

America/Military Saves Week 2019 Reporting Survey

We are thrilled you were part of America/Military Saves Week. Please share with us your activities, accomplishments, and suggestions for improvement by completing this short survey. We will include your information in a report that is shared with all participants.

* 1. Organization name:

* 2. Who can we contact for more information?

Contact name:

Contact state:

Contact email:

Contact phone:

* 3. Which initiative(s) did you participate in this year?

- America Saves Week
- Military Saves Week
- Other (e.g. Wisconsin Saves Week)

* 4. Which of these descriptions best fits your organization?

- | | |
|--|--|
| <input type="radio"/> Academic institution | <input type="radio"/> Government agency |
| <input type="radio"/> Bank | <input type="radio"/> Local campaign (e.g. Alaska Saves) |
| <input type="radio"/> Business | <input type="radio"/> Military installation |
| <input type="radio"/> Credit union | <input type="radio"/> Non-profit organization |
| <input type="radio"/> Cooperative extension | |
| <input type="radio"/> Other (please specify) | |

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* 5. With which audiences did you communicate? *Select all that apply.*

- Employees
- Clients
- Customers
- Students
- Lower-income households
- Millennials
- Older Americans
- Service members and their families
- Veterans
- Youth
- Other (please specify)

* 6. Briefly describe how your organization participated in America/Military Saves Week 2019.

* 7. About how many individuals did you communicate with and try to engage?

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* 8. Which methods of communication and engagement did you use? *Select all that apply.*

- Social media (Facebook, Twitter, etc.)
- Website
- Tax site outreach
- Community events
- Posters / flyers
- E-mails / E-newsletters
- Print publications
- Press release
- Press conference
- Postal mailings
- Financial counseling / workshops
- Broadcast appearances
- Public service announcements
- Paid or donated advertising
- Signs/billboards
- Other (please specify)

* 9. Did you encourage individuals to participate in the #ImSavingForSweepstakes or complete the America Saves pledge (or similar, e.g. Los Angeles Saves Pledge)?

- Yes
- No

* 10. Do you have any follow-up activities (such as pledge drives, webinars, saver communications, etc.) planned for the remainder of the year?

- Yes
- No

If yes, please briefly describe your plans

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* 11. Would you like someone from America Saves or Military Saves to follow up with you about how we can partner together throughout the year?

Yes

No

* 12. Did you observe any improvements in personal saving? Please share in the space below your America/Military Saves Week story or success that illustrates the impact of your work:

Upload any images, graphics, or promotional materials you would like to share with the America/Military Saves Week staff. Please contact save@americasaves.org if you are having any trouble uploading materials.

13. Upload #1:

Choose File

No file chosen

14. Upload #2:

Choose File

No file chosen

15. Upload #3:

Choose File

No file chosen

16. Please describe how you used our materials to motivate your community to save.

17. How could our provided materials be improved for America/Military Saves Week 2020?

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18. Do you have any other suggestions on how we can make America/Military Saves Week 2020 even better?

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Workplace Financial Wellness

We have a few additional questions to ask about your role participating in America/Military Saves Week as an employer.

* 19. How many employees did you communicate with about America/Military Saves Week?

20. How many employees took these actions during America/Military Saves Week?

Started using split direct deposit to save a portion of their pay?

Increased the portion of split direct deposit into a separate savings account?

Enrolled for the first time in your employer-sponsored retirement accounts?

Increased the percentage of pay contributed to your employer-sponsored retirement accounts?

* 21. Which of the following did you utilize for your employees? *Please select all that apply.*

- Retirement seminar by service provider
- Financial education workshop or fair
- E-mail communications
- Postal mailings
- Payroll staffers
- Web promotion
- Social media (Facebook, Twitter, etc.)

If other, please specify:

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Cooperative Extension Reporting

The questions on this page meet reporting requirements for Cooperative Extension agencies and other organizations serving as local America Saves campaigns.

* 22. Summarize your outreach to savers.

