

2016 BOSTON TAX HELP COALITION
TAXPAYER DATA REPORT

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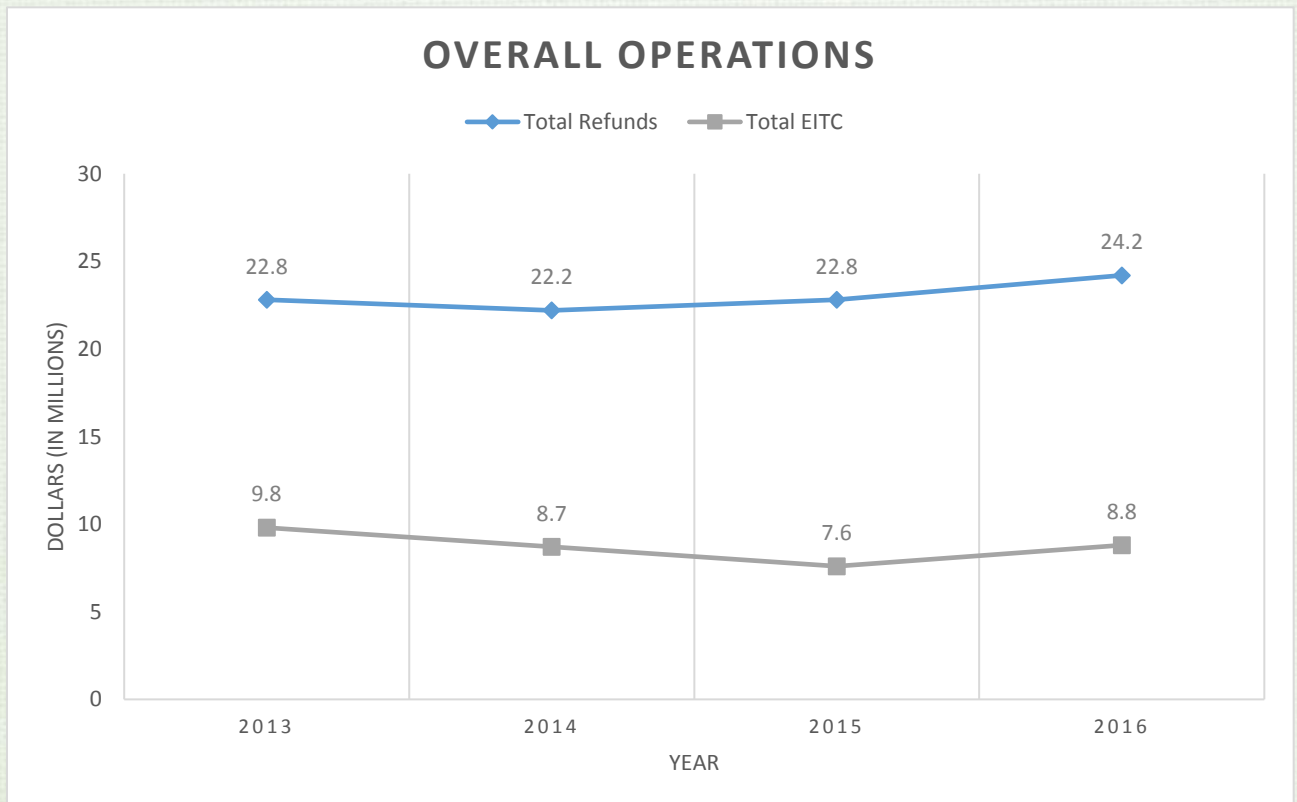
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Overall Operations (2016 results)

37 TAX PREPARATION SITE SERVING 12,843 TAXPAYERS

Quick Comparison: 2013-2016 Campaigns				
	2013	2014	2015	2016
Taxpayers Served	11,312	11,272	12,940	12,843
Total Refunds*	\$22.8m	\$22.2m	\$22.8m	\$24.5m
Total EITC*	\$9.8m	\$8.7m	\$7.6m	\$8.8m
Tax Prep Sites	25	26	27	37
Volunteers	320	314	325	372
Financial Checkup Participants	1,576	1,477	1,279	3,496



Taxpayer Data (2016 results)

REFUNDS AND CREDITS

Refunds		Credits	
Total Refunds		Total Earned Income Credits	
Total Combined Refunds	\$ 24,517,597.00	Total Combined EIC	\$ 8,794,763.00
Median Combined Refund	\$ 1,259.00	Median Combined EIC	\$ 1,101.70
Average Combined Refund	\$ 2,252.76	Average Combined EIC	\$ 1,970.15

Federal Refund Details		Federal Earned Income Credit Details	
Total Federal Refunds	\$ 20,210,800.00	Total Federal EIC	\$ 7,647,620.00
Median Federal Refund	\$ 1,027.00	Median Federal EIC	\$ 958.00
Average Federal Refund	\$ 1,932.75	Average Federal EIC	\$ 1,713.18

Massachusetts Refund Details		Massachusetts Earned Income Credit Details	
Total Massachusetts Refunds	\$ 4,306,797.00	Total Massachusetts EIC	\$ 1,147,143.00
Median Massachusetts Refund	\$ 303.00	Median Massachusetts EIC	\$ 143.70
Average Massachusetts Refund	\$ 407.37	Average Massachusetts EIC	\$ 256.98

Filing Status	Count
Single	7983
Married filing jointly	1106
Married filing separately	330
Head of Household	2835
Qualifying widower with dependent child	5

