistance from the Office of Homeless Services and also had children, that city staff and partners could utilize for texting, calling and mailing information about the expanded child tax credit. When CEO received the information, they launched a partnership with Philly Counts. The City of Philadelphia Philly Counts Office was originally created for assistance administering the 2020 Census but evolved to play an important role in Philadelphia’s COVID-19 vaccine community engagement efforts during the pandemic. Philly Counts began partnering information about the child tax credit with their COVID-19 vaccine information. Together, CEO staff and Philly Counts created a telephone script and began making the first batch of phone calls in late August.

Due to the sheer number of phone calls that were required to connect with eligible residents, CEO staff quickly realized the length of the calls needed to be condensed. A system was required to connect people with detailed questions or who needed follow up information with further assistance. CEO staff adapted by expanding their existing partnership with Campaign for Working Families, a nonprofit organization providing free tax preparation, resource building and asset development in the Philadelphia area. Earlier in the year, CEO had increased funding for Campaign for Working Families to expand their tax prep services. In July, CEO added additional resources to create a calling center. Philly Counts continued to conduct outbound screening but could now refer residents to Campaign for Working Families for more information or assistance. To ensure residents were put in contact with Campaign for Working Families, Philly Counts recorded the contact information of people who needed to be followed up with and provided the list to Campaign for Working Families. In addition to partnering with Campaign for Working Families, CEO partnered with Ceiba, a nonprofit organization that provides tax services to Philadelphia’s latino community, to provide follow up tax assistance as well.

To reach more people, in **August 2021** CEO used their contract with Campaign for Working Families to subcontract with Public Results. Public Results, a for profit text recruitment firm, began sending text messages to eligible residents in **September 2021**. Each eligible resident received three text messages regarding the expanded child tax credit and those residents that responded were directed to Campaign for Working Families. During this time, CEO partnered with the City of Philadelphia Department of Human Services to distribute informational postcards on the child tax credit to foster care parents through foster care agencies. Additionally in September, CEO partnered with the Pennsylvania Budget and Policy Center to market information about the child tax credit for an outreach event at Smith Memorial Playground in East Fairmount Park. The Pennsylvania Budget and Policy Center is a nonpartisan, policy research project that provides independent analysis on state tax, budget and related policy matters and CEO has partnered with them on past projects.

In late September of 2021, the White House began coordinating regular meetings between municipalities offering similar expanded child tax credit outreach campaigns. Cities such as Philadelphia, St. Louis, New York City, and others met to report on their outreach efforts and strategize with staff from the White House, the Treasury department, and others.

Acknowledging that some eligible residents are less likely to have access to technology, the Mayor's Policy Office took the lead in sending mail about the expanded child tax credit information to residents in October of 2021. Some residents received postcards and others received letters, both directed residents to the Code for America portal.

In **mid-October 2021**, Campaign for Working Families closed down their operation to prepare for the 2022 tax season and the Public Results contract temporarily ended after the third round of texting. Philly Counts was available to continue conducting phone calls but required an organization to refer residents to for direct assistance. Ceiba continued to provide assistance but lacked the capacity to process all of the follow up appointments alone. CEO staff adapted by partnering with Impact Services BenePhilly team, a service funded by CEO through its BenePhilly program that assists residents in signing up for government benefits at several centers housed at community partner groups. Impact's BenePhilly team began offering support by helping eligible families navigate the Code for America tax portal.

The text messages, phone calls and mail spread information about the expanded child tax credit quickly throughout Philadelphia. Yet CEO decided the outreach campaign could be even more effective through engaging with eligible residents through community interaction. Though CEO had engaged in multiple efforts to increase access to the expanded child tax credit, their efforts focused on the list of Philadelphians on the social service list described above, thus depended on residents having a phone or a mailing address. In October and November of 2021, the BenePhilly Benefits Access Unit—an extension of CEO—made trips to Philadelphia family shelters to connect with the city's most vulnerable residents. During these trips, staff assisted eligible families with the Code for America portal and directed residents with further questions to Ceiba.

Philadelphia nonprofits are often more connected to neighborhoods than City offices. Considering the personal nature of government assistance and tax information, nonprofit organizations hold trusted positions within communities that eligible residents might feel more comfortable working with. Thus, CEO partnered with the Thomas Scattergood

Behavioral Health Foundation to provide \$192,000 to grassroots organizations willing to assist with the Expanded Child Tax Credit Outreach Campaign. City General Funds were used to fund the grant program, and Scattergood provided the additional staff capacity and expertise in helping to administer the grant program. Applications for the grant funding opened October 1st and were available through the beginning of November.

