

## 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)

Open a bank account

Save for emergencies or unexpected expenses

Make a budget

Participate in an employer provided retirement account

Pay off debt

Increase contribution to a 401(k), 403(b) or IRA

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?

Don't earn enough money to save

Don't have a savings account

Have too much debt

Didn't receive any responses

Don't know how to save

Other (please specify)

## Credit Unions

**America Saves Week provides financial institutions with an opportunity to encourage new and existing members to save effectively and automatically in safe, appropriate and affordable accounts. America Saves awards the Designation of Savings Excellence to credit unions 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 credit unions 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

22. What is the total number of branches and service facilities in the credit union's footprint?

23. What is your field of membership and service area of your credit union?

Field of Membership

Service Area (city, state or states)

24. How many members does your credit union have?

25. What is the asset size of your credit union?

26. How many branches participated in America Saves Week 2020?

\* 27. Did your credit union's entire service area participate in America Saves Week 2020?

- Yes  
 No

28. If NO, what parts of your service area participated in America Saves Week 2020?

\* 29. Which of the following did you offer during America Saves Week 2020? (check all that apply)

- Gifts or bonus incentives for opening accounts  
 Gifts or bonus incentives for depositing to existing accounts  
 Special interest rates for opening accounts  
 Prizes or drawings  
 Outreach to business customers to encourage employees to save  
 Financial education workshops  
 Other  
 None

\* 30. Please provide details about any incentives your credit union used.

\* 31. What is the total number of members that opened new savings accounts during America Saves Week 2020?

\* 32. What is the aggregate amount deposited into those new savings accounts during America Saves Week 2020?

\* 33. What is the total number of members who added to existing savings accounts during America Saves Week 2020?

\* 34. What is the aggregate amount added to the balances of those existing savings accounts during America Saves Week 2020?

\* 35. What is the total number of members who set up automatic savings during America Saves Week 2020?

\* 36. 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 members who opened new savings accounts:

Aggregate amount deposited into those new savings accounts:

Total number of members who added to existing savings accounts:

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

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

\* 37. 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 members who opened new savings accounts:

Aggregate amount deposited into those new savings accounts:

Total number of members who added to existing savings accounts:

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

Total number of members who set up automatic savings through your credit union:

\* 38. Did your credit union try any new efforts to encourage savings during ASW 2020?

Yes

No

39. If YES, please describe.

\* 40. Did your credit union have any specific efforts to promote retirement savings among low- and middle-income households?

Yes

No

41. If YES, please describe.

42. Describe up to three of the most important activities your credit union used to promote personal savings during ASW?

Example 1

Example 2

Example 3

\* 43. 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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44. 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?

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

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