Other Credits		
	Average Credit	Total Credit
Elderly Credits	\$ 130.61	\$ 3,657.00
Child Care Credits	\$ 489.14	\$ 188,317.00
Child Tax Credits	\$ 871.91	\$ 1,043,672.00
Education Credits	\$ 1,118.61	\$ 1,017,936.00

Taxpayer Data (2016 results)

GEOGRAPHIC DISTRIBUTION

	Frequency	Percentage
DORCHESTER/CODMAN		11.13%
SQUARE	1430	
ROXBURY	1013	7.89%
ROXBURY/GROVE HALL	929	7.23%
MATTAPAN	750	5.84%
DORCHESTER/UPHAMS		5.81%
CORNER	746	
EAST BOSTON	571	4.45%
HYDE PARK	558	4.34%
SOUTH END	494	3.85%
ROSLINDALE	483	3.76%
DORCHESTER/FILEDS		3.64%
SQUARE	468	
JAMAICA PLAIN	425	3.31%
BRIGHTON	414	3.22%
SOUTH BOSTON	403	3.14%
ROXBURY CROSSING	326	2.54%
FENWAY	214	1.67%
ALLSTON	189	1.47%
CHARLESTOWN	149	1.16%
WEST ROXBURY	145	1.13%
BACK BAY	143	1.11%
QUINCY	130	1.01%
MALDEN	110	0.86%
RANDOLPH	109	0.85%
OTHERS	1404	10.93%
Total	12843	100.00%

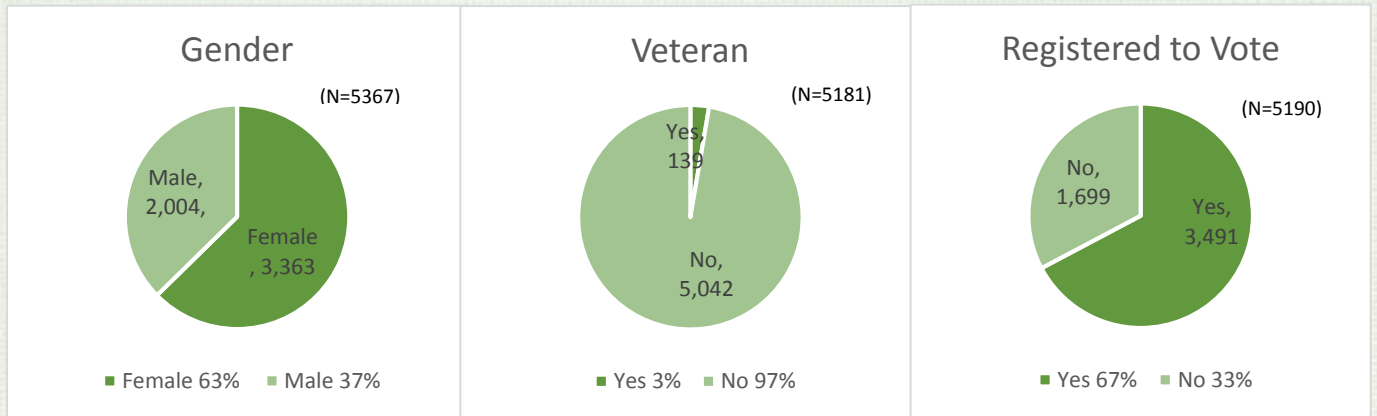
Taxpayer Data (2016 results)

TAX SITE DISTRIBUTION

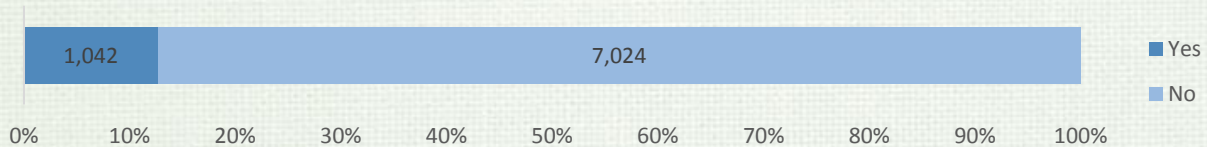
ABCD Tax Sites	Number	Percentage	Other Tax Sites	Number	Percent
ABCD Allston Brighton NOC	392	3.05%	1199 SEIU of Boston	1090	8.40%
ABCD Dorchester NSC	579	4.51%	Allston Brighton APAC	454	3.53%
ABCD East Boston APAC	480	3.74%	Allston Brighton Child and Family Services Center	109	0.85%
ABCD Roxbury/North Dorchester NOC	510	3.97%	Boston Chinatown Neighborhood Center	348	2.71%
ABCD Jamaica Plain APAC	380	2.96%	Codman Square Health Center	962	7.49%
ABCD Mattapan FSC	780	6.07%	DotHouse Health	1,193	9.29%
ABCD Parker Hill Fenway NSC	487	3.79%	StreetCrd at Boston Medical Center	188	1.46%
ABCD Robert M. Coard Building	629	4.90%	JVS Center for Economic Opportunity	483	3.76%
ABCD South End NSC	595	4.63%	Neighborhood of Affordable Housing	124	0.97%
ABCD South Boston Action CTR.	338	2.63%	BHA Charlestown Works	89	0.69%
ABCD South Side Head Start	454	3.53%	Roxbury Center for Financial Empowerment	1032	8.03%
ABCD Total	5618	43.74%	Suffolk University	134	1.04%
			Crittenton Women's Union	65	0.51%
			Urban Edge Housing Corporation	626	4.87%
			Myfreetaxes.com(Suffolk County)	322	2.51%
			Total	12,843	100.00%