In early **November 2021**, CEO utilized a texting app company, Hustle, to provide a fourth round of text messaging and continued to direct people to the Code for America portal. As the portal would shut down with the non-filer process deadline of November 15th, it was vital to make one last push to connect residents to the expanded child tax credit. Hustle is a subscription-based texting platform, thus CEO and Mayor's Office staff sent 32,430 residents using the social services contact list. During this time, Share Food—a Philadelphia social services program that assists people in accessing free food—partnered with CEO to hand out informational fliers about the expanded child tax credit in the food boxes they distribute to residents. Finally, in early November CEO distributed tens of thousands of fact sheets in nine different languages through the Free Library of Philadelphia system and the Philadelphia Parks and Recreation department.

In July, CEO began the process of contracting a marketing firm as part of the Outreach Campaign. This is an involved process that requires issuing a referral for proposal (RFP), selecting a firm and drawing up a contract. Thus in **December 2021**, CEO negotiated the details of a contract with Aloysius, Butler and Clark Marketing (A, B & C) to create a marketing campaign for the expanded child tax credit.

In **January 2022**, CEO and the Scattergood Foundation announced the 17 grassroots organizations that would be funded to launch expanded child tax credit outreach at the community level. To make this decision, CEO convened a grantmaking committee of community organization leaders and City of Philadelphia staff with expertise in outreach and engagement to review proposals and make funding decisions. CEO received proposals totaling \$860,000, thus had to make a difficult selection process as they only had \$192,000 to distribute to grassroots organizations. These organizations consisted of Philadelphia Chinatown Development Corporation, Norris Square Community Alliance, Esperanza, Maternity Care Coalition, Ceiba, Coalition of African and Caribbean Communities (AFRICOM), ACHIEVEability, Women in Dialogue, Institute for the Development of African American Youth, Impact Services, Hunting Park Neighborhood Advisory Committee/Community Revitalization Corp, AMEC, African Family Health Organization, Why Not Prosper, Supportive Older Women's Network (SOWN), IHM Center for Literacy and Families Forward Philadelphia. Lastly, an A, B & C created website, [claimyourmoneyphl.com](http://claimyourmoneyphl.com), went live in January 2022.

In **February 2022**, the CEO Office hosted the Founding Director of the Children's Hospital of Philadelphia Medical Financial Partnership, Dr. George Dalembert; the Director of Policy at the Center on Poverty and Social Policy at Columbia University, Dr. Megan Curran; and the City of Philadelphia Deputy Executive Director of Family Supports and Basic Needs, Nikia Owens, for a virtual policy roundtable discussion on the expanded child tax credit and its impact. This conversation garnered national attention and continued to promote information about the credit and its financial impact on low-income families. On February 8th, 2022, the CEO Office participated in the Child Tax Credit and Earned Income Tax Credit Day of Action, a White House sponsored event spreading awareness of the outreach actions U.S. cities were taking to connect their residents with the two tax credits.

Throughout **March 2022**, CEO continued to support the grassroots organizations they'd partnered with by hosting information sessions and providing outreach materials. Throughout spring and summer of 2022, the grassroots community partners have continued to host events, spread information and communicate with their constituents about the child tax credit. One such event was an AFRICOM hosted Immigrant Tax Awareness Week beginning March 14th. CEO supported—and continues to support—these grassroots organizations by circulating information about their events and providing information about the child tax credit. Finally, A, B & C created ads for social media, public transportation and newspapers that were launched in March of 2022.