Number of individuals/savers who increased their knowledge of personal savings:

Number of individuals/savers who set a savings goal or took the Pledge:

Total amount of monthly savings pledged (in dollars):

* 23. Please enter brief bullets of America/Military Saves Week program highlights for us to share with our Cooperative Extension partners:

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Local Campaign Reporting

We have a few additional questions to ask about your role participating in America/Military Saves Week as a local campaign.

24. What was the time period of your America/Military Saves Week engagement?

- America/Military Saves week (February 25-March 2, 2019)
- Month of February
- Other (please specify)

25. How many savers completed your local campaign pledge?

* 26. Please enter brief bullets of America/Military Saves Week program highlights to feature the great work of organizations that lead local campaigns in the AS/MS annual report.

If you need a report of your America/Military Saves Week saver data, please contact Lindsay at lferguson@consumerfed.org.

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Bank reporting

We have a few additional questions to ask about your role participating in America/Military Saves Week as a bank

* 27. Which of the following did you offer during America/Military Saves Week? *Select all that apply.*

- Gifts or bonus incentives for opening accounts
- Gifts or bonus incentives for adding to accounts
- Special interest rates for opening accounts
- Prizes or drawings
- Outreach to Bank-At-Work customers
- Financial education seminars
- Other
- None

If other, please specify:

* 28. How many branches had activity included in this report?

* 29. How would you describe account activity during America/Military Saves Week compared to your normal level of activity? *Select all that apply.*

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

Credit Union reporting

We have a few additional questions to ask about your role participating in America/Military Saves Week as a credit union

* 30. Which of the following did you offer during America/Military Saves Week?
(please select all that apply)

- Gifts or bonus incentives for opening accounts
- Gifts or bonus incentives for adding to accounts
- Special interest rates for opening accounts
- Prizes or drawings
- Outreach to Select Employee Groups (SEGs)
- Financial education seminars
- Other
- None

If other, please specify:

* 31. How many branches had activity included in this report?

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

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

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Military Installation Reporting

We have a few additional questions to ask about your role participating in America/Military Saves Week as a military installation.

* 33. Please select your service branch. *Select all that apply.*

- Army
- Navy
- Air Force
- Marines
- Coast Guard
- Air National Guard
- Army National Guard
- U.S. Department of Defense

* 34. How did you access the Military Saves materials and information for the Campaign Week promotion?
Please select all that apply.

- Directly from Military Saves personnel
- Through militarysaves.org
- From U.S. Department of Defense military channels
- From U.S. Department of Defense civilian channels
- From a military-affiliated bank or credit union
- Other (please specify)

* 35. Did you obtain a Commander's Proclamation for Military Saves Week?

- Yes
- No

* 36. Did your Installation Commander encourage participation through his/her channels, e-mail, Commanders Call, or another way?

- Yes
- No

* 37. Did you conduct a pledge drive to encourage individuals to take the Military Saves Pledge?

- Yes
- No

* 38. What was your Military Saves Week goal for the number of Military Saves Pledges (including repledges)?

- Under 100
- 100-250
- 250-500
- 500-1,000
- Over 1,000
- No goal

* 39. Which of the following did you use for reaching out to service members during Military Saves Week? *Please select all that apply.*

- Unit Commanders / enlisted leaders
- Units on the installation
- Tenant units
- Recruitment units
- Basic/technical schools
- Officer candidate courses
- First-term courses
- Additional courses
- Other organizations/associations

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* 40. Which of the following did you partner with on the installation for promotion and implementation of Military Saves Week events? *Please select all that apply.*

- Bank
- Bank Liaison Officer
- Public Affairs
- Credit Union
- Credit Union Liaison Officer
- Community Organizations

* 41. What is your estimate of the number of people you reached through financial fairs?

Service members

Civilians

Spouses

Dependents

* 42. What is your estimate of the number of people served through financial seminars or classes?

Service members

Civilians

Spouses

Dependents

* 43. What is your estimate of the number of people served through one-on-one counseling?

Service members

Civilians

Spouses

Dependents

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America Saves Designation of Savings Excellence

America Saves recognizes banks and credit unions that go above and beyond to motivate Americans to save during America/Military Saves Week. You can learn more about the Designation of Savings Excellence [here](#).

