



Save for College Engagement Playbook

A toolkit set for community-based organizations to engage families
and their communities in the Save for College Program

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NYC Kids RISE & Save for College Program Overview

NYC Kids RISE is a nonprofit organization working to expand economic opportunity and equity by providing families, schools, and communities with a way to work together to save for their children's education. Building on the dreams and expectations that families have for their children's futures, NYC Kids RISE aims to make attending and graduating from college and career training more achievable for all NYC public school students—regardless of where they come from or how much their families have in the bank.

NYC Kids RISE manages the Save for College Program in partnership with the NYC Department of Education and the City of New York.

The Save for College Program provides families, schools, and communities with a way to work together to save for their children's futures. It's a scholarship and savings program designed to make college and career training more accessible and achievable for all NYC public school students—regardless of their family's income or immigration status. The Save for College Program is a tool that families, along with their schools and neighbors, can use and customize in the way that best fits into their lives and best supports their dreams for their children. The program has two key goals:

- Every student who enters NYC public schools in kindergarten graduates from high school with a financial asset to be used toward college or career training;
- Students, families, schools, and communities have increased expectations of college and career training attendance and graduation for every child.

To best achieve these goals, NYC Kids RISE is working with families, neighbors, schools, faith leaders, community-based organizations, businesses, and public and private sector partners to build a universal, community-driven wealth-building platform—embedded in homes, schools, and neighborhoods across New York City.

These toolkits are one outcome of a year-long project that engaged Emerald Isle Immigration Center, Make the Road NY, Jacob Riis Neighborhood Settlement, Queens Community House, Sunnyside Community Services, and Urban Upbound as a part of a learning community of community based organizations across Community School District 30. The goals of the learning community were to: 1) Embed the Save for College Program into partner organizations' operations to increase individual outcomes for participating families while catalyzing community support for college and career training; 2) Support partner organizations to leverage the Save for College Program to advance their own goals; and 3) Advance NYC Kids RISE's ability to partner with and support similar organizations in the future. The project and the toolkits were made possible by the collaboration and support of Citi Community Development.

How the Save for College Program Works

As a community-driven, networked model, the Save for College Program provides many ways for families, schools, and communities to work together to build assets and support expectations for each participating child's future. This approach can be broken down into three main components:

Scholarship: The foundation of the platform is an automatic NYC Scholarship Account made available to every kindergartner, regardless of income or immigration status.

- Every student enrolled in a participating NYC public (district or charter) elementary school, starting in kindergarten, automatically receives an NYC Scholarship Account invested in a 529 plan with a \$100 initial deposit from NYC Kids RISE. (NOTE: NYC Kids RISE owns this account on behalf of the child, and families can activate this account with just the child's DOE Student ID number (OSIS Number), birth date, and zip code. They do not have to provide a social security number, credit card number, or other identifying or financial information to receive and activate this account.)
- Families can earn up to \$200 more in rewards from NYC Kids RISE for early engagement and saving.
- Participating schools provide financial education for students starting in kindergarten, using the accounts as part of their lessons.

Savings: With a scholarship account already in place, participating families can save in the ways and amounts that make sense for their budget.

- Families can open a 529 college savings plan account or bank savings account to start saving their own funds in the amount that makes sense for them.
- Families can participate in workshops, one-on-one support, and connections to financial counseling to create their own plan to save for college in line with their overall financial health.

Neighborhood Wealth-building: Schools, local organizations and businesses, government, financial institutions, and philanthropy work together to increase the funds in students' scholarship accounts and demonstrate that together they are supporting children's success.

- Local organizations, businesses, neighbors, and the entire City can leverage local assets to contribute directly to groups of students' NYC Scholarship Accounts through "Community Scholarships."
- Schools, CBOs, employers, and other neighborhood institutions integrate the accounts into their services and leverage them to achieve shared goals, enhancing college-going culture and social capital.
- Parents and communities convene, learn from one another, and organize to advance educational and economic opportunity in their neighborhoods.

