

**Site Report: Oakland Site Report**  
**Prepared by Urban Strategies Council**  
**Preparation Date: 8/22/08**

**Introduction**

These tables contain data for all Oakland sites. 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 previous campaign years are also 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 cooperating sites. Several pieces of data were reported by all the sites and, therefore, are complete totals.

**Volunteers**

<b>Table 1: Volunteers (Operations)</b>					
<b>Measure</b>	<b>Oakland Sites</b>				
	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>	<b>2003</b>
Persons Providing Tax Assistance (Paid & Volunteer)	94	N/A	115	160	169

**Tax Return Data**

<b>Table 2: Types of Tax Filing</b>										
<b>Measure</b>	<b>Oakland Sites</b>									
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>	<b>2005</b>	<b>2005%</b>	<b>2004</b>	<b>2004%</b>	<b>2003</b>	<b>2003 %</b>
Number Filing...										
Returns	5,011	100.0%	3,551	100.0%	2,878	100.0%	2,202	62.0%	1,639	100.0%
Federal Returns (Electronic)	4,359	87.5%	2,944	82.9%	2,191	76.1%	1,557	71.3%	1,056	75.3%
Federal Returns (Paper)	621	12.5%	607	17.1%	689	23.9%	627	28.7%	346	24.7%
State Returns	4,237*	100.0%	3,074	100.0%	1,358	100.0%	1502	100.0%	1,488	100.0%

\* No data from cooperating sites and People's Community Partnership Federal Credit Union

<b>Table 3: Filing Status</b>										
<b>Measure</b>	<b>Oakland Sites</b>									
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>	<b>2005</b>	<b>2005%</b>	<b>2004</b>	<b>2004%</b>	<b>2003</b>	<b>2003 %</b>
As Single	3,176	63.4%	2,122	59.8%	1,591	57.6%	1,232	55.9%	768	49.5%
As Married-Joint	883	17.6%	655	18.4%	584	21.1%	449	20.4%	317	20.5%
As Married-Separate	55	1.1%	39	1.1%	18	0.7%	19	0.9%	10	0.6%
As Head of Household	892	17.8%	735	20.7%	569	20.6%	500	22.7%	455	29.4%
As Qualifying Widower	5	0.1%		0.0%	0	0.0%	2	0.1%	0	0.0%
<b>Total*</b>	<b>5,011</b>	<b>100.0%</b>	<b>3,551</b>	<b>100.0%</b>	<b>2,762</b>	<b>100.0%</b>	<b>2,202</b>	<b>100.0%</b>	<b>1,550</b>	<b>100.0%</b>

\* This total does not include data from prior years or cooperating sites, please see Table 2 for those figures.

<b>Table 4: Refunds Claimed</b>					
<b>Measure</b>	<b>Oakland Sites</b>				
	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>	<b>2003</b>
Total Federal Refunds Claimed	\$4,411,171	\$3,423,730	\$2,782,358	\$2,174,340	\$1,694,212
Total State Refunds Claimed	\$ 372,609	\$ 380,430	\$ 225,364	\$ 152,270	\$ 162,023
Average Refund Claimed	\$ 880	\$ 964	\$ 1,630	\$ 929	\$ 1,492
Number Using Direct Deposit (Federal Tax)	404*	664	354	297	189

\* No data from cooperating sites and online sites

<b>Table 5: Tax Liability</b>					
<b>Measure</b>	<b>Oakland Sites</b>				
	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>	<b>2003</b>
Average Total Federal Tax	\$ 897	\$ 808	\$ 818	\$ 741	\$ 1,367

<b>Table 6: Value of Tax Claims</b>					
<b>Measure</b>	<b>Oakland Sites</b>				
	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>	<b>2003</b>
Total Child & Dependent Care Credit*	\$ 9,307	\$ 19,565	\$ 14,790	\$ 10,983	\$ 14,796
Total Child Tax Credit*	\$ 356,752	\$ 803,380	\$ 510,234	\$ 428,471	\$ 352,993
Total Earned Income Tax Credit	\$2,148,461	\$1,610,616	\$1,399,261	\$1,212,343	\$ 974,686
Total Education Credit*	\$ 29,590	\$ 69,545	\$ 27,909	\$ 33,660	\$ 37,437
Total Unemployment Compensation*	\$ 500,103	\$ 918,356	\$ 663,781	\$ 622,695	\$ 945,804

\* No data from cooperating sites and online sites

<b>Table 7: Median Dependents and Income</b>					
<b>Measure</b>	<b>Oakland Sites</b>				
	<b>2007</b>	<b>2006</b>	<b>2005</b>	<b>2004</b>	<b>2003</b>
Average Number of Dependents	0.65*	0.75	NA	NA	NA
Average Number of Qualifying Children	1.63*	NA	NA	NA	NA
Median Adjusted Gross Income	\$ 15,240	\$ 14,982	\$ 13,683	\$ 14,000	\$ 12,714

