

Master Campaign Data Report
 Prepared by Urban Strategies Council
 Preparation Date: 08/22/2008

Introduction

These tables contain data for all sites in the Alameda County Campaign. Please refer to the accompanying report titled, **Report on the 2008 Earned Income Tax Credit (EITC) Campaign**, for definitions and descriptions of the specific variables in these tables. For comparison purposes, data from all campaign years are included.

Most data were obtained from the tax returns that were sent to the Urban Strategies Council and do not include: 1) data from those filers who declined to have their data sent to the Council; or 2) data from the four cooperating sites. Several pieces of data were reported by the sites and, therefore, are complete totals.

Table 1: Number of Sites, 2002-2007

	Number of VITA Sites					
	2002	2003	2004	2005	2006	2007
Campaign Sites	12	18	19	20	17	19
Cooperating Sites	3	3	2	3	5	4
Total	15	21	21	23	22	23

Source: Asset and Operations Data Form (filled out by VITA site coordinators)

Table 2: Number of Volunteers, 2002-2007

	Number of Volunteers						Annual % Change	Total % Change
	2002	2003	2004	2005	2006	2007	2006-2007	2002-2007
Campaign Sites	160	344	237	170	236	239**	1.3%	49.4%
Cooperating Sites*	154	145	89	182	10	N/A	N/A	N/A
Total	314	489	326	352	246	239	-2.8%	-23.9%

Source: Asset and Operations Data Form (filled out by VITA site coordinators)

* Incomplete data from cooperating sites

** No data from People's Community Partnership Federal Credit Union and Healthy Oakland

Table 3: Total Returns, Refunds and EITC, 2007

	# of Federal Returns Filed	Total Federal Refunds	Average Federal Refund	Total EITC Refunds	Average EITC Amount	Percent of Filers Claiming EITC
Campaign Sites	7,307	\$6,826,785	\$934	\$3,431,363	\$2,040	23.0%
Cooperating Sites**	514	\$423,359	\$824	\$106,119	\$2,298*	8.9%*
Total - All Sites Combined	7,821	\$7,250,144	\$927	\$3,537,482	\$2,042*	22.7%*

Source: TaxWise Summary Reports

* Computation excludes data from CSU East Bay

** No data from Acorn Computer Learning Center

Table 4: Federal Returns Annual Change, 2002-2007

	Number of Federal Returns Filed						Annual % Change	Total % Change
	2002	2003	2004	2005	2006	2007	2006-2007	2002-2007
Campaign Sites	1,939	3,129	3,873	5,139	5,511	7,307	32.6%	276.8%
Cooperating Sites	210	822	737	777	1,231	514*	-58.2%	144.8%
Total	2,149	3,951	4,610	5,916	6,742	7,821	16.0%	263.9%

Source: TaxWise Summary Reports

* No data from Acorn Computer Learning Center

Table 5: EITC Dollars Annual Change, 2002-2007

	EITC Dollars Captured						Annual % Change	Total % Change
	2002	2003	2004	2005	2006	2007	2006-2007	2002-2007
Campaign Sites	\$1,521,722	2,175,915	\$2,393,131	\$2,898,812	\$2,732,031	\$3,431,363	25.6%	125.5%
Cooperating Sites*	\$282,080	334,469	\$323,833	\$398,602	\$349,621	\$106,119	-69.6%	-62.4%
Total	\$1,803,802	2,510,384	\$2,716,964	\$3,297,414	\$3,081,652	\$3,537,482	14.8%	96.1%

Source: TaxWise Summary Reports

* Incomplete data from cooperating sites

Table 6: Federal Refund Annual Change, 2002-2007

	Amount of Federal Refunds						Annual % Change	Total % Change
	2002	2003	2004	2005	2006	2007	2006-	2002-
Campaign Sites	\$2,505,040	3,661,166	\$4,323,592	\$4,475,583	\$5,706,711	\$6,826,785	19.6%	172.5%
Cooperating Sites*	\$304,387	656,422	\$590,571	\$364,884	\$1,034,184	\$423,359	-59.1%	39.1%
Total	\$2,809,427	4,317,588	\$4,914,163	\$4,840,467	\$6,740,895	\$7,250,144	7.6%	158.1%

Source: TaxWise Summary Reports

* Incomplete data from cooperating sites

Table 7: Federal Return Preparation, 2002-2007

Measure	2002		2003		2004		2005		2006		2007		2002-2007
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Total % Change
Return Preparation													
Electronic	1,612	83.0%	2,435	81.9%	3,024	78.6%	4,274	84.7%	5,732	85.2%	7,142	91.4%	343.1%
Paper	327	17.0%	537	18.1%	822	21.4%	771	15.3%	993	14.8%	675	8.6%	106.4%