The NYC Kids RISE Save for College Program is a scholarship and savings program administered by NYC Kids RISE Inc., a nonprofit, in partnership with the NYC Department of Education and the City of New York. NYC Kids RISE is neither affiliated with, nor an authorized distributor of, New York's 529 College Savings Program and does not solicit investments or provide investment advice.

How Families Get Started: the Three Building Blocks

Every student at a participating school is automatically enrolled in the Save for College Program starting in kindergarten, unless their family chooses not to participate. After they are automatically enrolled, there are three simple steps for families to start participating in the Save for College Program. They are called 3 Building Blocks because they are the foundation of the partnership to save together for children’s educational future.



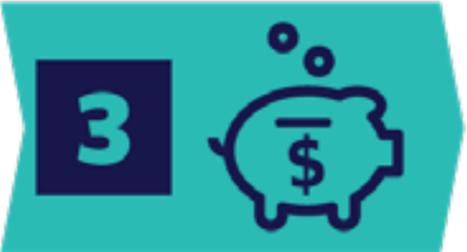
Building Block #1

The Building Block #1 is the first step for parents/guardians, where they register online to activate and view their child’s NYC Scholarship Account. At this point, NYC Kids RISE has already created an NYC Scholarship Account and deposited the first \$100 into it.



Building Block #2

After the first step, parents/guardians are encouraged to open their own college savings account and connect it to their child’s NYC Scholarship Account. They can choose to open and connect either a 529 plan account or a bank savings account. This enables families and their communities to save for their child’s future together.



Building Block #3

The third step is for parents/guardians to make the first deposit of \$5 or more into their connected college savings account.



The NYC Kids RISE Community Partnership Model

The Save for College Program is a community-driven wealth-building platform that is meant to support, reinforce, and become integrated within organizations like yours that make up the unique ecosystem of each neighborhood. Together, we embark on a mission to familiarize families with the Save for College Program; make it a community-wide tool that enables neighborhoods to work together; and collectively build assets

and reinforce expectations of success for every community's kids. This chart includes just some of the many partners that work together through the Save for College Program.



NYC Kids RISE
 NYC Kids RISE manages the Save for College Program in partnership with the NYC Department of Education and the City of New York. To reach as many families as possible, NYC Kids RISE collaborates with local stakeholders on the ground, providing accessible materials and trainings to local schools and community-based organizations so they can engage community members in the program.



Schools
 Schools are the center of neighborhoods and are the entry point for students and families into the Save for College Program. Schools educate new kindergarten families about the program when they enroll in school, facilitate the opt-out enrollment process, teach financial education lessons in the classroom starting in kindergarten, support families to activate their child's NYC Scholarship Account, leverage scholarship accounts as a tool to talk about college and career success, share information with families, and host and lead events and school community-wide campaigns.



City Agencies (including the NYC Department of Education, the NYC Department of Consumer and Worker Protection, and others)
 City agencies integrate the Save for College Program into their systems and touchpoints with families to share information, encourage families to take advantage of the program, tap into funding streams for Community Scholarships, and support their educational and economic opportunity objectives. This includes NYC DOE supporting their schools to integrate the program, NYC DCA integrating the program into their Financial Empowerment Center services, and more.



Community-based Organizations (CBOs)
 To meet families where they are, NYC Kids RISE works with local CBOs who can integrate the Save for College Program into their work, leverage their subject matter expertise and local knowledge, use and customize the program to achieve their goals, and become part of community-wide efforts to support assets and expectations for college and career training in their neighborhoods.



Local Businesses and Anchor Institutions
 Share information and spread the word about the program in their communities, tap into funding streams to contribute to students' NYC Scholarship Accounts through Community Scholarships, and be part of community-wide campaigns to support college-going expectations.

Civic Associations, Houses of Worship, Tenant Associations, and other Local Residents
 Share information and spread the word about the program in their communities, raise and contribute funds toward students' NYC Scholarship Accounts through Community Scholarships, and be part of community-wide campaigns to support college-going expectations.



Families
 Families are more likely to engage with the Save for College Program and begin thinking about and saving for college when their communities support conveying the importance of the program and save for college together. Participating families themselves play a crucial role in promoting the program goals amongst their peers.

