

End of 2017 Tax Season Online Survey for Frontline Staff and Volunteers

Thank you for completing this survey for the Consumer Financial Protection Bureau (CFPB). The CFPB has been involved for several years in supporting tax time savings promotion initiatives across the country, and is very interested in collecting input from tax site staff and volunteers like you who work directly with taxpayers. While participation in this survey is strictly voluntary, the information you provide will be extremely helpful to the Bureau in getting a better understanding about savings promotion strategies can best be organized and implemented.

Please note that the Bureau intends to keep your responses private to the extent permitted by law, and when results are reported none of your answers will be connected to your organization.

We estimate that this survey will take no more than 15 minutes to complete. We would appreciate your reply by May 15, 2017. If you have any questions, please contact [ICF survey contact] at [phone number] or [email address].

Privacy Act Statement

5 U.S.C. 552(a)(e)(3)

The information you provide through your responses to ICF will assist the study sponsor, the Consumer Financial Protection Bureau (“CFPB”), in getting a better understanding about savings promotion strategies can best be organized and implemented.

The CFPB will not obtain any personally identifiable information, and will only receive aggregated, de-identified data from ICF.

Information collected on behalf of the Bureau by ICF will be treated in accordance with the System of Records Notice (“SORN”), [CFPB.021 Consumer Education and Engagement Records, 79 FR 78839](#). This information will not be disclosed as outlined in the Routine Uses for the SORN. Direct identifying information will only be used by ICF to facilitate the study and will be kept private except as required by law.

This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512.

Participation in this study is voluntary, you are not required to participate or share any identifying information with ICF and you may withdraw participation at any time.

Paperwork Reduction Act Statement

According to the Paperwork Reduction Act of 1995, “an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid Office of Management and Budget (OMB) control number.” The OMB control number for this collection is 3170-0036 and expires 8/31/2019. The time required to complete this information collection is estimated to average approximately 15 minutes per response. 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 the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to CFPB_PRA@cfpb.gov.

1. With which organization did you work during the 2017 tax season? (*dropdown menu of participating organizations*)
2. What roles did you play with your community tax program during the 2017 tax season? *Check all that apply.* (RESPONSE OPTIONS: Greeter or intake screener/return preparer/quality reviewer/site coordinator/other (please specify))
3. As part of your role, were you asked to encourage taxpayers to save at least a portion of any refund they received? (RESPONSE OPTIONS: Yes/No)

If Yes:

- a. On a scale of 1 (least prepared) to 5 (most prepared), how prepared did you feel to encourage taxpayers to save? (RESPONSE OPTIONS: 1 to 5, N/A)
 - *If 1 or 2: Why didn't you feel prepared to encourage taxpayers to save?*
- b. On a scale of 1 (least comfortable) to 5 (most comfortable), how comfortable did you personally feel encouraging taxpayers to save part of their tax refunds? (RESPONSE OPTIONS: 1 to 5, N/A)
 - *If 1 or 2: Why didn't you feel comfortable encouraging taxpayers to save?*
- c. How could the training that you received in encouraging taxpayers to save have been more effective?

Please answer the following questions about specific products through which taxpayers can save during tax time.

4. New savings accounts

- a. Did your tax site help taxpayers open new savings accounts, either onsite or by assisting them with opening accounts at local financial institutions? (RESPONSE OPTIONS: Yes/No/Don't know)

If Yes:

- i. On a scale of 1 (not very interested) to 5 (very interested), how interested did you find taxpayers to be in opening new savings accounts for the purposes of saving some or all of their refunds? (RESPONSE OPTIONS: 1 to 5, or don't know)
- ii. What did taxpayers like about this product?
- iii. What did taxpayers not like about this product?

5. New prepaid debit cards

- a. Did your tax site help taxpayers open new prepaid debit card accounts for the purposes of saving? (RESPONSE OPTIONS: Yes/No/Don't know)

If Yes:

- i. On a scale of 1 (not very interested) to 5 (very interested), how interested did you find taxpayers to be in opening new prepaid debit card accounts for the purposes of saving some or all of their refunds? (RESPONSE OPTIONS: 1 to 5, or don't know)
- ii. What did taxpayers like about this product?
- iii. What did taxpayers not like about this product?

6. Form 8888

- a. Did your tax site offer taxpayers the opportunity to save some or all of their refunds using IRS Form 8888? (RESPONSE OPTIONS: Yes/No/Don't know)

If Yes:

- i. On a scale of 1 (not very interested) to 5 (very interested), how interested did you find taxpayers to be in saving using Form 8888? (RESPONSE OPTIONS: 1 to 5, or don't know)
- ii. What did taxpayers like about this product?
- iii. What did taxpayers not like about this product?

7. myRA account

- a. Did your tax site offer taxpayers the opportunity to open a myRA account for the purposes of saving some or all of their refunds? (RESPONSE OPTIONS: Yes/No/Don't know)

If Yes:

- i. On a scale of 1 (not very interested) to 5 (very interested), how interested did you find taxpayers to be in opening a myRA account for the purposes of saving some or all of their refunds? (*RESPONSE OPTIONS: 1 to 5, or don't know*)
- ii. What did taxpayers like about this product?
- iii. What did taxpayers not like about this product?

8. U.S. savings bond

- a. Did your tax site offer taxpayers the opportunity to save some or all of their refunds by purchasing a savings bond? (RESPONSE OPTIONS: Yes/No/Don't know)

If Yes:

- i. On a scale of 1 (not very interested) to 5 (very interested), how interested did you find taxpayers to be in saving some or all of their refunds by purchasing a savings bond? (*RESPONSE OPTIONS: 1 to 5, or don't know*)
- ii. What did taxpayers like about this product?
- iii. What did taxpayers not like about this product?

9. What do you see as the biggest challenges to encouraging taxpayers to save part of their tax refunds?

10. What strategies, if any, did your tax site use to encourage taxpayers to save that you found particularly effective?

11. Are there any tools or resources that would make it easier for you to encourage tax time savings among the taxpayers with whom you work?

12. On a scale of 1 (none) to 5 (a great deal), how much emphasis do you think tax sites should place on encouraging saving tax refund dollars? (*RESPONSE OPTIONS: 1 to 5, or don't know*)

- a. Please explain your answer to the previous question.