



Earned Income Tax Credit/Asset Building Survey for the 2009 Tax Year

United Way: _____

Counties served: _____

Did you complete this survey last year? Yes No

Do you know how much the estimated unclaimed credits to your community are? Yes No

If so, how much? \$ _____

How many VITA sites do you operate? _____

How many returns were prepared this year by VITA sites associated with your UW? _____

How many returns were prepared last year by VITA sites associated with your UW? _____

How many EITC clients did you serve this year? _____

What % have a disability or a family member with a disability? _____ %

How much in **total** refunds resulted from project? \$ _____

Total State refunds? \$ _____

Total Federal refunds? \$ _____

How much in EITC refunds resulted from your project? \$ _____

How many volunteers were involved (tax prep and other roles)? _____

How many hours did they contribute? _____

What other roles did your United Way play in the EITC effort?
(Training, securing resources, marketing, etc.) Please specify:

Are you linking with other providers to offer other services? Yes No

If so, what services?

Who are the other providers by category?

Are you using www.mybenefits.ny.gov to screen for other public benefits? Yes No

Are you using 2-1-1 to support your EITC efforts? Yes No

Please describe how:

How many Super Saturday events did you sponsor this year? _____

What success have you have in facilitating savings, for example:
(Please respond with numeric data, if possible and provide % that were persons with a disability)

	Total	% disabled
▪ New bank account opened	_____	_____%
▪ Split refunds	_____	_____%
▪ Savings Bonds purchased	_____	_____%

Narrative information is also helpful:



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Is your EITC effort funded?

Yes No

How much?

\$ _____

Who is funding it?

•Federal?

Amount

\$ _____

•State?

\$ _____

•Municipality?

\$ _____

•Private Sources? *(Please Identify)*

\$ _____

Do you keep track of success stories?

Yes No

Please share one:

Do you survey filers to track/record how the refund is going to be spent?

Yes No

Please describe some of the uses for the EITC refund.

Do you have any records of individuals who have improved their financial self-sufficiency and no longer are eligible for EITC?

Yes No

Please provide a brief description:

Are you tracking individuals receiving EITC refunds and their participation in Financial literacy education? Please provide total number of referrals and the % of those who had a disability.

Yes No

How many did you refer?

Total

% disabled
_____%

How many enrolled?

_____%

Are you surveying for repeat EITC filers?

Yes No

If so, how many years have you been tracking for filers who now file each year?

What % of your EITC filers were repeat customers?

_____%

Are you noticing any further impact of Chapter 432, Laws of 2008 requiring RAL disclosure?

Yes No

What? (i.e., additional traffic at your VITA sites, greater use of e-filing, direct deposit of refund checks, etc.)

Person completing this form:

Contact info (phone/er