Objectives

This user engagement playbook and the toolkits included in it focus on the following objectives:

- Help partner CBOs to integrate the NYC Kids RISE Save for College Program into their mission, workflows, and client engagements
- Educate families on the Save for College program, its benefits, and how to complete the program Building Blocks
- Help parents/guardians complete the three Building Blocks and continue saving for their children's college and career training
- Allow partner CBOs to contribute to a college- and career-going culture among participating families and in their neighborhoods, fostering community-wide support for every child's educational future

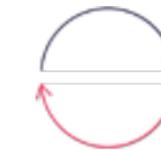
Principles

These are principles that inform this toolkit and how we encourage CBOs to use it.



Culturally Sensitive

The tools are sensitive to cultural norms represented throughout New York City



Continuity

This toolkit builds on the messaging, visual language, and tone of existing NYC Kids RISE Save for College Program resources



Simple

The toolkit is accessible to all New Yorkers and breaks down complexity visually and through simple language



Trustworthy

The tools build trust among those historically underserved by mainstream financial products



Engaging

The tools provide interactive, novel, visual, and fun ways to learn about the program

Engagement Toolkits

Select an engagement toolkit that meets your organization's goals and workflow and allows you to engage families in the Save for College Program

Toolkits Overview

Important note!

The 1:1 Family Orientation Toolkit is a foundation for the following toolkits which can be used separately according to each CBO's needs.

1:1 Family Orientation

Use this toolkit to introduce the program to families, answer key questions, and support them in the decision-making process.

Read-a-thon

Use this toolkit to plan and conduct a Read-a-thon that helps families collect donations from their support networks and community while encouraging children to read.

College Visit

Use this toolkit to plan and host a college visit that allows families to experience what going to college is like first-hand and get exposure to college culture.

Tax Time

Use this toolkit to integrate information on the program into your tax preparation services and help families split their refund to save for college and career training

1:1 Family Orientation

Description, Objectives and Use Cases

Description

The 1:1 Family Orientation Toolkit provides CBOs with the tools and resources to identify participating parents/guardians, introduce the Save for College Program to parents/guardians, answer questions, and move them to action by allowing parents/guardians to understand and complete the three Building Blocks and choose which steps to take. The toolkit helps CBOs to tailor the conversation to the families’ needs and questions by using educational materials developed by NYC Kids RISE.

Objectives

The 1:1 Family Orientation Toolkit allows CBOs to:

- Provide a personal, trustworthy, and customized setting to educate parents/guardians on the program and answer questions
- Provide families with support on completing Building Blocks #1 (Activating the NYC Scholarship Account), #2 (Opening and Connecting a Savings Account), and #3 (Making a first Deposit)

Use Cases

- The 1:1 Family Orientation Toolkit can be used by any organization to plan and conduct interactions with parents/guardians one-on-one or in group settings. Please make sure to choose the tools that make sense for the type of event you plan. Refer to the Toolkit Components section to the right to learn when to use which tools.
- Scenarios in which to use this toolkit include info sessions for parents/guardians at piggybacked events, tabling, introductory workshops at schools or community centers, conversations during office hours, and scheduled 1:1 appointments.

Toolkit Components

Downloadable versions of each of these tools can be found online at <https://nyckidsrise.org/resources-for-community-members/> 

	Tool	How to Use
Internal	Guide to Educational Materials 	Choose the right materials to use when interacting with families, based on where in the Save for College Program journey they are and the questions they have.
	Talking Points 	Customize conversations with parents/guardians to identify who is eligible, explain the Save for College Program, its benefits, answer key questions, and help parents/guardians complete the three Building Blocks.
Family-facing	Save for College Program Journey Planner 	Hand out to parents/guardians when first providing an introduction to the program to explain the steps of the Save for College Program journey, and to allow parents/guardians to keep track of where in the journey they are and plan next steps. Keep a copy of the filled out document for your organization to keep track of a participant’s progress.
	Choose the Right Account Tool 	Use the tool to walk parents/guardians through college savings account options, and give them information they can use to choose an account that makes sense for them. Alternatively, hand out and explain the tool to parents/guardians when referring them to another CBO to prepare them for the meeting to complete Building Block #2.

