

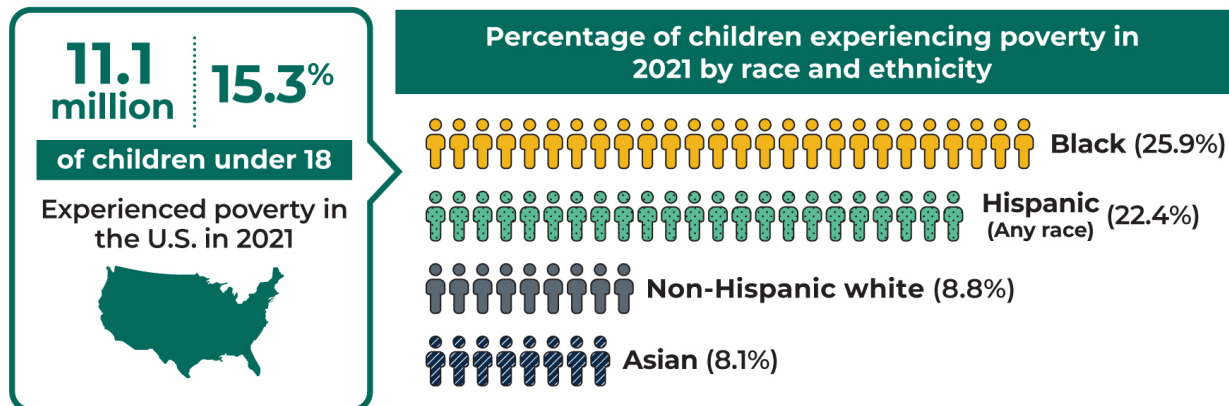
Income Supports Issue brief

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Strategies to Increase Equitable Access to Income Supports

Experiencing poverty in early life matters for children's development, health, and well-being ([National Scientific Council on the Developing Child 2020](#); [Mustard 2006](#)). Almost one in six children in the United States experiences poverty. Because of longstanding racial inequity in U.S. social, economic, and political systems, Black and Hispanic children are more likely than others to experience poverty (Exhibit 1).

Exhibit 1. Many U.S. children experience poverty and risk is unequal



Source: [Creamer et al. 2022](#).

Note: Poverty measure is the official poverty measure, calculated by the U.S. Census Bureau.

Programs that directly supplement family income aim to help families gain a more stable financial footing and exit poverty. Key federal income support programs include the Earned Income Tax Credit (EITC) and Temporary Assistance for Needy Families (TANF) (Exhibit 2). The EITC is a refundable federal tax credit available to people whose earned income is under a certain limit.¹ Those with dependent children get higher payments ([Crandall-Hollick et al. 2021](#)). TANF is a time-limited cash transfer program available to people who are pregnant or

have children and whose incomes are under a limit that varies by state.²

Research suggests income support programs such as TANF and EITC can matter for children's health and well-being ([Finkelstein et al. 2022](#)). For example, families who receive EITC are less likely to have low birth weight or preterm babies ([Hamad and Rehkopf 2015](#); [Hill and Gurley-Calvez 2019](#); [Hoynes et al. 2015](#)) and more likely to have children who are healthy and well ([Averett and Wang 2018](#)).

Exhibit 2. Overview of key federal income supports: EITC and TANF

Federal EITC	<ul style="list-style-type: none">• Paid annually• Amount varies by income and household structure• Average payment was about \$2,045 in tax year 2021• 30.1 million recipients (tax year 2021)• Families apply by filing taxes including filling out additional forms to claim the credit.
TANF	<ul style="list-style-type: none">• Paid monthly• Amount varies by income, household structure, and state• Maximum payment for family of three ranged from \$204 (Arkansas) to \$1,098 (New Hampshire) in 2021• 1.8 million recipients (federal fiscal year 2021)• Families apply through state, local, or Tribal TANF offices• Adults who get cash assistance through TANF are usually required to engage in work-related activities as a condition of receiving income support

Sources: [Crandall-Hollick et al. 2021](#); [English and Paulsell 2018](#); [Office of Family Assistance 2022](#); [Thompson et al. 2023](#); [IRS 2023b](#)

Note: Unemployment insurance (which provides time-limited weekly payments to eligible people who have lost their jobs) and COVID-19 stimulus payments (which were three direct payments to eligible people) were also featured in this brief, but most of the research this brief summarizes focused on the EITC and TANF.

EITC = Earned Income Tax Credit; TANF = Temporary Assistance for Needy Families.