Taxpayer Survey Data (Total 5668 Respondents)

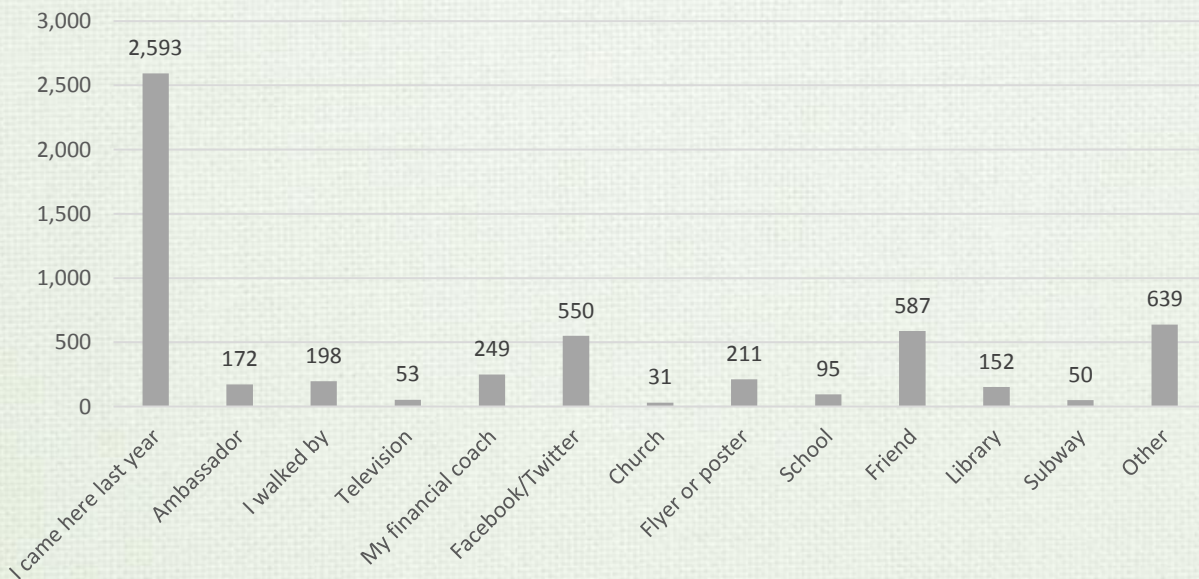
DEMOGRAPHICS



Do You or Any Member of Your Household Have A Disability? (N=8066)

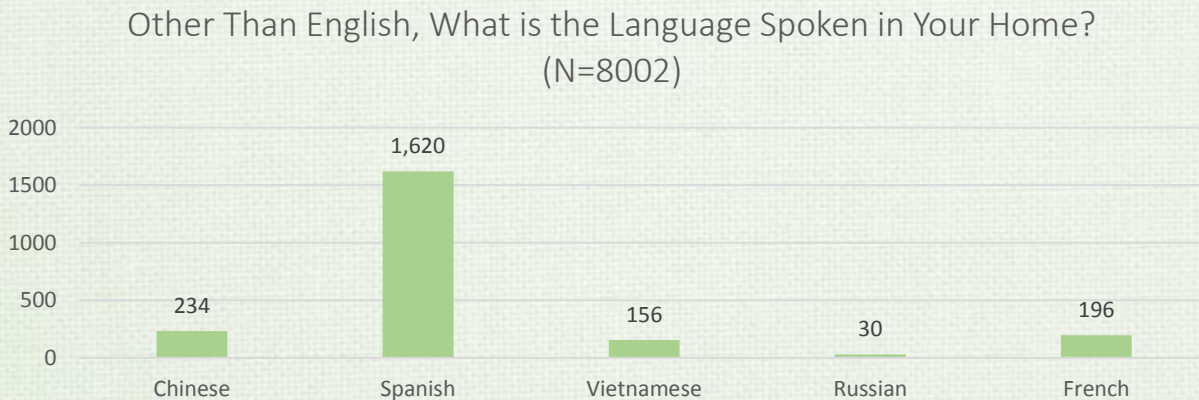
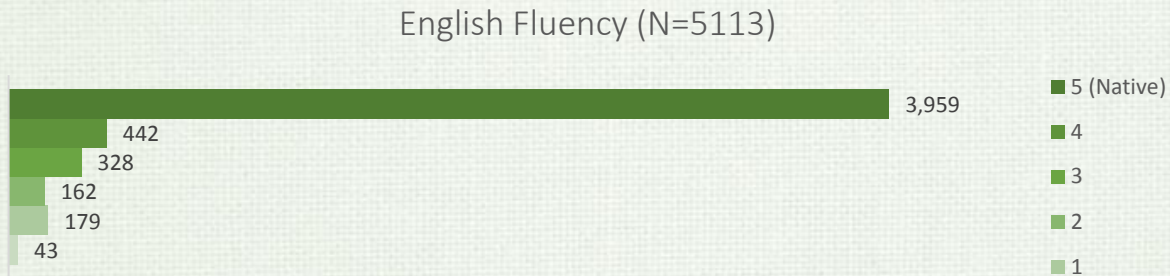
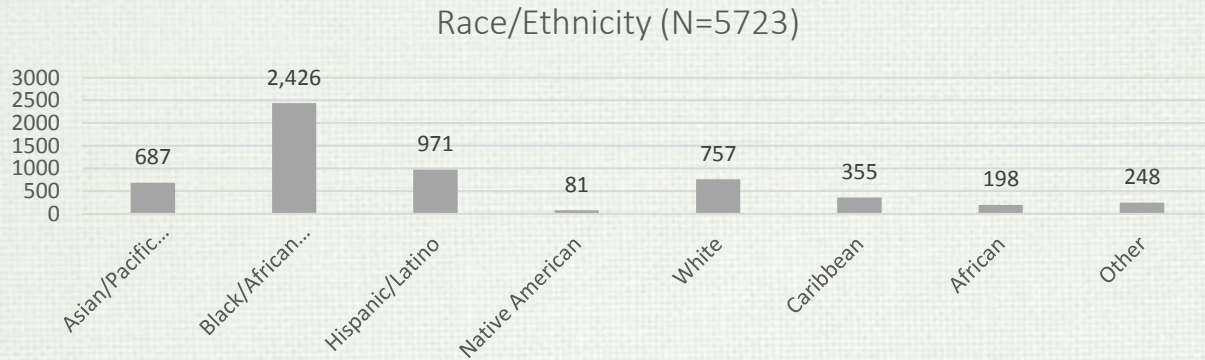