Engagement Journey

Preparation

Select the type of event you plan to implement and decide which tools to use

Implementation

Use the **Guide to Educational Materials** to identify which resources to hand out to participants



Use the **Save for Program Journey Planner** to help families understand all the steps of the program and provide a tool to plan next steps



Ask if parents/guardians have any outstanding questions or would like to schedule an appointment to complete further Building Blocks

Follow-up

Follow up with families to see if they need further support to use their accounts and how else they are engaging with the Save for College Program in their community. Schedule a follow-up appointment if a parent/guardian requires additional assistance

- Family-facing Tools
- Internal Tools



Use the **NYC Kids RISE Save for College Communications Guidelines*** to create tailored outreach materials and make sure parents/guardians know about the event. Use the resources on pages 6-14 to create your outreach materials and follow the approval protocol on pages 4-5 before sharing the materials with families

Use the **Talking Points** to plan and conduct conversations tailored to specific family needs



Use the **Choose the Right Account Tool** to support a family's decision on finding the right savings account



<https://nyckidsrise.org/resources-for-community-members/#communications-guidelines>

Read-a-thon

Description, Objectives and Use Cases

Description

This toolkit provides CBOs that work with participating children in the Save for College Program with the tools and resources to plan and host a Read-a-thon. The Read-a-thon is catered to K-5 students, and it includes support for families to complete Building Block #1 (Activating the NYC Scholarship Account), Building Block #2 (Opening and Connecting a Savings Account) as a first step to prepare families for the Read-a-thon. The Read-a-thon is a fun and educational way for your child to gather support from friends, family, and other champions in their community for their college and career training future.

Objectives

The Read-a-thon Toolkit allows CBOs to:

- Increase students' reading skills and literacy
- Provide opportunities for families to save for their child's college and career training with the help of family members, friends, and their wider community
- Provide families with support on completing Building Blocks #1 (Activating the NYC Scholarship Account), #2 (Opening and Connecting a Savings Account), and #3 (Making a first Deposit)

Use Cases

- The Read-a-thon Toolkit can be used by any organization working with students grades K-5 to conduct a Read-a-thon
- This toolkit is particularly suited for organizations providing after-school programs and/or those following a literacy mission
- Participating families must complete Building Block #1 (Activating the NYC Scholarship Account) and Building Block #2 (Opening and Connecting a Savings Account) before being able to collect contributions through the Read-a-thon

Toolkit Components

Downloadable versions of each of these tools can be found online at <https://nyckidsrise.org/resources-for-community-members/> 

	Tool	How to Use
Internal	Planning Checklist 	Use to plan your Read-a-thon event
	Scoreboard (Poster OR Individual Sheet) & Clock Worksheet 	Place poster or individual sheets in the classroom to keep track of students' progress towards their goals. Hand out Clock Worksheet to students to track their reading times outside of the classroom
Family-facing	Read-a-thon Q&A 	Customize document and hand out to parents/guardians before the Read-a-thon as a way to inform them about the event and provide answers to key questions.
	Champion Worksheet 	Hand out to parents/guardians during the Read-a-thon as a worksheet to brainstorm potential College and Career Champions who can support their child's reading efforts.
	Pledge Letter 	Hand out to parents/guardians to give or send to identified College and Career Champions to ask for donations and provide instructions on how to donate to a college savings account.

Engagement Journey

Preparation

Use **Planning Checklist** to prepare and plan event



Customize, print and distribute **Read-a-thon Q&A** to parents/guardians



Implementation

Pin up **Scoreboard Poster** OR **Individual Scoreboard Sheets** on the wall for students to keep track of their progress



Hand out **Pledge Letter** to parents/guardians to share with potential College and Career Champions



Participants receive donations

Follow-up

Follow-up with parents/guardians to check if they are progressing with donations and provide help with completing Building Block #3 or connecting them to financial counseling resources