\* No data from cooperating sites and online sites

**Survey Data**

<b>Table 8: Ethnicity of Filers</b>										
<b>Measure</b>	<b>Oakland Sites</b>									
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>	<b>2005</b>	<b>2005%</b>	<b>2004</b>	<b>2004 %</b>	<b>2003</b>	<b>2003 %</b>
Black or African American	988	38.0%	914	33.0%	479	30.2%	430	31.9%	420	32.1%
Asian or Pacific Islander	700	26.9%	513	18.5%	435	27.4%	279	20.7%	256	19.6%
White	89	3.4%	144	5.2%	65	4.1%	71	5.3%	53	4.1%
Latino/Hispanic	645	24.8%	934	33.8%	522	32.9%	435	32.3%	447	34.2%
Native American or Alaskan Natives	14	0.5%	21	0.8%	13	0.8%	9	0.7%	13	1.0%
Other Race	121	4.7%	176	6.4%	71	4.5%	124	9.2%	118	9.0%
Decline to Answer	42	1.6%	64	2.3%	N/A	N/A	N/A	N/A	N/A	N/A
<b>Total</b>	<b>2,599</b>	<b>100.0%</b>	<b>2,766</b>	<b>100.0%</b>	<b>1,585</b>	<b>100.0%</b>	<b>1,348</b>	<b>100.0%</b>	<b>1,307</b>	<b>100.0%</b>

<b>Table 9: Last Year's Preparation Method</b>										
<b>Measure</b>	<b>Oakland Sites</b>									
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>	<b>2005</b>	<b>2005%</b>	<b>2004</b>	<b>2004%</b>	<b>2003</b>	<b>2003 %</b>
Did Not File	669	25.1%	559	20.0%	301	20.4%	379	29.6%	336	27.6%
Filed at the Same Site	852	32.0%	978	34.9%	477	32.3%	266	20.8%	273	22.5%
Filed at Other Free Tax Preparation Site	259	9.7%	318	11.4%	259	17.5%	354	27.7%	259	21.3%
Did Their Own Tax Prep.	96	3.6%	112	4.0%	70	4.7%	109	8.5%	60	4.9%
Had Family or Friend File Tax	138	5.2%	126	4.5%	102	6.9%	63	4.9%	68	5.6%
Commercial Preparer & Got Instant Refund	223	8.4%	66	2.4%	90	6.1%	36	2.8%	84	6.9%
Commercial Preparer & Did Not Go for the Instant Refund	73	2.7%	163	5.8%	65	4.4%	0	0.0%	35	2.9%
Paid Someone Else & Got Instant Refund	55	2.1%	130	4.6%	40	2.7%	0	0.0%	41	3.4%
Paid Someone Else & Did Not Go for the Instant Refund	114	4.3%	91	3.2%	72	4.9%	73	5.7%	60	4.9%
Decline to Answer	187	7.0%	258	9.2%	N/A	N/A	N/A	N/A	N/A	N/A
<b>Total</b>	<b>2,666</b>	<b>100.0%</b>	<b>2,801</b>	<b>100.0%</b>	<b>1,476</b>	<b>100.0%</b>	<b>1,280</b>	<b>100.0%</b>	<b>1,216</b>	<b>100.0%</b>

Measure	Oakland Sites			
	2007	2007%	2006	2006%
No, but I'm interested in receiving information	639	23.9%	618	22.1%
Not for all members and I'm interested in receiving information	80	3.0%	109	3.9%
No, and I am not interested	295	11.0%	338	12.1%
Yes, my children have Healthy Families	105	3.9%	128	4.6%
Yes, MediCal for myself and/or my children	639	23.9%	541	19.4%
Yes, through my employer for myself and/or my children	417	15.6%	500	17.9%
Yes, I purchase private insurance for myself and/or my children	128	4.8%	135	4.8%
Decline to answer	371	13.9%	425	15.2%
<b>Total</b>	<b>2,674</b>	<b>100.0%</b>	<b>2,794</b>	<b>100.0%</b>

Measure**	Oakland Sites							
	2007	2007%	2006	2006%	2005	2005%	2004	2004%
I came here last year	595	22.2%	803	28.6%	321	20.9%	275	21.1%
Flyer or Poster	628	23.4%	559	19.9%	434	28.3%	355	27.3%
I heard it on the radio	14	0.5%	26	0.9%	9	0.6%	7	0.5%
I walked by	112	4.2%	122	4.4%	76	5.0%	71	5.5%
I saw it in the newspaper	72	2.7%	105	3.7%	47	3.1%	27	2.1%
I saw it on TV	43	1.6%	30	1.1%	19	1.2%	14	1.1%
Not sure	17	0.6%	26	0.9%	8	0.5%	21	1.6%
Friend or family member told me	732	27.3%	698	24.9%	474	30.9%	400	30.7%
Someone else told me	189	7.0%	245	8.7%	145	9.5%	131	10.1%
Volunteer visited my house or left door hanger	98	3.6%	N/A	N/A	N/A	N/A	N/A	N/A
Decline to Answer	185	6.9%	189	6.7%				
<b>Total</b>	<b>2,685</b>	<b>100.0%</b>	<b>2,803</b>	<b>100.0%</b>	<b>1,533</b>	<b>100.0%</b>	<b>1,301</b>	<b>100.0%</b>