How designees are recognized:

- Recognition on americasaves.org and americasavesweek.org
- Recognition as a group in a national press release and individually in local releases
- Designation of Savings Excellence seal for your website
- Designation of Savings Excellence plaque

* 44. If eligible, are you interested in applying for the America Saves Designation of Savings Excellence?

- Yes, Designation of Savings Excellence for Banks
- Yes, Designation of Savings Excellence for Credit Unions
- No, not interested in applying
- Not eligible - Not a bank or credit union

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America Saves Designation of Savings Excellence for Banks Application

America Saves Week and Military Saves Week is an opportunity for individuals to take financial action and save money for emergencies, retirement, and everything in between.

America Saves understands the important role that banks play in helping families save money and build wealth. That's why we are recognizing exceptional banks that succeed in promoting savings or other wealth building accounts and have high levels of accounts opened or added to during America/Military Saves Week with our Designation of Savings Excellence. Last year, America Saves recognized 15 banks with the Designation of Savings Excellence.

A selection committee of industry and nonprofit leaders will meet this spring to review applications and select the winners. The committee is especially interested in recognizing banks that help their customers save automatically and use innovative strategies to promote these accounts.

Please note that only banks, not individual branches, are eligible.

Awards will be made based on the information provided through this application only.

* 45. Bank name:

* 46. What is the time period for your America/Military Saves Week promotion?

- America/Military Saves Week (February 25 - March 2, 2019)
- Month of February (2/1 - 2/28)
- Other (please specify)

* 47. How many branches participated in America/Military Saves Week?

* 48. What is the service area of the branches that participated in America/Military Saves Week (city, state or states)?

* 49. What is the total number of branches in the bank's footprint?

* 50. What is the service area of the bank (city, state or states)?

* 51. What is the asset size of your bank?

Please provide as much of the following information as you can about increased savings account activity related to your participation in America/Military Saves Week. Your activity will be compared to other banks of similar asset size.

* 52. What was the account activity during the promotion time you identified in question 8? Insert round numbers only. Do not use decimals or symbols (\$).

What is the total number of customers that opened new savings accounts during the promotion period?

- What is the aggregate amount deposited into those new savings accounts during the promotion period?

What is the total number of customers who added to existing savings accounts during the promotion period?

- What is the aggregate amount added to the balance of those old savings accounts during the promotion period?

What is the total number of customers who set up automatic saving during the promotion period?

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* 53. How does the savings activity reported here compare to other months? Please share month to month, year to year, or other comparable numbers, if available.

* 54. Describe any account-related incentives to save (or save automatically) such as higher rates, bonuses, prizes, or gifts that are related to America/Military Saves Week.

Describe the three most important activities undertaken by your bank to promote personal saving related to the America/Military Saves Week promotion.

Please include one example of how you promoted automatic savings. Methods commonly used for promotion and outreach include:

- Published press releases and press events
- Broadcast programs/appearances
- Public service announcements
- Paid or donated advertising
- One-on-one financial counseling
- Financial education workshops
- Reached out to business customers to encourage employees to save
- Information provided via website
- Social media (Facebook, Twitter, Pinterest, etc.)
- Internal/external publications
- Community events
- Posters/flyers
- Signs/billboards
- Postal mailings or e-mails

55. Example #1

56. Example #2

57. Example #3

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* 58. Please describe how you used innovation to encourage more individuals to save during America and/or Military Saves Week.

* 59. Please provide information about any efforts, especially those related to Roth IRAs, to promote retirement saving among low- and middle-income customers.

* 60. In addition to America/Military Saves Week, were you engaged in America/Military Saves promotions throughout the year?

Upload up to three promotional materials you would like to share with the selection committee. Please contact save@americasaves.org if you are having trouble uploading materials.

61. Promotional material #1:

Choose File

No file chosen

62. Promotional material #2:

Choose File

No file chosen

63. Promotional material #3:

Choose File

No file chosen

Thank you for completing the application for the America Saves Designation of Savings Excellence for Banks. The selection committee will meet in spring to select winners. You will be contacted about your application at that time. If you have any questions in the meantime, please contact George Barany at gbarany@consumerfed.org.