How did you hear about this free tax prep site? (N=5211)



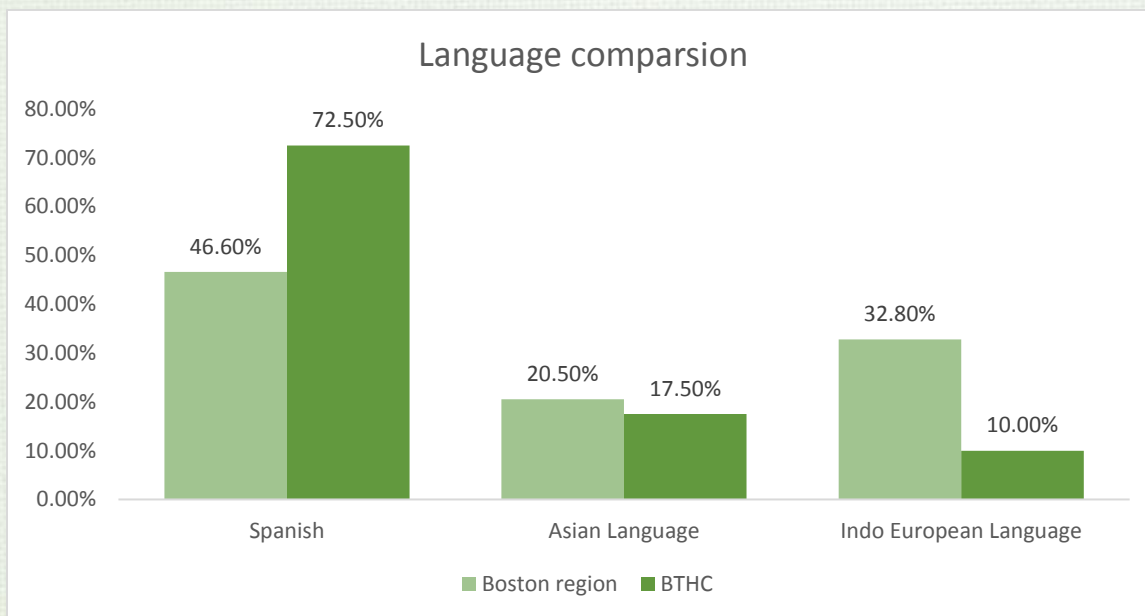
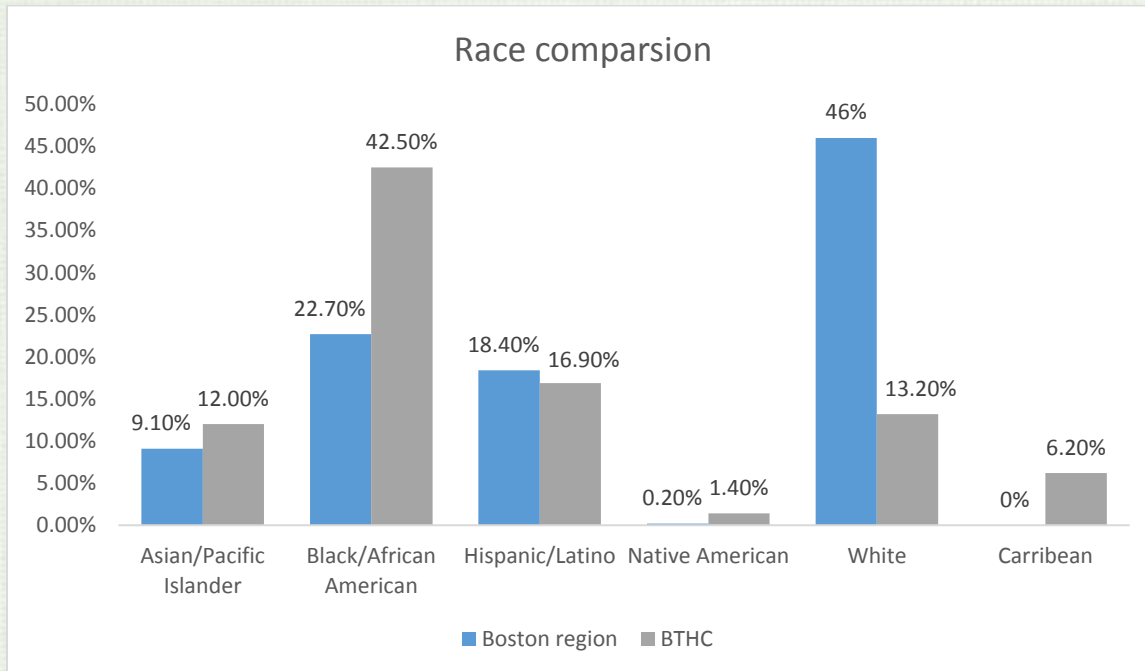
Taxpayer Survey Data (Total 5668 Respondents)