Source: TaxWise Summary Reports (Totals may combine to more than reported Federal Returns due to rejected and other return types)

Table 8: Federal Return Filing Status, 2002-2007

Measure	2002		2003		2004		2005		2006		2007		2002-2007
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Percentage Point Change**
Return Preparation*													
Single	820	42.3%	1,413	47.5%	2,086	53.9%	2,762	55.6%	4,038	60.8%	4,657	62.3%	20.0%
Married - Joint	420	21.6%	578	19.4%	768	19.9%	1,008	20.3%	1,187	17.9%	1,324	17.7%	-3.9%
Married - Separate	14	0.7%	15	0.5%	26	0.7%	35	0.7%	55	0.8%	60	0.8%	0.1%
Head of Household	685	35.3%	967	32.5%	984	25.4%	1,160	23.3%	1,361	20.5%	1,428	19.1%	-16.2%
Qualifying Widow	1	0.1%	1	0.0%	5	0.1%	3	0.1%	0	0.0%	6	0.1%	0.0%
Total	1,940	100.0%	2,974	100.0%	3,869	100.0%	4,968	100.0%	6,641	100.0%	7,475	100.0%	

Source: TaxWise Summary Reports

* Incomplete data from cooperating sites

** "Percentage Points Change" is the arithmetic difference of two percentages or proportions.

Table 9: Ethnicity of Tax Filer, 2002-2007

Measure	2002		2003		2004		2005		2006		2007		2002-2007
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Percentage Point Change*
African American	565	24.8%	805	31.4%	723	28.0%	750	26.8%	1,173	26.7%	1,392	29.9%	5.0%
White	206	9.1%	229	8.9%	235	9.1%	270	9.6%	391	8.9%	448	9.6%	0.6%
Asian/Pacific Islander	335	14.7%	464	18.1%	593	23.0%	725	25.9%	988	22.5%	1,171	25.1%	10.4%
Latino/Hispanic	559	24.6%	788	30.7%	752	29.1%	844	30.2%	1,344	30.6%	1,168	25.1%	0.5%
Native American/Alaskan Native	108	4.7%	25	1.0%	23	0.9%	31	1.1%	30	0.7%	33	0.7%	-4.0%
Other	502	22.1%	255	9.9%	254	9.8%	178	6.4%	351	8.0%	356	7.6%	-14.4%
Decline to Answer	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	109	2.5%	90	1.9%	N/A
Total	2,275	100.0%	2,566	100.0%	2,580	100.0%	2,798	100.0%	4,386	100.0%	4,658	100.0%	

Source: TaxWise Backups; TaxWise Online Reports

* "Percentage Points Change" is the arithmetic difference of two percentages or proportions.

Table 10: Bank Accounts, 2003-2007

Measure	2003		2004		2005		2006		2007		2003-2007 Percentage Points Change*
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	
With a Checking Bank Account	1,003	41.8%	1077	43.5%	1074	40.4%	1,617	36.4%	1715	36.5%	-5.3%
With a Savings Account	196	8.2%	236	9.5%	206	7.8%	344	7.7%	271	5.8%	-2.4%
With Both Checking & Savings Accounts	597	24.9%	705	28.5%	919	34.6%	1,483	33.4%	1678	35.7%	10.8%
Without Bank Accounts But Want One	189	7.9%	161	6.5%	155	5.8%	260	5.9%	263	5.6%	-2.3%
Without Bank Accounts and Not Interested	414	17.3%	245	9.9%	252	9.5%	305	6.9%	293	6.2%	-11.0%
Without Bank Account and Do Not Qualify	N/A	N/A	54	2.2%	50	1.9%	70	1.6%	105	2.2%	N/A
Decline to Answer	N/A	N/A	N/A	N/A	N/A	N/A	364	8.2%	372	7.9%	N/A
Total	2,399	100.0%	2,478	100.0%	2,656	100.0%	4,443	100.0%	4,697	100.0%	

Source: TaxWise Backups; TaxWise Online Reports

* "Percentage Points Change" is the arithmetic difference of two percentages or proportions.