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America Saves Designation of Savings Excellence for Credit Unions Application

Credit unions of all sizes, regardless of asset size or number of branches, play a significant role in encouraging and supporting individuals to save money during America Saves Week and Military Saves Week (February 25 - March 2, 2019). By encouraging members to save automatically, offering low opening balances and no fee savings accounts, and incentivizing and marketing products, credit unions help people build wealth.

America Saves understands the important role that credit unions play in helping families save money and build wealth. That's why we are recognizing credit unions that go above and beyond to encourage people to save with our Designation of Savings Excellence. Last year, America Saves recognized 17 credit unions with the Designation of Savings Excellence.

A selection committee of credit union and America Saves leaders will meet this spring to review applications and select those to receive recognition. Please keep in mind the committee is interested in recognizing credit unions of all sizes that help their members save, and especially to save automatically.

This is an organizational designation and should be considered as representing the entire footprint of the credit union, not individual branch efforts.

Awards will be made based on the information provided through this application only.

* 64. What is the asset size of your credit union?

* 65. How many members do you have?

* 66. Over what time period were your America/Military Saves Week promotions?

- America/Military Saves Week (February 25 - March 2, 2019)
- Month of February
- Other (please specify)

* 67. What is your field of membership?

* 68. What is the total number of branches and service facilities?

* 69. How many branches and service facilities participated in America Saves Week/Military Saves Week?

Enter amounts for the activity of accounts during the promotion time. Your activity will be compared to other credit unions of similar asset size.

* 70. What was the account activity during the promotion time you identified in question 8? Insert round numbers only. Do not use decimals or symbols (\$).

What is the total number of members that opened new savings accounts during the promotion period?

- What is the aggregate amount deposited into those new savings accounts during the promotion period?

What is the total number of members who added to existing savings accounts during the promotion period?

- What is the aggregate amount added to the balance of those old savings accounts during the promotion period?

What is the total number of members who set up automatic saving during the promotion period?

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* 71. How does the savings activity reported here compare to other months? Please share month to month, year to year, or other comparable numbers, if available.

* 72. Describe any account-related incentives to save (or save automatically) such as higher rates, bonuses, prizes, or gifts that are related to America/Military Saves Week.

Describe the three most important activities undertaken by your credit union to promote personal saving during America/Military Saves Week that are related to the America/Military Saves Week promotion.

Please include one example of how you promoted automatic savings. Methods commonly used for promotion and outreach include:

- Published press releases and press events
- Broadcast programs/appearances
- Public service announcements
- Paid or donated advertising
- One-on-one financial counseling
- Financial education workshops
- Reached out to business customers to encourage employees to save
- Information provided via website
- Social media (Facebook, Twitter, Pinterest, etc.)
- Internal/external publications
- Community events
- Posters/flyers
- Signs/billboards
- Postal mailings or e-mails

73. Example #1:

74. Example #2:

75. Example #3:

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* 76. Please describe how you used innovation to encourage more individuals to save during America and/or Military Saves Week.

* 77. Please provide information about any efforts related to the promotion of retirement saving among low- and middle-income members.

* 78. If you engaged in America/Military Saves promotions throughout the year, please briefly describe.

79. Is there anything you want to add regarding your participation in America Saves Week/Military Saves Week?

Upload up to three promotional materials you would like to share with the selection committee. Please contact save@americasaves.org if you are having trouble uploading materials.

80. Promotional material #1:

No file chosen

81. Promotional material #2:

No file chosen

82. Promotional material #3:

No file chosen

Thank you for completing the application for the America Saves Designation of Savings Excellence for Credit Unions. The selection committee will meet this spring to select winners. You will be contacted about your application at that time. If you have any questions in the meantime, please contact George Barany at gbarany@consumerfed.org.

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Report Finished

You have completed the America/Military Saves Week reporting survey.

Thank you for your hard work this year and for taking the time to tell us about it! Please expect to receive our report.

Together, we are creating a nationwide community of savers.

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