DEMOGRAPHICS



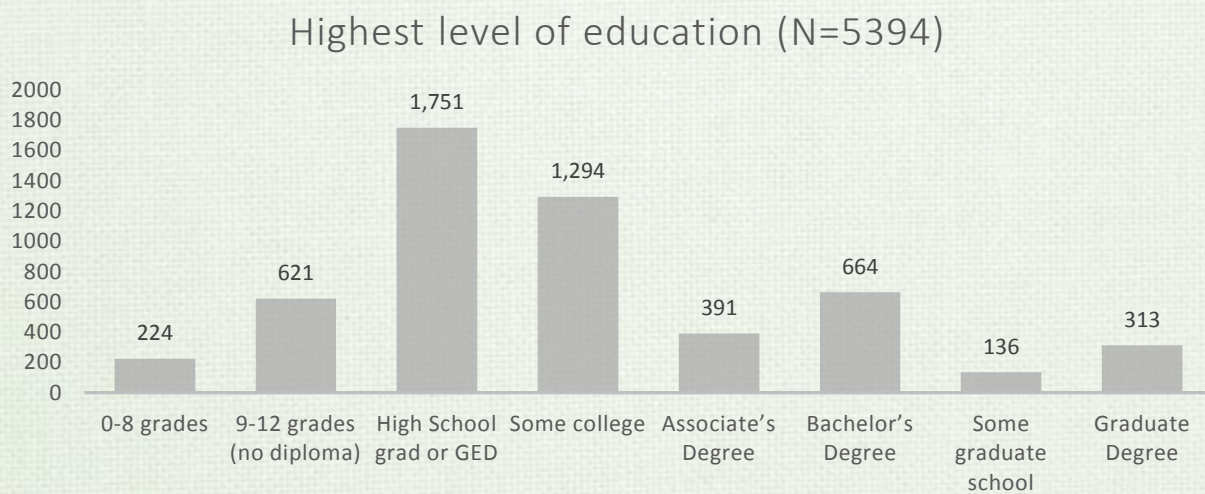
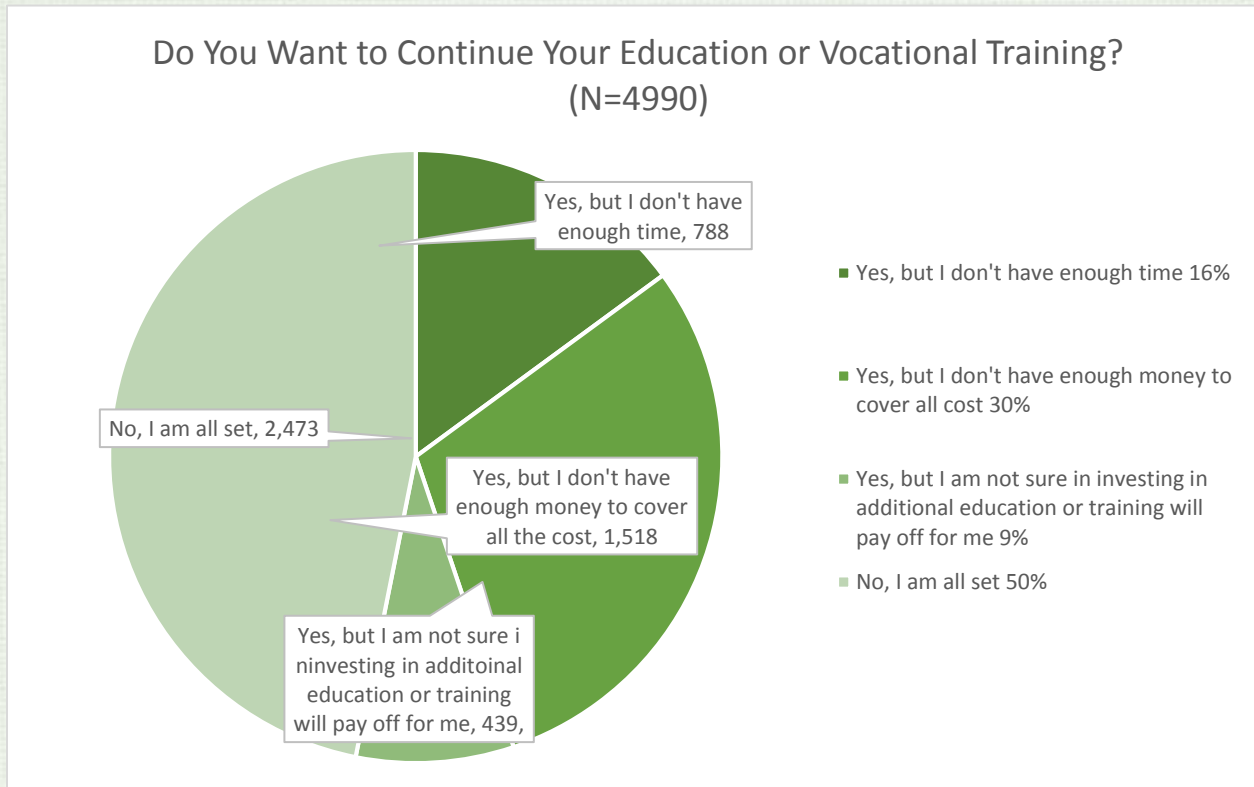
Comparison: BTHC and Boston Region