Family-facing Tools
 Internal Tools



Use the **NYC Kids RISE Save for College Communications Guidelines*** to create tailored outreach materials and make sure parents/guardians know about the event. Use the resources on pages 6-14 to create your outreach material and follow the approval protocol on pages 4-5 before sharing the materials with families

Provide support to complete Building Block #1 and Building Block #2 for families that want to participate but have not yet completed these steps

Hand out **Clock Worksheet** to students to record their reading times outside the classroom



Hand out **Champion Worksheet** to parents/guardians to help identify possible College and Career Champions



(Optional) Host reading sessions or read-a-louds including parents/guardians to motivate participating students

(Optional): Host a 1:1 to help parents/guardians identify champions

(Optional) Host a closing event to celebrate students' successes

<https://nyckidsrise.org/resources-for-community-members/#communications-guidelines>

Additional Resources

Financial Education Reading List

This list is used by public elementary schools as part of the financial education curriculum.

Title	Author	Grade Appropriate Reading Level
Jamaica Finds	Juanita Havill	PreK-3
My Rows and Piles of Coins	Tololwa M. Mollel	PreK-3
Alexander Who Used to be Rich Last Sunday	Judith Viorst	2-4
Beatrice's Goat	Page McBrier	K-2
Oh, the Places You'll Go	Dr. Seuss	K-2
When I Grow Up	Al Yankovic	K-2
A Chair for My Mother	Vera B. Williams	1-3
Those Shoes	Maribeth Boelts	2-4
One Cent, Two Cents, Old Cent, New Cent: All About Money	Bonnie Worth	PreK-3
Clothesline Clues to Jobs People Do	Kathryn Heling	PreK-1
Lily Learns About Wants and Needs	Lisa Bullard	K-2

Additional Books by Grade

Use the below book suggestions by grade to compile a list of readings that work for your audience.

Title	Author	Grade Appropriate Reading Level	Theme
Ten Little Toes, Two Small Feet / Diez deditos de los pies, dos piecitos	Kristy Dempsey	PreK-K	Bilingualism
All Kinds of People	Shelley Rogtner	PreK-2	Diversity
Astronaut Annie	Suzanne Slade	K-2	Career/Family
Auntie Luce's Talking Paintings	Francie Latour	K-2	Identity
Bookjoy, Wordjoy	Pat Mora	K-2	Reading/Music
Counting on Katherine: How Katherine Johnson Saved Apollo 13	Helaine Becker	K-2	Career/Inspirational/Gender and Race
Dreamers	Yuyi Morales	K-2	Immigration
Hidden Figures: The True Story of Four Black Women and the Space Race	Margot Lee Shetterly	K-2	Career/Inspirational/ Gender and Race
Meet Yasmin!	Saadia Faruqi	K-2	Imagination/Family/Diversity
The Sun Is Kind of a Big Deal	Nick Seluk	K-2	Science
Along the Tapajós	Fernando Vilela	K-3	Culture
Ana Maria Reyes Does Not Live in a Castle	Hilda Eunice Burgos	3-5	Career
The Cardboard Kingdom	Chad Sell	3-5	Imagination/Diversity
Drawn Together	Minh Lê	3-5	Art/Family
Front Desk	Kelly Yang	3-5	Immigration/Diversity
The House That Lou Built	Mae Respicio	3-5	Family/Friendship
Julián Is a Mermaid	Jessica Love	3-5	Gender and Race
Me and Marvin Gardens	Amy Sarig King	3-5	Sustainability
Rocket to the Moon! Big Ideas That Changed the World #1	Don Brown	3-5	Career/Science
Stella Diaz Has Something to Say	Angela Dominguez	3-5	Diversity

College Visit

Description, Objectives and Use Cases

Description

Exposing Save for College Program participants to the look and feel of college at an early age can help participants and their families to start to identify as college and career bound. This toolkit helps organizations or other entities that work with participating children in the Save for College Program to orchestrate a college visit at a local school that engages both parents/guardians and children with the college experience. A college visit can be organized for a 4 year college, 2 year college, as well as for any institution providing career and/or vocational training.