Access to income supports varies by geography, immigration status, family structure, and race and ethnicity ([Finkelstein et al. 2022](#)). For example, although roughly 80 percent of eligible taxpayers receive the EITC ([IRS 2022](#)), households with incomes so low they do not need to file a tax return or those with non-citizen household members more commonly miss out ([Chen et al. 2021](#)). Only about 25 percent of eligible families have participated in TANF in recent years ([Falk 2023](#)) and this figure varies in important ways by race and geography. For example, states with a higher share of Black residents tend to offer very low TANF payments and have more restrictive program rules ([Hahn et al. 2017](#)).

In contrast, the federal stimulus payments in response to the COVID-19 pandemic were broadly

available, provided meaningful support, and were often automatically disbursed ([Chen 2021](#)). Research shows that these payments—along with expansions of the Child Tax Credit and other temporary programs implemented during the pandemic—contributed to historic reductions in child poverty across racial and ethnic groups ([Burns et al. 2022](#)). These robust supports were temporary, however; strategies are needed to increase equitable access to lasting income support.

This brief presents findings from research on equitable access to income supports by nine grantees of the Robert Wood Johnson Foundation (RWJF) Equity-Focused Policy Research grant program (Exhibit 3).

Exhibit 3. Equitable access and the Robert Wood Johnson Foundation Equity-Focused Policy Research grant program

Equitable access means all families—regardless of race, ethnicity, geography, or other factors—have equal access to supports to promote children’s well-being. Promoting equitable access involves addressing specific barriers faced by families who have the most difficulty accessing supports.

The **Robert Wood Johnson Foundation Equity-Focused Policy Research** grant program funded action-oriented research to build on strategies to increase equitable access to supports for families with young children. This brief focuses on grantee research on income support. Other grantees focused on nutrition supports and supports for early care and education.

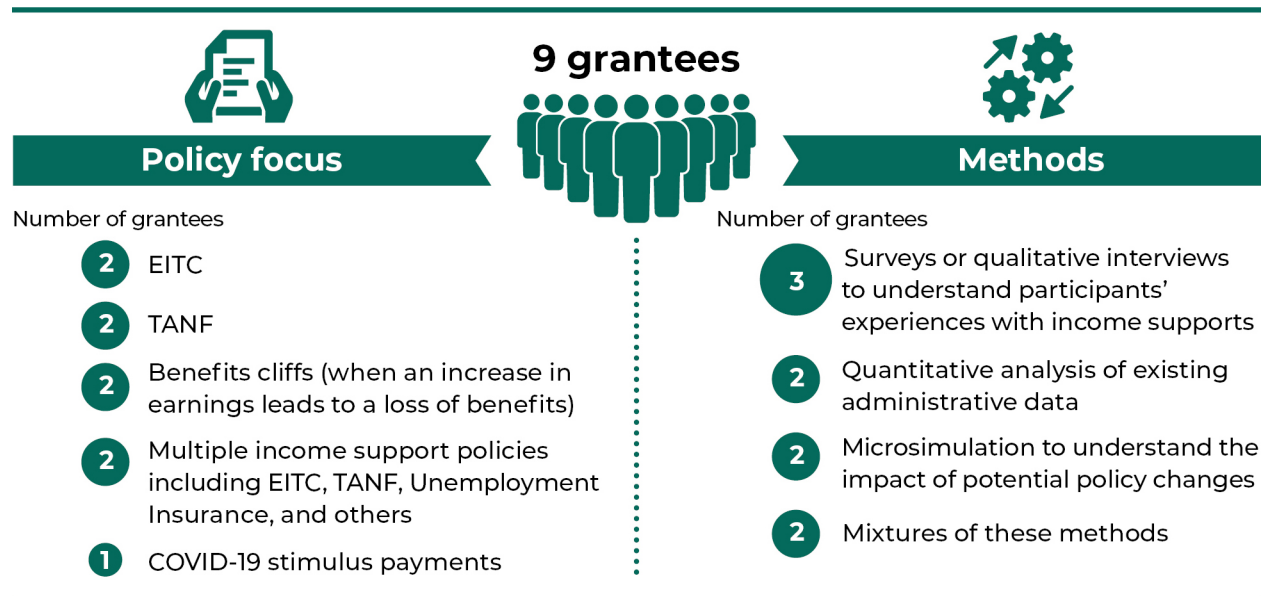
Studies incorporated principles articulated by the **Equitable Evaluation Initiative**. According to these principles, evaluations should advance equity; answer questions about the drivers of inequity, the effects of policies on different populations, and the role of cultural context; and be valid multiculturally and encourage participant ownership.

See Appendix Table 1 for a summary of the income supports projects presented in this brief. See <https://www.equitableeval.org/> for details on the Equitable Evaluation Initiative.