Race and Language



Taxpayer Survey Data (Total 5668 Respondents)

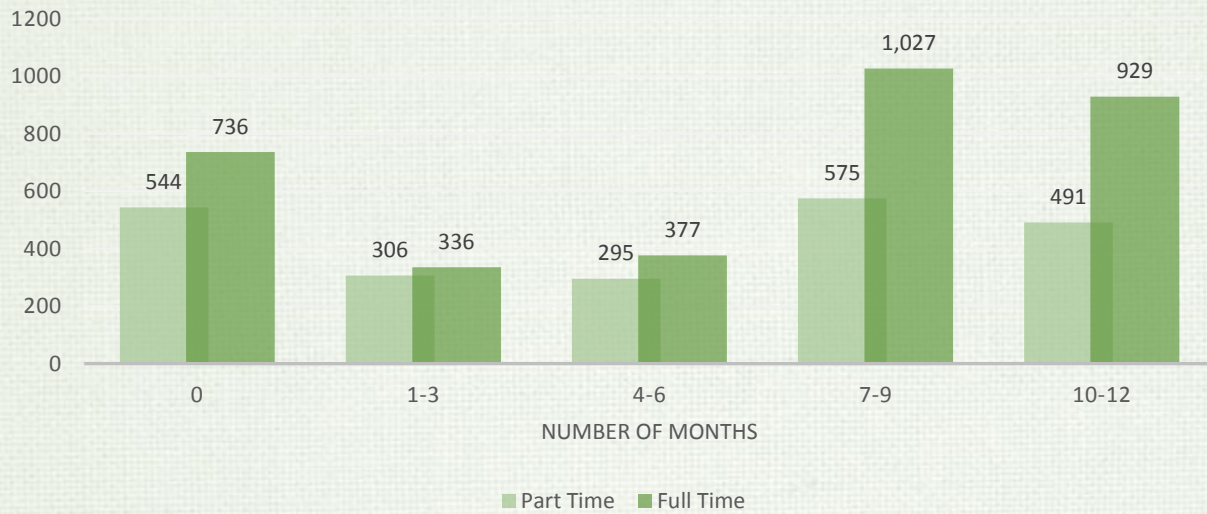
DEMOGRAPHICS



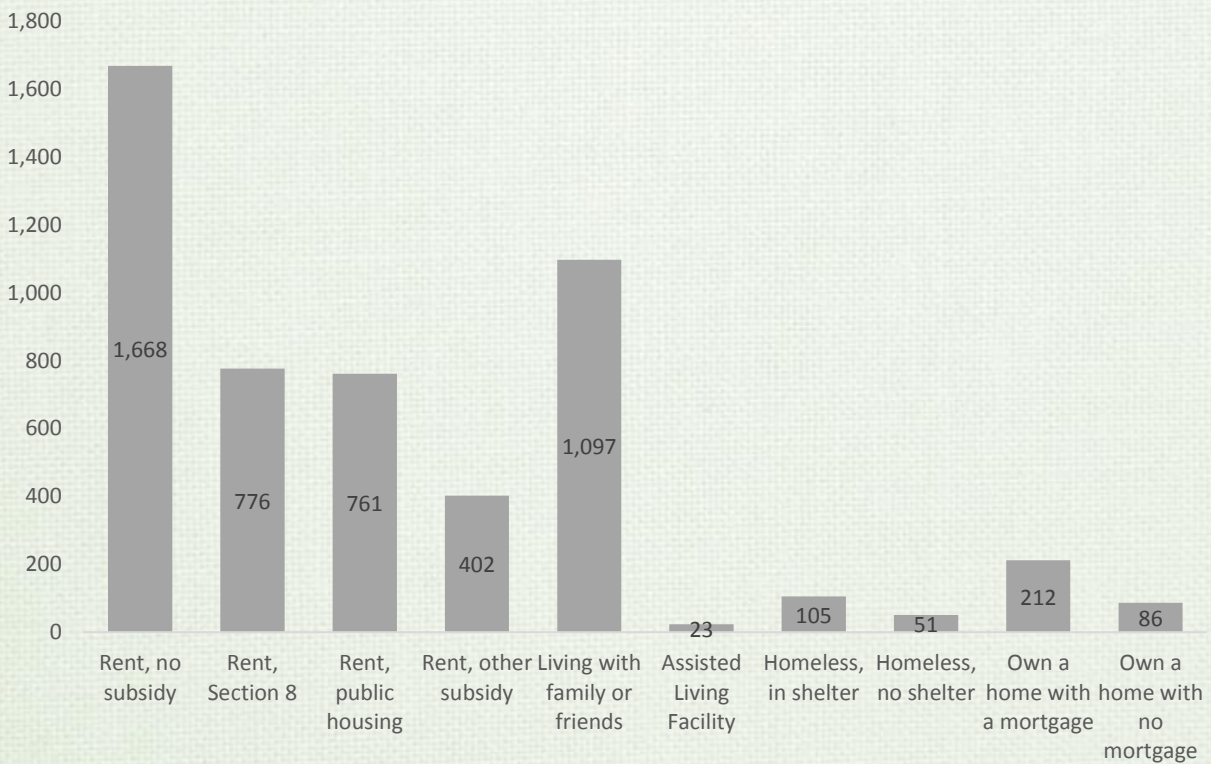
Taxpayer Survey Data

HOUSING, BENEFITS & EMPLOYMENT

How Many Months Were You Employed Last Year?
(part time N=2211, full time N=3405)