Objectives

The College Visit Toolkit allows CBOs to:

- Help set participants' expectations about college by exposing children and their parents/guardians to college culture early on
- Educate families on college options, costs of attending college, available funding sources, and where the Save for College Program scholarship and savings accounts fit in
- Provide families with support on completing Building Blocks #1 (Activating the NYC Scholarship Account), #2 (Opening and Connecting a Savings Account), and #3 (Making a first Deposit)

Use Cases

- The College Visit Toolkit can be used by any organization working with students grades K-5 to organize a college visit
- This toolkit is particularly suited for organizations providing after-school programs and following an education and/or literacy mission

Toolkit Components

Downloadable versions of each of these tools can be found online at <https://nyckidsrise.org/resources-for-community-members/> 

	Tool	How to Use
Internal	Planning Checklist 	Use to plan your college visit
	Campus Map 	Use to plan your tour at the respective college and hand out to parents/guardians during the college visit for orientation.
Family-facing	Cost & Types of Colleges Handout AND Cheat Sheet 	Hand out to parents/guardians during the college visit, when discussing types of colleges, college costs, and funding sources. Use Handout Cheat Sheet for instructions on how to facilitate the conversation.
	Family Checklist 	Hand out to parents/guardians at the beginning of the college visit to provide guidance on relevant questions.
	Scavenger Hunt 	Hand out to children at the beginning of the college visit to playfully check off stations and interview a student about their college experience.

Engagement Journey

Preparation

Use **Planning Checklist** to prepare and plan the College Visit



Use the **NYC Kids RISE Save for College Communications Guidelines*** to create tailored promo materials and make sure parents/guardians know about the event. Use the resources on pages 6-14 to create your outreach material and follow the approval protocol on pages 4-5 before sharing the materials with families.

Week 1 | **Week 2** | **Week 3** | **Weeks 4 - 6**

Contact local college to obtain permission to host and schedule the college visit, request a campus map, and clarify questions

Recruit and collect RSVPs for the college visit and send a follow-up reminder before the event

<https://nyckidsrise.org/resources-for-community-members/#communications-guidelines>

Implementation

Handout **Campus Map** to participants at the beginning of the tour



Day of the Event (Week 7)

Hand out **Family Checklist** to parents/guardians at the beginning of the tour to provide guidance on relevant questions



Hand out **Scavenger Hunt** to children to make the visit more engaging and fun for them



(Optional): Organize a conversation with a college advisor during the visit to help answer families' questions

Convene with participating parents/guardians at a computer lab or WiFi enabled location with laptops/tablets to complete Building Block #1 and provide information on Building Block #2 and Building Block #3

Organize a photo shoot with college props to provide participating families with a memorable takeaway of the college visit

Find a space to facilitate a conversation and handout the **Costs & Types of Colleges Handout** to parents/guardians during the college visit to inform them on college types, costs of attending college, and funding sources. Use the corresponding **Handout Cheat Sheet** for instructions



Follow-up

Week 8

Follow up with participants to provide support on completing Building Block #2 and Building Block #3

Family-facing Tools
 Internal Tools

Additional Resources

Sample College Visit Itinerary

This is a sample itinerary for a local college visit. Use it as a starting point to customize a trip that resonates with your audience!

Activity:	Time:	Description:	Location:	Led By:
Getting There	12pm - 12:30pm	A shuttle will be organized to and from the college	Departure address	CBO & shuttle bus company
Meeting at the College	12:45pm	The group convenes at a central meeting point to start the visit	Main entrance of the college	CBO
Tour of the College	1pm - 2pm	The group tours the campus guided by college staff	Throughout the campus	College staff
Lunch	2pm - 3pm	The group eats lunch provided by the local college	Dining Hall	CBO
Scavenger Hunt	3pm - 4pm	Children are going on a scavenger hunt on campus	Throughout the campus	CBO
Mini Parent/Guardian Presentation & Building Block Completion	3pm - 4pm	Parents/guardians are given a mini-presentation on college types, costs, and funding sources, and are provided information and guidance on completing Building Block #1, #2, and #3	Computer lab or WiFi enabled meeting room	CBO
Group Photo	4pm - 4:10pm	The group is provided with college props (e.g. books, college hats, graduation gowns ..) for having a group photo taken	Outside of the main college building	CBO
Getting Back	4:15pm - 4:45pm	The group meets to be shuttled back to departure address	Main entrance of the college	CBO & shuttle bus company