Using diverse methods, grantees examined barriers to access and promising strategies to increase access to a range of income supports (Exhibit 4). Their research was based in states across the United States

(California, Colorado, Illinois, Minnesota, North Carolina, New Jersey, New York, and Pennsylvania). Two grantees conducted research nationwide.

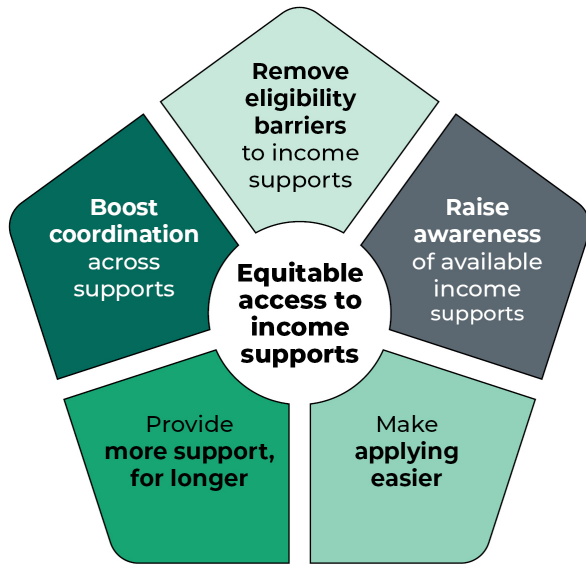
Exhibit 4. Policy focus and methods of the grantee research



EITC = Earned Income Tax Credit; TANF = Temporary Assistance for Needy Families.

This research by the grantees highlights changes to policy and practices that could help address inequalities in access to income supports (Exhibit 5) and improve families’ economic inclusion.

Exhibit 5. Changes suggested by findings



Recommendation 1: Remove eligibility barriers to income supports

Most income support programs in the United States restrict eligibility, especially for people who are not U.S. citizens. The grantees’ research suggests that expanding eligibility criteria could lead to more equitable access to income supports through the following strategies:

Reduce restrictions on eligibility for income supports for people who are not U.S. citizens.

Allowing noncitizens who immigrated legally to the United States to participate in the Supplemental Nutrition Assistance Program, Supplemental Security Income, and TANF would reduce child

poverty, with greater reductions among Asian and Pacific Islander and Hispanic children (Minton et al. 2021). Staff at nonprofit social service agencies reported citizenship status as the identity that most shaped families’ experiences applying for and accessing TANF (Holcomb et al. 2021). Reducing exclusions to COVID-19 stimulus payments based on citizenship might have helped reduce racial and ethnic disparities in take-up (Chen et al. 2021).

Expand unemployment insurance to better include those with irregular work and earnings.

State policies that expand eligibility for unemployment insurance to those with low or irregular earnings during the COVID-19 pandemic are associated with increased take-up overall and among Hispanic families (Thomson et al. 2021).

Broaden eligibility for EITC. Some states operate their own EITCs to supplement the federal EITC and may have different eligibility rules. In states that have their own EITC eligibility rules that are as broad as the federal rules, Hispanic families participate in the federal EITC at higher rates (Chen et al. 2020). In general, Hispanic families participate in the EITC at lower rates than White families (Thomson et al. 2022), so this finding suggests broadening eligibility for EITC programs is a promising strategy to reduce inequalities in access.

Strategies identified by grantee research: Remove eligibility barriers

- Reduce restrictions on eligibility for income supports for people who are not U.S. citizens.
- Expand unemployment insurance to better include those with irregular work and earnings.
- Broaden eligibility for Earned Income Tax Credit programs.

Recommendation 2: Raise awareness of available income supports

Some families who are eligible for income supports do not receive them because they are not aware of them, believe they are not eligible, or have misperceptions or fears about the consequence of receiving them. The grantees' research highlights the following strategies that could improve awareness to lead to more equitable access to income supports:

Focus outreach on eligible groups that participate in income support programs at disproportionately lower rates. The federal government conducted outreach to households that did not normally file tax returns to raise awareness of COVID-19 stimulus payments. This is one possible reason why there was more participation and fewer racial and ethnic disparities in participation between the first and subsequent rounds of stimulus payments ([Chen et al. 2021](#)).

Tailor outreach messages to address common misperceptions. Among families who were likely eligible for the EITC, common reasons for not applying are lack of awareness of the program among families and their social circles, belief that they are ineligible, not knowing that families with incomes below the tax filing threshold are eligible, and fear of repercussions such as having to pay back the income ([Anderson et al. 2022](#); [Efrid 2021](#); [Hamad et al. 2022](#)). Among parents likely eligible for TANF who had experienced previous involvement with the justice system, not feeling they were needy enough and lack of awareness of the program were common reasons for not applying for this support (Petitclerc et al. 2021). Outreach efforts that address common misperceptions about eligibility could help improve equitable access ([Chen et al. 2021](#)).

