OMB No. 3170-0024
Expiration Date: 12/31/2015

Questions for VITA Partners
To be answered at the end of tax season 2014

Instructions

Thank you for participating in the Consumer Financial Protection Bureau Ready? Set, Save! Tax-time savings pilot in 2014. The tax time savings pilot furthers our mandate to provide opportunities for consumers to access financial services during the preparation process to claim earned income tax credits and other benefits. We also recognize that your organization is committed to maximizing the benefit of the tax refund as part of your efforts to improve the financial literacy and capability of consumers so we greatly appreciate the opportunity to collaborate with you on this effort.

As we described in the memorandum of understanding entered into by your organization and the CFPB before the start of tax season, we are seeking a limited amount of information about the results you achieved during the recently ended tax campaign, and your feedback on the tools, materials and training provided by the CFPB. Your response is strictly voluntary but the information you provide would be extremely helpful to the Bureau in getting a better understanding about how organizations such as yours integrate savings promotions strategies in their VITA campaign and the value that the Bureau can provide in support of those efforts.

The information we receive from you will be analyzed along with similar responses from the 12 other Ready? Set, Save! pilot organizations to assess whether the tools and materials we provided to you were beneficial and to help us plan for future efforts in the tax time savings space. The CFPB plans to publish a report of the findings from this year's campaign but will only use your information along with other pilot sites in an aggregated form and will not report on the individual results or feedback from each organization.

A list of the information we are seeking is below; seven statistical elements that you can extract from the Taxwise software that you employed to help people file their taxes; and a two page narrative response in which we are requesting that you address 6 key questions regarding your experience in partnering with the CFPB on this pilot. We estimate that your response will take no more than 90 minutes to complete. We would appreciate your reply by May 5th, 2014. Please email your responses to Dave Sieminski at david.sieminski@cfpb.gov. If you have questions in advance of your response please contact Dave at the email address above or call him at 202-435-9698.

End of tax season numerical results

1. Number of tax returns prepared by your whole community VITA tax campaign.
2. Number of tax returns prepared at sites where Ready, Set Save (RSS) savings campaign was utilized. (if different than answer to question number 1).
3. Number of returns at RSS sites claiming the earned income tax credit (EITC).
4. Number of returns at RSS sites receiving a refund.
5. Number of returns at RSS sites using direct deposit to receive their refund.
6. Number of returns at RSS sites splitting their refund using IRS form 8888.

7. Number of returns at RSS sites purchasing a U.S. Series I savings bond.

End of tax season narrative report

Please provide a narrative description of your experience participating with the CFPB in the Ready, Set, Save tax time savings campaign. The total report length should be no more than two pages. Please include responses to the following general questions plus any other information you would like to provide.

1. Describe your impressions of the training that was offered to your volunteer trainers through webinar in early January 2014. Was the training useful and well-organized? Did it provide you with information you need to utilize the CFPB training and consumer facing materials? Provide recommendations for improving the training in future years.
2. Were you able to deliver the training to volunteers? If so how did you do it, in group sessions? One on one? Or other? Did you connect it to your regular tax prep training or deliver it separately? How long were you able to spend on delivering the RSS training?
3. Describe your impressions of the content contained in the Instructor's Guide and the Participant's Guides provided by the CFPB. Was the information well organized and was it useful for the intended audiences in helping to better execute a savings strategy in your tax campaign? Did you receive this information in a timely manner in order to utilize it in your 2014 tax campaign? If not, when would you have liked to receive it?
4. Describe your impressions of the consumer-facing materials provided by the CFPB including worksheet, information sheet, posters, stickers, pens, and videos. How did you employ them in engaging with your tax customers? What worked? What did not work? Did you receive the various consumer pieces in a timely manner in order to utilize it in your 2014 campaign? If not when would you have liked to receive them?
5. How did your tax customers respond to your efforts to inform them about opportunities to save a portion of their refund? Please provide your general impressions about the level of customer receptiveness and/or acceptance.
6. Please provide any guidance you may have on how the CFPB can better support your tax campaign's efforts to promote savings at tax time in future years.