Tax Time

Description, Objectives and Use Cases

Description

The Tax Time Toolkit helps organizations that are providing free tax preparation services with the tools to incorporate information on the Save for College Program and splitting tax refunds into their workflow. Tax time provides a key opportunity for families to save for their child’s college and career training and earn rewards through the Save for College Program by allocating part of their tax refund to their college savings account. It can be an especially important opportunity for lower-income families who qualify for significant tax credits like the EITC or Child Tax Credit.

Objectives

The Tax Time Toolkit allows CBOs to:

- Leverage tax time as a unique opportunity for families to save for their child’s college and career training
- Educate tax filers about the Save for College Program and opportunities to apply part of their refund to their child’s college savings account
- Provide families with support on completing Building Block #2 (Opening and Connecting a Savings Account) to allow them to split their tax refund to make a contribution to their child’s college savings account

Use Cases

- The Tax Time Toolkit can only be used by organizations providing tax preparation services
- Organizations can integrate splitting refunds and providing information on the Save for College into their tax preparation services

Toolkit Components

Downloadable versions of each of these tools can be found online at <https://nyckidsrise.org/resources-for-community-members/> 

	Tool	How to Us
Internal	Planning Checklist 	Plan how to include information on the Save for College Program and splitting refunds into your tax preparation services.
	Splitting the Refund Conversation Guide 	Use to identify eligible individuals and guide conversations with tax filers to gauge interest in and complete splitting their refund.
	Splitting the Refund Instructions 	Use to split a refund in TaxSlayer following step-by-step instructions.

Engagement Journey

Preparation

Use **Planning Checklist** to plan how to incorporate services into your organization's work flow



Provide information on the Save for College Program and splitting the refund options to existing financial counseling & tax preparation clients

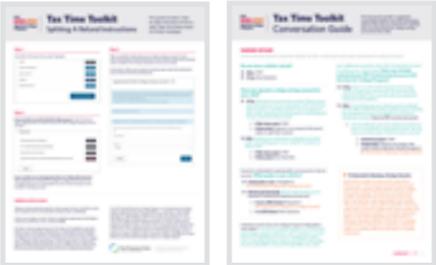
October - November

December

January

Integrate sample language on splitting tax refund services (see additional resources on page 46 of this playbook) into your existing outreach materials for promoting free tax preparation services

Train staff how to split a refund and facilitate a conversation with tax filers using the **Splitting the Refund Instructions** and the **Splitting the Refund Conversation Guide**



Implementation

Use the **Splitting the Refund Conversation Guide** to prepare and guide tax filers through the process



Use the **Splitting the Refund Instructions** for step-by-step instructions on how to split a refund on TaxSlayer



Day of the Event (End of January to Mid-April)

Provide opportunities for tax filers interested in splitting their refund to complete Building Block #2

(Optional): Connect first-time tax filers to financial counseling resources and provide support on creating a savings plan and completing Building Block #3

Follow-up

Week 5

(Optional): Follow-up with tax filers on financial counseling

- Family-facing Tools
- Internal Tools

Additional Resources

Sample Language to Promote Splitting Tax Refund Services

Use and customize the below language to integrate information on splitting tax refunds into your existing outreach materials for free tax preparation services.

- **Want to use part of your tax refund to save for your child's future college and career training?**
[insert CBO name] offers free tax preparation and helps you apply a portion of your refund to your child's college savings account. Book a free appointment, by calling *[insert CBO phone number]* or visiting *[insert CBO website URL]*.
- (Optional motivational message 1) You may be eligible to earn up to \$150 more in scholarship rewards for your child through the NYC Kids RISE Save for College Program.
- (Optional motivational message 2) Time is on your side. Starting to save for college and career training when your child is young can make a big difference.

NYC
KiDS RiSE™
Save for College
Program

Version 2.0 | February, 2021