Table 11: Health Insurance Coverage for the Family, 2004-2007

Measure	2004		2005		2006		2007		2004-2007 Percentage Points Change*
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	
No, but I'm interested in receiving information	103	4.3%	634	22.1%	950	21.4%	1,066	22.6%	18.3%
Not for all members and I'm interested in receiving information	246	10.3%	124	4.3%	179	4.0%	198	4.2%	-6.1%
No, and I am not interested	128	5.3%	265	9.2%	563	12.7%	490	10.4%	5.1%
Yes, my children have Healthy Families	695	29.0%	125	4.4%	219	4.9%	214	4.5%	-24.5%
Yes, MediCal for myself and/or my children	487	20.3%	715	24.9%	905	20.4%	1,118	23.7%	3.4%
Yes, through my employer for myself and/or my children	135	5.6%	535	18.7%	805	18.1%	755	16.0%	10.4%
Yes, I purchase private insurance for myself and/or my children	602	25.1%	153	5.3%	230	5.2%	235	5.0%	-20.1%
Decline to answer	N/A	N/A	316	11.0%	588	13.2%	636	13.5%	N/A
Total	2396	100.0%	2867	100.0%	4,439	100.0%	4,712	100.0%	

Source: TaxWise Backups; TaxWise Online Reports

* "Percentage Points Change" is the arithmetic difference of two percentages or proportions.

Table 12: Last Year's Preparation Method, 2003, 2005-2007

Measure	2003		2005		2006		2007		2003-2007 Percentage Points Change*
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	
Did Not File	687	27.0%	505	19.0%	844	18.6%	1076	22.8%	-4.2%
Filed at the Same Site	528	20.7%	878	33.0%	1626	35.8%	1670	35.4%	14.6%
Filed at Other Free Tax Preparation Site	467	18.3%	414	15.6%	445	9.8%	407	8.6%	-9.7%
Did Own Tax Preparation	125	4.9%	158	5.9%	251	5.5%	192	4.1%	-0.8%
Had Family or Friend File Taxes	183	7.2%	200	7.5%	223	4.9%	261	5.5%	-1.7%
Commercial Preparer & Got Instant Refund	200	7.9%	167	6.3%	222	4.9%	437	9.3%	1.4%
Commercial Preparer & Did Not Go for the Instant Refund	138	5.4%	143	5.4%	168	3.7%	134	2.8%	-2.6%
Paid Someone Else & Got Instant Refund	70	2.7%	64	2.4%	198	4.4%	90	1.9%	-0.8%
Paid Someone Else & Did Not Go for the Instant Refund	148	5.8%	133	5.0%	229	5.0%	170	3.6%	-2.2%
Decline to Answer	N/A	N/A	N/A	N/A	341	7.5%	283	6.0%	N/A
Total	2,546	100.0%	2,662	100.0%	4,547	100.0%	4,720	100.0%	

Source: TaxWise Backups; TaxWise Online Reports

* "Percentage Points Change" is the arithmetic difference of two percentages or proportions.

Table 13a: How Filers Learned About Campaign, 2003**

Measure*	2003	
	Count	Percent of Total
Ads	176	4.8%
Flyers	746	20.3%
Ads or Flyers	922	25.1%
Walking By	80	2.2%
Friends or Family	525	14.3%
From Someone Else	347	9.5%
Word of Mouth (Friends, Family, or Someone Else)	872	23.8%
Total	3,668	100.0%

Table 13b: How Filers Learned About Campaign, 2004-2007**

Measure*	2004		2005		2006		2007		2004-2007 Percentage Points Change***
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total	
I Came Here Last Year	540	21.4%	596	21.8%	1,257	28.2%	1,178	24.9%	3.5%
Flyer or Poster	800	31.7%	787	28.7%	928	20.8%	1,145	24.2%	-7.5%
I Heard About it on the Radio	7	0.3%	22	0.8%	32	0.7%	25	0.5%	0.3%
I Walked By	120	4.8%	145	5.3%	204	4.6%	246	5.2%	0.5%
I Saw it in the Newspaper	65	2.6%	132	4.8%	202	4.5%	137	2.9%	0.3%
I Saw it on TV	32	1.3%	46	1.7%	47	1.1%	75	1.6%	0.3%
Not sure	28	1.1%	20	0.7%	36	0.8%	40	0.8%	-0.3%
Friend or Family Member Told Me	685	27.2%	740	27.0%	1,114	25.0%	1,149	24.3%	-2.8%
Someone Else Told Me	246	9.8%	251	9.2%	394	8.8%	338	7.2%	-2.6%
Volunteer visited my house or left door hanger	N/A	N/A	N/A	N/A	N/A	N/A	119	2.5%	N/A
Decline to Answer	N/A	N/A	N/A	N/A	242	5.4%	270	5.7%	N/A
Total	2,523	100.0%	2,739	100%	4,456	100.0%	4,722	100.0%	

