

Welcome

**THANK YOU for completing the America Saves Week 2020 Reporting Survey! The information collected in this survey helps to measure and report on the impact of the Week. We appreciate you taking the time to complete the survey.**

**Also included in the survey is the application for the Designation of Savings Excellence (DOSE) for banks and credit unions that participate in America Saves Week 2020. To be considered for the DOSE, your financial institution needs to opt-in in the appropriate section and answer all the questions completely.**

**You are able to open the Reporting Survey at any time, pause your work and return to complete it at a later date. Please be sure to answer all questions fully and accurately.**

**The America Saves Week 2020 Reporting Survey closes on Monday, MARCH 23, 2020**

\* 1. First Name

\* 2. Last Name

\* 3. Title

\* 4. Email

\* 5. Phone Number

\* 6. State

\* 7. Zip

## Organization Information

\* 8. Organization Name

\* 9. 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 (i.e. Alaska Saves) |
| <input type="radio"/> Business or Corporation | <input type="radio"/> Media/Blogger                      |
| <input type="radio"/> Cooperative Extension   | <input type="radio"/> Military Installation              |
| <input type="radio"/> Credit Union            | <input type="radio"/> Nonprofit Organization             |
| <input type="radio"/> Other (please specify)  |  |

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\* 10. During America Saves Week how many total individuals did you reach?

\* 11. Do you plan to promote saving throughout the remainder of 2020?

Yes

No

\* 12. Were your employees the primary or sole target for your America Saves Week outreach?

Yes

No

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## Employer Questions

\* 13. How many employees did you communicate with during America Saves Week?

\* 14. About how many employees does your organization have?

- 1-50  250-500  
 50-100  500+  
 100-250

\* 15. What actions did you encourage your employees to take during ASW? (Choose all that apply)

- Make a deposition into a new or existing savings account  Enroll in the employer-sponsored retirement plan  
 Use split deposit to save a portion of their pay into a savings account outside of a retirement account  Increase the amount of pay contributed to their employer-provided retirement account  
 If already using split deposit, increase the portion of their pay that is split into a separate savings account outside of a retirement account  
 Other (please specify)

\* 16. What automatic saving action did you see most adopted among your employees as a result of your America Saves Week efforts?

- Began using split deposit to save a portion of their pay into a savings account outside of a retirement account  
 If already using split deposit, increased the portion of their pay that is split into a separate savings account outside of a retirement account  
 Enrolled in the employer-sponsored retirement plan  
 Increased the amount of pay being contributed into their employer-provided retirement account  
 Other (please specify)

\* 17. Did you encourage individuals to take the America Saves Pledge?

- Yes
- No

\* 18. Did you encourage individuals to save automatically either at work or through their financial institution?

- Yes
- No

\* 19. What other actions did you encourage individuals to take? (check all that apply)

- |   |   |
|---|---|
| <input type="checkbox"/> Open a bank account    | <input type="checkbox"/> Save for emergencies or unexpected expenses            |
| <input type="checkbox"/> Make a budget          | <input type="checkbox"/> Participate in an employer provided retirement account |
| <input type="checkbox"/> Pay off debt           | <input type="checkbox"/> Increase contribution to a 401(k), 403(b) or IRA       |
| <input type="checkbox"/> Other (please specify) |   |

\* 20. In promoting saving during America Saves Week, what was the most frequently cited barrier to saving you heard from your audience?

- |   |  |
|---|--|
| <input type="radio"/> Don't earn enough money to save | <input type="radio"/> Don't have a savings account |
| <input type="radio"/> Have too much debt              | <input type="radio"/> Didn't receive any responses |
| <input type="radio"/> Don't know how to save          |  |
| <input type="radio"/> Other (please specify)          |  |

## Banks

America Saves Week provides financial institutions with an opportunity to encourage new and existing customers to save effectively and automatically in safe, appropriate and affordable accounts. America Saves awards the Designation of Savings Excellence to banks that succeed in promoting savings or other wealth building accounts and show an increase in the number of accounts opened or added to during the Week. An institution can earn the Designation by providing quantitative and qualitative information with detailed answers to all of the application's questions. A selection committee of industry leaders chooses the honorees based on information collected in these questions and in relation to the size of each institution's business and specific efforts. In order to be considered for the Designation, all questions on the application must be answered fully. The committee will not consider incomplete applications. We encourage all banks to apply for the Designation so they can be recognized for their efforts in helping Americans save.

\* 21. Do you want to be considered for the Designation award?

Yes

No

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\* 22. What is the total number of branches in the bank's footprint?

\* 22. What is the service area of the bank? (city, state, or states)

\* 23. What is the asset size of your bank?

\* 24. How many branches participated in America Saves Week 2020?

\* 25. Did your entire bank's service area participate in America Saves Week 2020?

Yes

No

26. If NO, what parts of your service area participated in America Saves Week 2020? (cities, state or states)

\* 27. Which of the following did you offer during America Saves Week 2020? (Check all that apply)

Gifts or bonus incentives for opening accounts

Outreach to Bank-at-Work customers

Gifts or bonus incentives for depositing to existing accounts

Financial education workshops

Special interest rates for opening accounts

Other

Prizes or drawings

None

\* 28. Please provide details about any incentives offered during ASW 2020.

\* 29. What is the total number of customers who opened new savings accounts during America Saves Week 2020?

\* 30. What is the aggregate amount deposited into those new savings accounts during America Saves Week 2020?

\* 31. What is the total number of customers who added to existing savings accounts during America Saves Week 2020?

32. What is the aggregate amount added to the balances of those existing savings accounts during America Saves Week 2020?

33. What is the total number of customers who set up automatic savings through your financial institution during America Saves Week 2020?