Measure**	Oakland Sites	
	2003	2003%
Ads	77	4.6%
Flyers	287	17.1%
Ads or Flyers	364	21.7%
Walking By	36	2.1%
Friends/Family	275	16.4%
From Someone Else	183	10.9%
Word of Mouth (Friends, Family, or Someone Else)	458	27.3%
<b>Total</b>	<b>1,680</b>	<b>100.0%</b>

\*\*Categories not mutually exclusive

\*\*\*Two separate tables because response options have changed

Measure**	Oakland Sites			
	2007	2007%	2006	2006%
No, but interested in receiving information	750	28.2%	636	22.8%
Not for all members and interested in receiving information	54	2.0%	80	2.9%
No and not interested in receiving information	1,039	39.1%	1,144	41.1%
Yes, receive Food Stamps Only	179	6.7%	270	9.7%
Yes, receive CalWORKs	143	5.4%	213	7.7%
Yes, receive General Assistance	73	2.7%	55	2.0%
Decline to Answer	420	15.8%	386	13.9%
<b>Total</b>	<b>2,658</b>	<b>100.0%</b>	<b>2,784</b>	<b>100.0%</b>

<b>Table 12b: Public Benefits***</b>						
<b>Measure</b>	<b>Oakland Sites</b>					
	<b>2005</b>	<b>2005%</b>	<b>2004</b>	<b>2004%</b>	<b>2003</b>	<b>2003 %</b>
Received Public Benefits	387	26.8%	398	32.2%	325	30.8%
Did Not Receive Public Benefits But Would Like to Apply	185	12.8%	170	13.8%	126	11.9%
Did Not Receive Public Benefits and Not Interested	353	24.4%	297	24.0%	605	57.3%
Not received public benefits and not eligible	385	26.6%	313	25.3%	N/A	N/A
Don't recall	136	9.4%	58	4.7%	N/A	N/A
<b>Total</b>	<b>1,446</b>	<b>100.0%</b>	<b>1,236</b>	<b>100.0%</b>	<b>1,056</b>	<b>100.0%</b>

\*\*Categories not mutually exclusive

\*\*\*Two separate tables because response options have changed

<b>Table 13: Bank Accounts</b>										
<b>Measure</b>	<b>Oakland Sites</b>									
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>	<b>2005</b>	<b>2005%</b>	<b>2004</b>	<b>2004%</b>	<b>2003</b>	<b>2003 %</b>
With a Checking Bank Account	934	34.9%	947	33.8%	532	35.9%	504	40.6%	457	26.1%
With a Savings Account	193	7.2%	232	8.3%	147	9.9%	161	13.0%	118	6.7%
With Both Checking & Savings Accounts	871	32.6%	866	31.0%	513	34.7%	369	29.8%	309	17.6%
Without Bank Accounts But Want One	169	6.3%	206	7.4%	99	6.7%	92	7.4%	613	34.9%
Without Bank Accounts and Not Interested	181	6.8%	208	7.4%	148	10.0%	85	6.9%	126	7.2%
Without Bank Account and Do Not Qualify	74	2.8%	50	1.8%	41	2.8%	29	2.3%	131	7.5%
Decline to Answer	253	9.5%	289	10.3%					N/A	
<b>Total</b>	<b>2,675</b>	<b>100.0%</b>	<b>2,798</b>	<b>100.0%</b>	<b>1,480</b>	<b>100.0%</b>	<b>1,240</b>	<b>100.0%</b>	<b>1,754</b>	<b>100.0%</b>

<b>Table 14: Disability Status in Household</b>				
<b>Measure</b>	<b>Oakland Sites</b>			
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>
Yes	424	16.2%	862	37.3%
No	1,928	73.8%	1,000	43.2%
Decline	260	10.0%	451	19.5%
<b>Total</b>	<b>2,612</b>	<b>100.0%</b>	<b>2,313</b>	<b>100.0%</b>

<b>Table 15: Children Aged 0-5 years</b>				
<b>Measure</b>	<b>Oakland Sites</b>			
	<b>2007</b>	<b>2007%</b>	<b>2006</b>	<b>2006%</b>
Filers with Children Aged 0-5 years	242	5.1%	458	16.6%
Children Aged 0-5 years	302		N/A	

<b>Table 16: How filers paid for financial emergency between paychecks</b>		
<b>Measure</b>	<b>Oakland Sites</b>	
	<b>2007</b>	<b>2007%</b>
Used my savings	753	16.5%
Put it on my credit card	512	11.3%
Borrowed from family/friend	1,071	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	1,629	35.8%
<b>Total</b>	<b>4,551</b>	<b>100.0%</b>