Source: TaxWise Backups; TaxWise Online Reports

* Categories not mutually exclusive

** Two separate tables because response options have changed

*** "Percentage Points Change" is the arithmetic difference of two percentages or proportions.

Table 14a: Recipient of Public Benefits Last Year, 2003-2005**

Measure*	2003		2004		2005	
	Count	Percent of Total	Count	Percent of Total	Count	Percent of Total
Received Public Benefits	850	37.8%	860	35.4%	753	29.1%
Did Not Receive Public Benefits But Would Like to Apply	266	11.8%	343	14.1%	328	12.7%
Did Not Receive Public Benefits and Not Interested	1,132	50.4%	551	22.7%	620	24.0%
Not received public benefits and not eligible	N/A	N/A	595	24.5%	709	27.4%
Don't recall	N/A	N/A	79	3.3%	178	6.9%
Total	2,248	100.0%	2,428	100.0%	2,588	100.0%

Table 14b: Recipient of Public Benefits Last Year, 2006-2007**

Measure*	2006		2007	
	Count	Percent of Total	Count	Percent of Total
No, but interested in receiving information	1,037	23.4%	1,381	29.2%
Not for all members and interested in receiving information	110	2.5%	117	2.5%
No and not interested in receiving information	1,912	43.1%	1,779	37.6%
Yes, receive Food Stamps Only	394	8.9%	319	6.7%
Yes, receive CalWORKS	323	7.3%	335	7.1%
Yes, receive General Assistance	125	2.8%	131	2.8%
Decline to Answer	532	12.0%	667	14.1%
Total	4,433	100.0%	4,729	100.0%

Source: TaxWise Backups; TaxWise Online Reports

* Categories not mutually exclusive

** Two separate tables because response options have changed

Table 15: Disability Status in Household and Contact for Information, 2006-2007

Measure	2006		2007	
	Count	Percent of Total	Count	Percent of Total
Yes	1,409	37.6%	763	16.4%
No	1,595	42.6%	3,465	74.7%
Decline	744	19.9%	412	8.9%
Total	3,748	100.0%	4,640	100.0%

Source: TaxWise Backups; TaxWise Online Reports

Table 16: Children Aged 0-5 years, 2006 - 2007

Measure	2006		2007	
	Count	Percent of Total	Count	Percent of Total
Filers with Children Aged 0-5 years	561	11.8%	348	12.6%
Children Aged 0-5 years	N/A		429	

Source: TaxWise Backups

Table 17: Additional Asset Building Data, 2003-2007

Asset Development Activities	2003	2004	2005	2006	2007	2003-2007
	Count	Count	Count	Count	Count	Total % Change
Pre-Screened for Food Stamps	41	237	88	N/A	N/A	N/A
Bank Accounts Opened	24	60	209	61	91	279.2%
Enrollment in Financial Education Program	9	42	92	33	67	644.4%

Source: Asset and Operations Data Form (filled out by VITA site coordinators)

Table 18: Additional Operations Data, 2005-2007**

Measure	2005	2006	2007	2005-2007
	Count	Count	Count	Total % Change
Return Preparation Sites	20	22	23	15.0%
People Preparing Returns	352	246	239	-32.1%
Volunteers starting tax assistance training	280	261	263	-6.1%
Volunteers Certified for Return Preparation	221	259	215	-2.7%
Rejected Returns	407	324	464	14.0%
Resubmitted and Accepted Returns	360	191	418	16.1%
Manually Prepared Returns	31	285	158	409.7%
Prior Year Returns*	140	216	378	170.0%

Source: Asset and Operations Data Form (filled out by VITA site coordinators)

* Prior year returns are tax returns from earlier tax years (2006 and prior) that were filed this tax year, 2007

** Includes data from cooperating sites when available

Table 19: How filers paid for financial emergency between paychecks

Measure	2007	
	Count	Percent
Used my savings	753	16.5%
Put it on my credit card	512	11.3%
Borrowed from family/friend	1071	23.5%
Took out a payday loan (e.g. from a check cashing ctr)	140	3.1%
Did not address the emergency until I had funds	244	5.4%
Went without food or other necessities to pay for it	202	4.4%
Decline to answer	1629	35.8%

Source: TaxWise Backups; TaxWise Online Reports