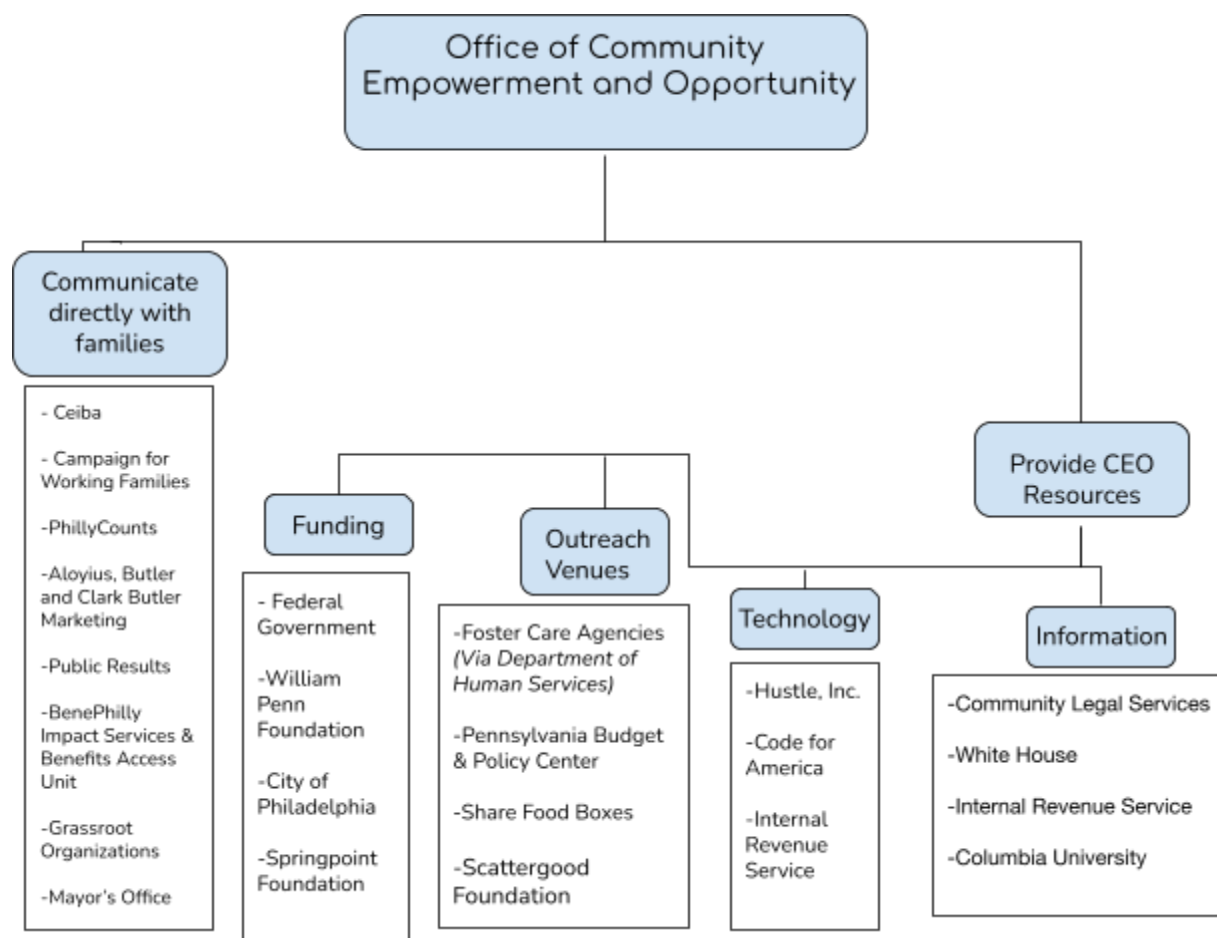
In **April 2022**, CEO and A, B, & C marketing contracted Public Results again to launch more text messages, directing parents and guardians to the [claimyourmoneyph.com](http://claimyourmoneyph.com) website. This spring texting was sent to a purchased list rather than the social service recipient contact list that had been used for prior rounds of texting. A, B, & C also generated radio ads that ran on four different programs for four weeks in April.

In **May 2022**, CEO and A, B, & C marketing continued partnering with Public Results to text parents and guardians about the child tax credit, this time utilizing the social service recipients contact list once more. This outreach attempted to spread the message that families were still able to file their taxes and receive refunds even after the April 18th deadline. Additionally, a new Code for America filing tool was launched to continue to support parents and guardians with filing for the child tax credit online. This new portal was approved by the IRS after the agency posted new rules and regulations for filing portals. On May 13th, CEO hosted their grassroots partners for an online training on using the filing tool so that they could further support their clients.

In **June 2022**, CEO and A, B, & C marketing continued partnering with Public Results to text parents and guardians about the child tax credit. Finally, in **July 2022**, more than a year after conversations around the expanded child tax credit began, the Outreach Campaign commenced. CEO is taking the month of July to evaluate and reflect upon the efforts of the past year and strategize for future outreach.

## Appendix D: Organizational Planning Tools

### I. Partnership flowcharts, organized by roles and responsibilities.



#### Notes:

- Organizations identified as "communicating" with families are those who interact with residents through in-person conversations, phone calls, marketing, texting, etc.
- Philanthropic and government organizations provided the Office of Community Empowerment and Opportunity resources through funding.
- "Outreach Venues" refers to organizations who utilized their existing events, systems and relationships to spread awareness of the expanded child tax credit though did not communicate with eligible parents.
- Nonprofits and government agencies listed under "Technology" are those that assisted the Office of Community Empowerment and Opportunity with tax filing portals and the infrastructure for text messages.
- "Information" organizations provided the Office of Community Empowerment and Opportunity with information needed to develop and implement the Expanded Child Tax Credit Outreach Campaign.

### II. Types of Expanded Child Tax Credit Outreach Campaign communication.



The communication map below was created to visualize the variety of ways in which expanded child tax credit awareness was spread throughout Philadelphia as a part of the Campaign. Communication was rated as either direct or indirect depending on whether the communication was provided to an identified audience. The communication was rated as either active or passive depending on the level of engagement and dialogue the communication created with the audience.