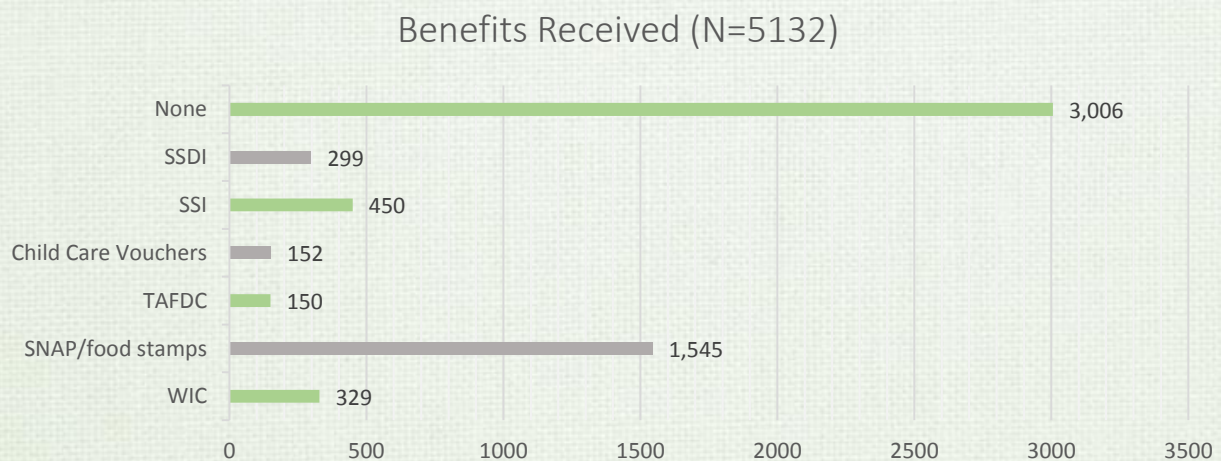
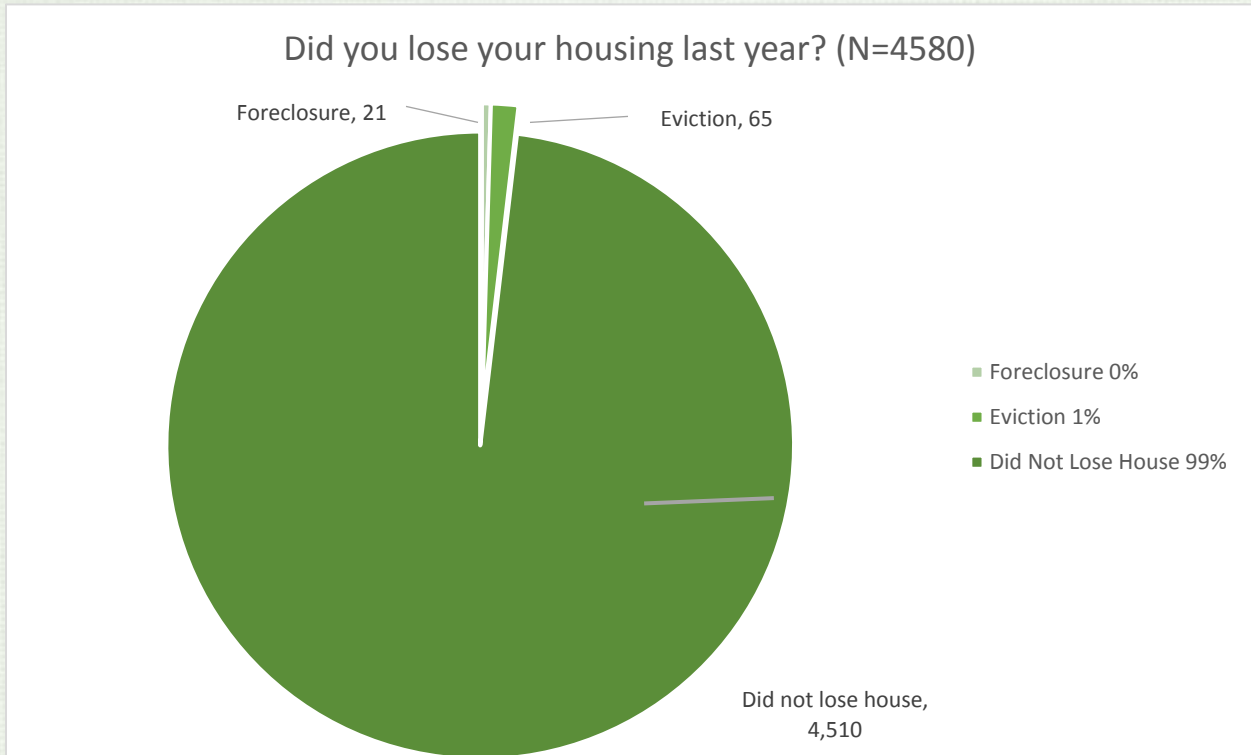