Conduct outreach and offer information in multiple languages. A lack of EITC information in languages other than English in rural areas might make it especially hard for families with limited English proficiency in these areas to access the EITC ([Jordan Institute for Families 2021](#)). In states that make EITC information available in Spanish,

Hispanic families were more likely to participate in the federal EITC ([Thomson et al. 2022](#)).

Strategies identified by grantee research: *Raise awareness*

- Focus outreach on eligible groups that participate at lower rates.
- Tailor outreach efforts to address common reasons for lack of awareness or misperceptions. Such efforts might include the following:
 - Campaigns using social media, personal networks, trusted advisors, and employers about the availability, basic provisions, and eligibility rules
 - Phone lines to provide information and answer families' questions
- Conduct outreach and offer information in multiple languages.

Recommendation 3: Make applying easier

Applying for income supports can be time consuming and confusing for families. The grantees' research highlights the following strategies that make it easier to apply and could improve equitable access to income supports:

Help people file taxes and claim the EITC. The use of no-cost tax preparation services through the Internal Revenue Service's Volunteer Income Tax Assistance program is linked to higher rates of federal and state EITC receipt compared with using tax preparation software or a certified public accountant (Hamad et al. 2021).

Provide focused supports to families facing specific challenges with filing taxes and claiming the EITC. Confusion about reporting income or dependents can be an added barrier to claiming the EITC for those in intergenerational households or for families in which multiple adults could claim a child as a dependent ([Ballentine et al. 2022b](#)). Families in rural areas face additional burdens when applying for the EITC, such as limited broadband

access; greater time and transportation barriers; and limited density of free or low-cost high-quality tax preparation services ([Jordan Institute for Families 2021](#)).

Make application and payment automatic.

Racial and ethnic disparities in receiving COVID-19 stimulus payments declined following the first round of payments, possibly resulting from improvements in automatic payments in the later rounds. Improvements included sending checks or debit cards via mail to those without direct deposit information on file ([Chen et al. 2021](#)).

Strategies identified by grantee research: Make applying easier

- Help people file taxes and claim the EITC. Such efforts might include expanding availability of no-cost or low-cost, high-quality tax preparation services.
- Provide focused supports to families facing specific challenges with filing taxes and claiming the EITC. Grantee research suggested such efforts might include the following:
 - Provide clearer guidance on reporting dependents
 - In rural areas, provide transportation or mobile tax-preparation services
- Make support payments automatic. For example, automatically pay income supports administered through the tax code to likely eligible households

Recommendation 4: Provide more support for longer

Even the highest benefit levels provided by income support programs in the United States may not be sufficient to support a family. In addition, some supports are temporary, such as TANF. The grantees' research suggests that providing more support for a longer period could improve equitable access to economic security:

Increase the level of income support. Studies with simulation models suggest that higher income supports may reduce inequities in risk of poverty. For example, a set of policy changes, including increasing income support benefit levels, ensuring all eligible families have access to key supports, and introducing new supports, would reduce overall child poverty and reduce racial and ethnic disparities in risk of poverty (Minton et al. 2021).³ Similarly, direct payments (such as stimulus payments) with a higher total budget and a lower income eligibility threshold could result in a higher share of dollars going to families with lower incomes ([Hawkins 2021](#)), reducing economic inequality.

Increase the duration of supports. A study of TANF applications in New Jersey in 2018 found prior TANF case closure because of sanctions or hitting the 60-month federal lifetime limit corresponded to a higher likelihood of TANF application denial. Because families of color tend to experience TANF sanctions at higher rates than White families, the findings suggest mechanisms that might drive inequalities in TANF access ([Hetling et al. 2021](#)).

Strategies identified by grantee research: Provide more support for longer

- Provide more support. Grantee research suggested such efforts might include the following:
 - Increase benefit levels across income support programs.
 - Change funding, policies, and practices so all or almost all eligible families can participate in income supports.
 - Structure direct payments and similar policies so more dollars go to families with higher need.
- Increase the duration of supports. For example, allow families to participate in TANF beyond the 60-month federal lifetime limit even if they have previously faced sanctions.

