

## **Background**

During the 2017 tax season the Consumer Financial Protection Bureau (CFPB) will be conducting a pilot project to assist your organization and other community Volunteer Income Tax Assistance programs in encouraging and promoting saving by consumers during the process of completing their income tax returns. In order to better coordinate activities and provide the training, information and materials to the participating tax programs in a timely manner we are seeking responses to the following questions.

## **Questions for Volunteer Income Tax Assistance (VITA) Partners**

1. Approximately how many tax returns do you estimate you will prepare in 2017?
2. How many tax sites will be part of your campaign in 2017?
3. On what date will you open your tax sites?

## **Staff/Volunteer Training**

The CFPB training for staff, volunteers and trainers will be delivered via webinar and will take approximately 1 hour. CFPB will also provide a guide for training participants and may also provide additional materials (handouts or job aids).

4. Approximately how many tax prep volunteers and staff do you expect to train for 2017?
5. On what date(s) and times do you plan to offer volunteer/staff training?
6. If we cannot provide webinar training live for volunteers would you be able access YouTube and play back a recorded webinar for the volunteers?
7. By what date would you need to receive CFPB training guides and other job aids in order to distribute them to your volunteers?
8. By what date would you need to receive social media posts and graphics to share with potential customers to encourage them to come to your location for tax help?
9. By what date would you need to receive consumer facing materials (flyers, posters, brochures, etc.) in order to have them available for your customers at tax sites?

## **Live Trainings**

We will offer 4 live trainings and will attempt to select times that are accessible to pilot participants. Please indicate your preferred days and times below.

10. Please select the time zone for your VITA sites from the list below.
  - a. Eastern Standard Time (EST)
  - b. Central Standard Time (CST)
  - c. Mountain Standard Time (MST)
  - d. Pacific Standard Time (PST)
11. Please select your preferred time of day
  - a. AM
  - b. PM
12. Please select the day of the week preference.
  - a. Monday thru Friday
  - b. Saturday

## **Additional Comments**

13. Please add any additional questions or comments in the space below.

***Privacy Notice***

The information that you provide through your responses to this survey will be used by the Consumer Financial Protection Bureau to help coordinate efforts related to its Tax Time Savings Campaign – including the distribution of educational materials to interested partners. The CFPB will request no information that directly identifies you as part of this survey.

The collection of this information is legal under U.S. law, § 1013(d)(2)(F). Your participation is voluntary.

Responses are collected by the Consumer Financial Protection Bureau through SurveyMonkey, a private entity. Your use of SurveyMonkey is subject to the SurveyMonkey [Privacy Policy](#).

**Paperwork Reduction Act**

According to the Paperwork Reduction Act of 1995, a Federal agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The OMB control number for this collection is 3170-0036. It expires on 08/31/2019. The time required to complete this information collection is estimated to average approximately 15 minutes per response, including the time for reviewing any instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Comments regarding this collection of information, including the estimated response time, suggestions for improving the usefulness of the information, or suggestions for reducing the burden to respond to this collection should be submitted to Bureau at the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to [CFPB\\_PRA@cfpb.gov](mailto:CFPB_PRA@cfpb.gov).