

AMERICA SAVES WEEK

Tracking Document

As you plan for the week, please take the time to fill in the report below to set internal goals. This will also give you all the information needed to fill out our post-week survey. Need help setting internal goals? Contact America Saves Director [Nancy Register](#).

We use information from the post-week survey to document your success, along with others, on our website, through our annual report, and through other media opportunities.

Contact Information

1. What is the name of your organization?
2. Which of these descriptions best fits your organization?
 - a. Non-profit
 - b. Cooperative Extension
 - c. Academic institution
 - d. Government agency (non-military)
 - e. Blogger
 - f. Bank
 - g. Credit union
 - h. Financial services organization
 - i. Industry association or trade group
 - j. For-profit business
 - k. Other
3. Who can we contact for more information?
 - a. Name _____
 - b. State _____
 - c. Email Address _____
4. What is the contact person's phone number? _____

America Saves Actions

5. Through your events and promotion of America Saves Week 2017, did you encourage your audience to take the America Saves pledge?

_____ Yes _____ No

6. Are you affiliated with a free income tax preparation program?

_____ Yes, we operate one or more tax sites _____ No
_____ Yes, through a coalition (but not as a site operator) _____ Not sure

Audience Reach

7. Tell us about your audience reach. What is your best guess of how many people you reached with each of the following methods?

	Internal Goal	Actual Reach
Social media (Facebook, Twitter, etc.)		
Website		
Tax site outreach		
Community events		
Posters/flyers		
E-mails/E-newsletters		
Print publications		
Postal mailings		
Financial counseling/workshops		
Broadcast appearances		
Public service announcements		
Paid or donated advertising		

Questions for Employers

8. As an employer, do you promote America Saves Week to your employees?

Yes

No (go to Q.10)

Do not have employees (go to Q.10)

Workplace Actions

9. How many employees took these actions during America Saves Week?

	Internal Goal	Actual Reach
Started using split direct deposit to save a portion of their pay		
Increased the portion of split direct deposit going into savings		
Enrolled for the first time in employer-sponsored retirement accounts		
Increased the percentage of pay contributed to retirement accounts		

Bank & Credit Union Partnerships

10. Did you work with a bank or credit union for America Saves Week 2017?

Yes

No

We are a bank or credit union

11. For America Saves Week 2017, the banks or credit unions we worked with did the following (please select all that apply):

Promoted use of automatic savings	Yes/No
Encouraged customers to take the America Saves Pledge	Yes/No
Provided incentivized savings accounts	Yes/No
Promoted use of direct deposit	Yes/No
None of the above	Yes/No

Additional Questions for Some Types of Organizations

12. Please categorize your organization:

- a. Cooperative Extension or Local Saves Campaign Coordinator (go to Q. 13)
- b. Bank (go to Q. 17)
- c. Credit Union (go to Q. 17)
- d. Other for-profit company providing a retirement plan (go to Q. 26)
- e. None of the above (go to Q. 28)

Questions for Cooperative Extension and Local Saves Campaigns

13. The questions on this page meet reporting requirements for Cooperative Extension agencies and other organizations serving as Local Saves Campaign coordinators.

Please indicate the scope of your report	Entire state/ Individual county or region
--	---

14. Please summarize participant activity (numbers only -- no \$, commas, or decimals):

	Internal Goal	Actual Reach
Number of participants who increased their knowledge of personal savings		
Number of participants who set a savings goal or took the Pledge		
Total amount of monthly savings pledged (in dollars)		

15. Please enter brief bullets of America Saves Week program highlights:

--

Cooperative Extension and Local Saves Campaigns go to Q. 27

Questions for Financial Institutions

16. Please indicate your preference regarding the America Saves Designation of Excellence:

- _____ Yes, I would like to complete the Application for Bank/Credit Union Recognition now
 _____ No, I do NOT want to complete the Application for Recognition at this time

(Questions 17 – 19 provide additional options regarding the application.)

20. Which of the following did you offer during America Saves Week? (Please select all that apply.)

Gifts or bonus incentives for opening accounts	Yes/No
Gifts or bonus incentives for adding to accounts	Yes/No
Special interest rates for opening accounts	Yes/No
Prizes or drawings	Yes/No
Outreach to Bank-At-Work customers	Yes/No
Outreach to Select Employee Groups (SEGs)	Yes/No
Financial education seminars	Yes/No
None	
Other (please specify)	

21. How many branches had activity that is included in this report?

22. How would you describe account activity during America Saves Week compared to your normal level of activity? (Please select all that apply.)

Higher number of savings accounts (or similar) opened	Yes/No
Greater deposits to existing savings accounts	Yes/No
No noticeable change in savings activity	Yes/No
Do not know	

23. It would be very helpful if you could provide your best estimates. We will use these to summarize activity associated with the Week.

Number of savers opening new accounts	
Dollars saved in new accounts	
Number of savers adding to existing accounts	
Additional dollars saved in existing accounts	

24. How did you promote automatic savings during America Saves Week 2017? (Check all that apply.)

Did not promote automatic savings
 At branches
 Online
 In workplaces
 Other (please specify): _____

Financial Institutions go to Q.27

Questions for Retirement Plan Sponsors

25. Which of the following did you utilize for your employees? (Please select all that apply.)

Retirement seminar by service provider	Yes/No
Financial education workshop or fair	Yes/No

E-mail communications	Yes/No
Postal mailings	Yes/No
Payroll stuffers	Yes/No
Web promotion	Yes/No
Social media (Facebook, Twitter, etc.)	Yes/No
Other (please specify)	

26. How many employees did you reach?

Additional Information/Stories

27. We like to feature stories that show the impact of your work during America Saves Week. Please share in the space below your America Saves Week story or success that illustrates the impact of your work:

Feedback

28. How did you hear about America Saves Week?

29. Do you have any follow-up activities planned for the remainder of the year?

Yes No

If yes, please briefly describe your plans

30. Do you have a suggestion for materials, activities, etc. for America Saves Week 2018?

31. Are there things we can do to better support your planning for America Saves Week (such as materials or activities)?