Recommendation 5: Boost coordination across income supports

Families might be eligible for multiple income support programs and other public programs that provide child care subsidies and health insurance. It can be burdensome to apply for and maintain access and hard for families to know how all these programs interact and how their eligibility for each might change as they find and lose jobs and income. The following strategy could address this confusion:

Simplify and coordinate the multiple income supports and other benefits available to families with low incomes. Better coordination across income supports and help understanding the benefits cliffs (that is, when an increase in earnings leads to a loss of benefits) could help promote access to supports and family financial security ([Anderson et al. 2022](#); [Ballentine et al. 2022a](#); [Holcomb et al. 2021](#)). To promote equitable access, efforts should focus on those families most affected by program complexity and benefits cliffs.

Strategies identified by grantee research: *Boost coordination across supports*

- Simplify and coordinate the multiple income supports and other benefits available to families with low incomes. Grantee research suggested such efforts might include the following:
 - Improve communication between nonprofit service providers and local public human services agencies.
 - Provide training, supports, or professional development for staff who administer income support programs.
 - Implement policy changes that minimize benefits cliffs.

Conclusions

Grantees' research generated important new findings on the structural factors that shape inequalities in families' access to income supports. It highlighted concrete changes to income support policy and practices that could help address these inequalities and move income support programs in the United States toward a model that more fully and equitably supports access.

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Endnotes

¹ The income threshold for EITC eligibility was \$57,414 for a single taxpayer with three or more children in 2021 ([IRS 2023a](#)).

² The across-state median income threshold for TANF eligibility for a family of three was \$10,176 in 2020. ([Urban Institute n.d.](#)).

³ The authors considered the following specific programs or program changes: increasing Supplemental Security Income benefits up to the amount of poverty guidance; changing policy so all or almost all eligible families participate in housing vouchers, the Low Income Home Energy Assistance Program, and TANF; creating a transitional jobs program paying the state's minimum wage open to all parents and guardians of children younger than 18; and no longer restricting noncitizens who immigrated legally to the United States from receiving the Supplemental Nutrition Assistance Program, Supplemental Security Income, or TANF (Minton et al. 2021).

Appendix Table 1. Summary of grantees' projects

Grantee	Policy focus	Summary of project based on dissemination products
Child Trends	Federal EITC; state EITC, unemployment insurance, COVID-19 stimulus payments	Examined the associations of household characteristics, state policy, state practices, and state characteristics with receipt of federal EITC, unemployment insurance, and COVID-19 stimulus payments, with a focus on Hispanic families.
Northwestern University	TANF	Conducted interviews to understand perceptions of TANF among parents of young children who had low incomes and previous involvement with the justice system in Illinois.
University of California, Berkeley	COVID-19 stimulus payments	Developed an interactive tool to simulate how different stimulus payment policies matter for the level and equitable distribution of payments to adults and families.
University of California, Berkeley School of Public Health	Federal EITC; state EITC	Administered surveys, conducted qualitative interviews, and reviewed tax forms to understand perceptions and use of the EITC among families with young children in California, factors that might contribute to disparities in access, and ways to reduce disparities in access
Rutgers University	TANF	Estimated associations of individual case characteristics—including race, ethnicity, and citizenship—and county-level characteristics with TANF denials among families who applied for TANF in New Jersey. Conducted interviews and surveys with staff and leaders at nonprofit human services agencies in New Jersey to understand their perceptions of safety net functioning and work to promote equitable access to TANF.
University of North Carolina	Federal EITC; state EITC	Estimated associations of county-level demographic, geographic, and economic factors with county-level EITC uptake among families in North Carolina, with a focus on identifying barriers to access among families living in rural areas and ways to address these barriers.
University of Pittsburgh	Benefits cliff	Conducted in-depth interviews with parents in Pittsburgh, Pennsylvania, who received the federal EITC and had experienced at least one recent wage increase to understand their perceptions of the benefits cliff.
Urban Institute (Hahn and colleagues)	Benefits cliff	Interviewed parents receiving TANF cash assistance in Colorado, Minnesota, and New York to understand their perceptions of the benefits cliff. Conducted microsimulation to show how taxes and benefits would change as families with low incomes earned more money.
Urban Institute (Minton and colleagues)	Multiple policy options	Conducted microsimulation to examine the effects of multiple policy options (for example, increasing Supplemental Security Income benefits and removing eligibility barriers to legal noncitizens) on child poverty, overall and by race and ethnicity.

Source: The information in this brief is based on our review and summary of findings presented in briefs, journal articles, blog posts, interactive tools, and infographics shared by grantees. We also reviewed presentations from academic and policy-focused conferences, public webinars, testimonies to lawmakers, and working group meetings of representatives involved in policymaking or administration (see reference list).

Note: This summary is based on dissemination products we received from nine of the 11 grantees.

EITC = Earned Income Tax Credit; TANF = Temporary Assistance for Needy Families.