\* 34. Please share numbers to show how your America Saves Week 2020 savings activity compares to the same activities in the week immediately prior (Feb 17 - Feb 22, 2020):

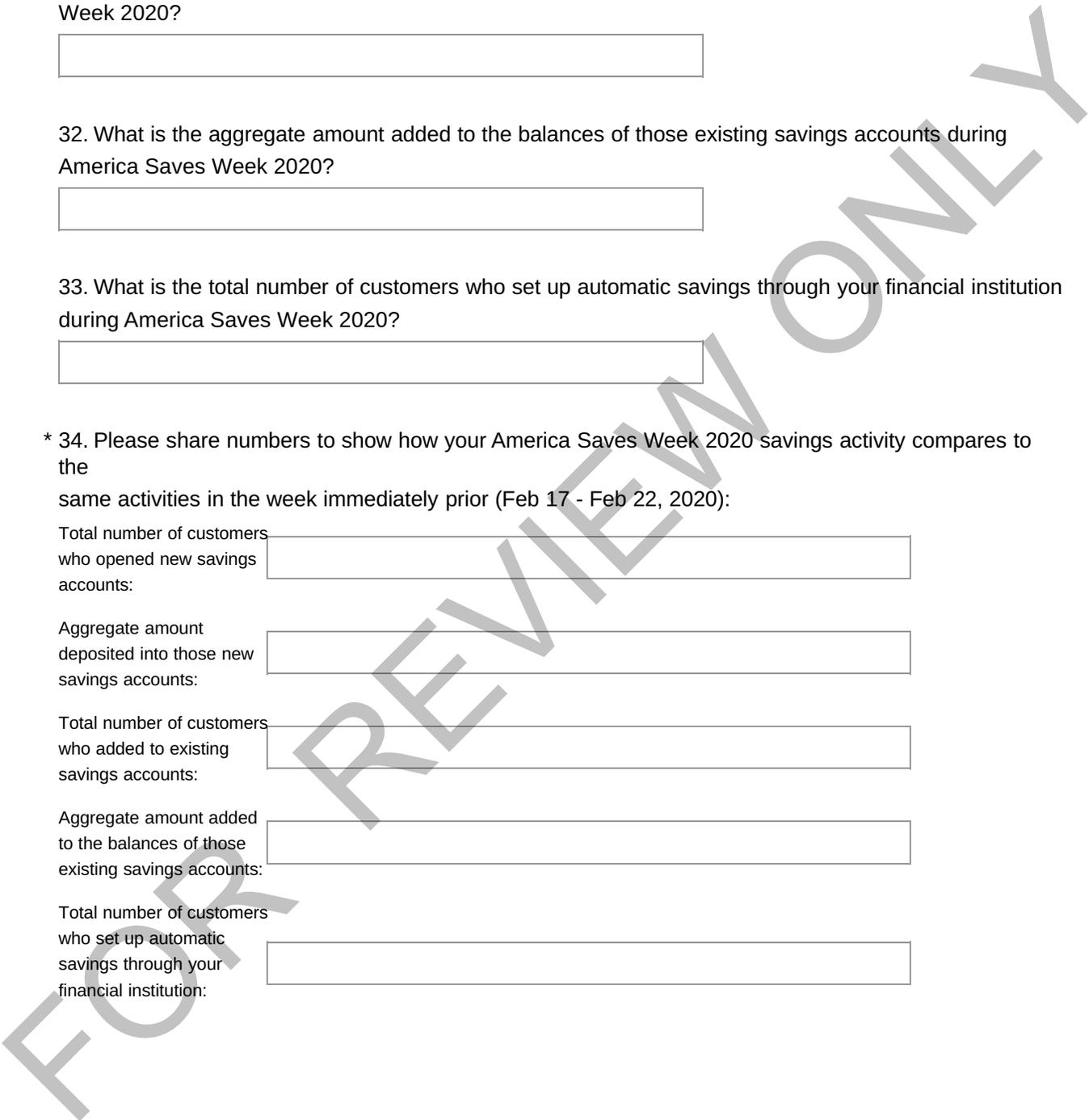
Total number of customers who opened new savings accounts:

Aggregate amount deposited into those new savings accounts:

Total number of customers who added to existing savings accounts:

Aggregate amount added to the balances of those existing savings accounts:

Total number of customers who set up automatic savings through your financial institution:



\* 35. Please share numbers to show how America Saves Week 2020 saving activity compares to the same savings activities during the previous America Saves Week (Feb 25 - March 2, 2019):

Total number of customers who opened new savings accounts:

Aggregate amount deposited into those new savings accounts:

Total number of customers who added to existing savings accounts:

Aggregate amount added to the balances of those existing savings accounts:

Total number of customers who set up automatic savings through your bank:

36. Did your bank try any new efforts to encourage savings during America Saves Week 2020?

- Yes
- No

37. If YES, please describe.

\* 38. Did your bank have any specific efforts to promote retirement savings among low- and middle- income households?

- Yes
- No

39. If YES, please describe.

\* 40. Describe up to three of the most important activities your bank used to promote personal savings during America Saves Week 2020?

Example 1

Example 2

Example 3

\* 41. Please share with us any photos, graphics or supplemental materials from ASW 2020 that you used to promote your activities for the Week. Upload them here.

[By submitting examples you are giving America Saves permission to use them on the America Saves website, social media, email newsletters and other communications.]

Choose File

No file chosen

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42. Please describe any specific activities such as communication strategies, promotional activities, or special events that your organization undertook that were particularly successful during America Saves Week 2020?

43. Please describe any specific challenges your organization experienced regarding America Saves Week 2020?

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