Housing Status (N=5181)



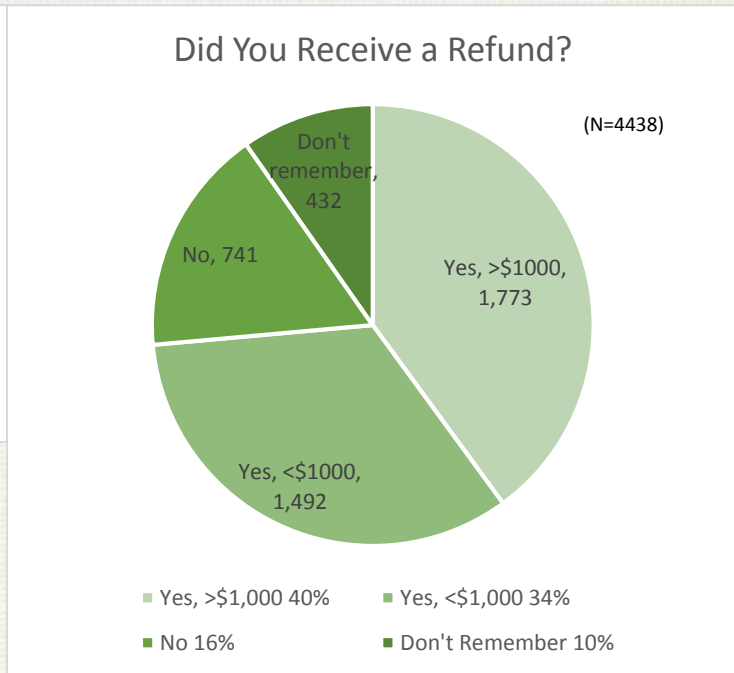
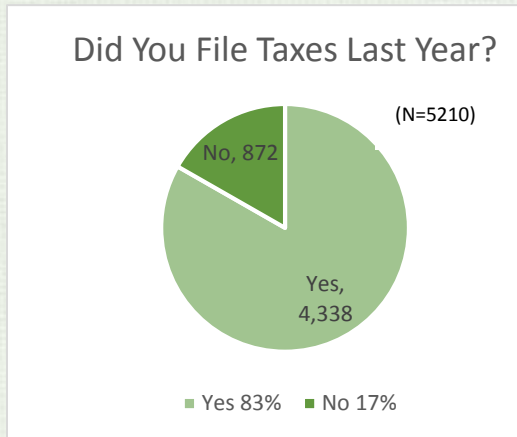
Taxpayer Survey Data

HOUSING, BENEFITS & EMPLOYMENT

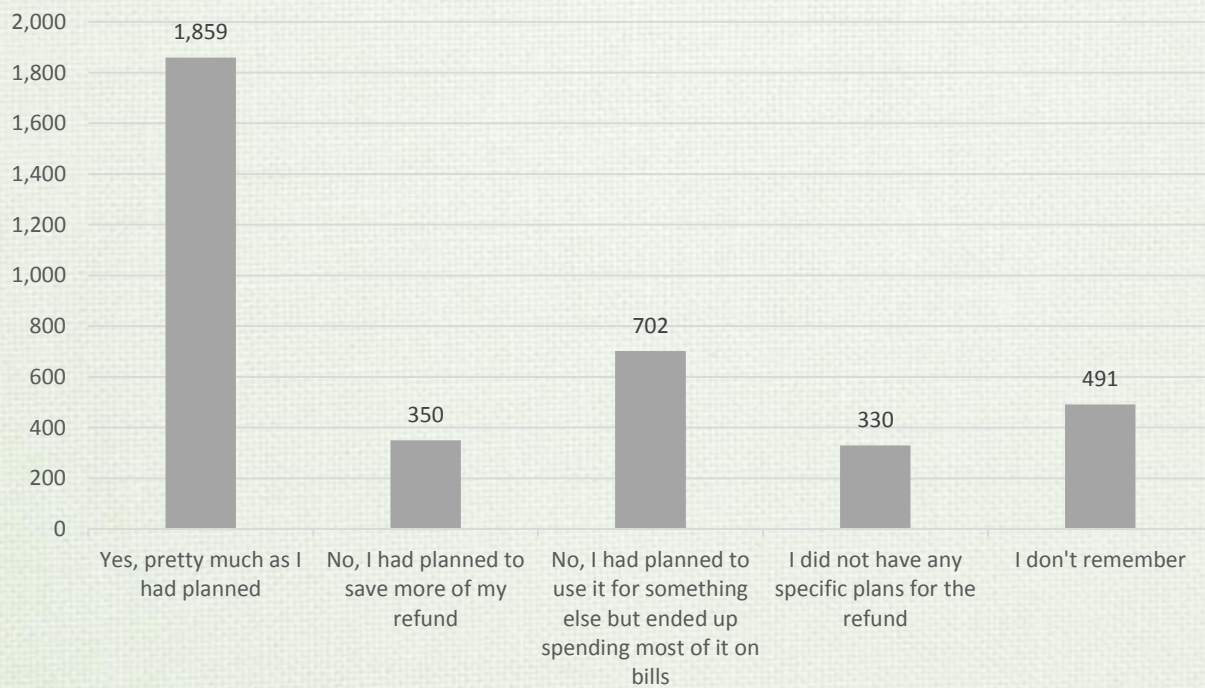


Taxpayer Survey Data

TAXES & REFUNDS



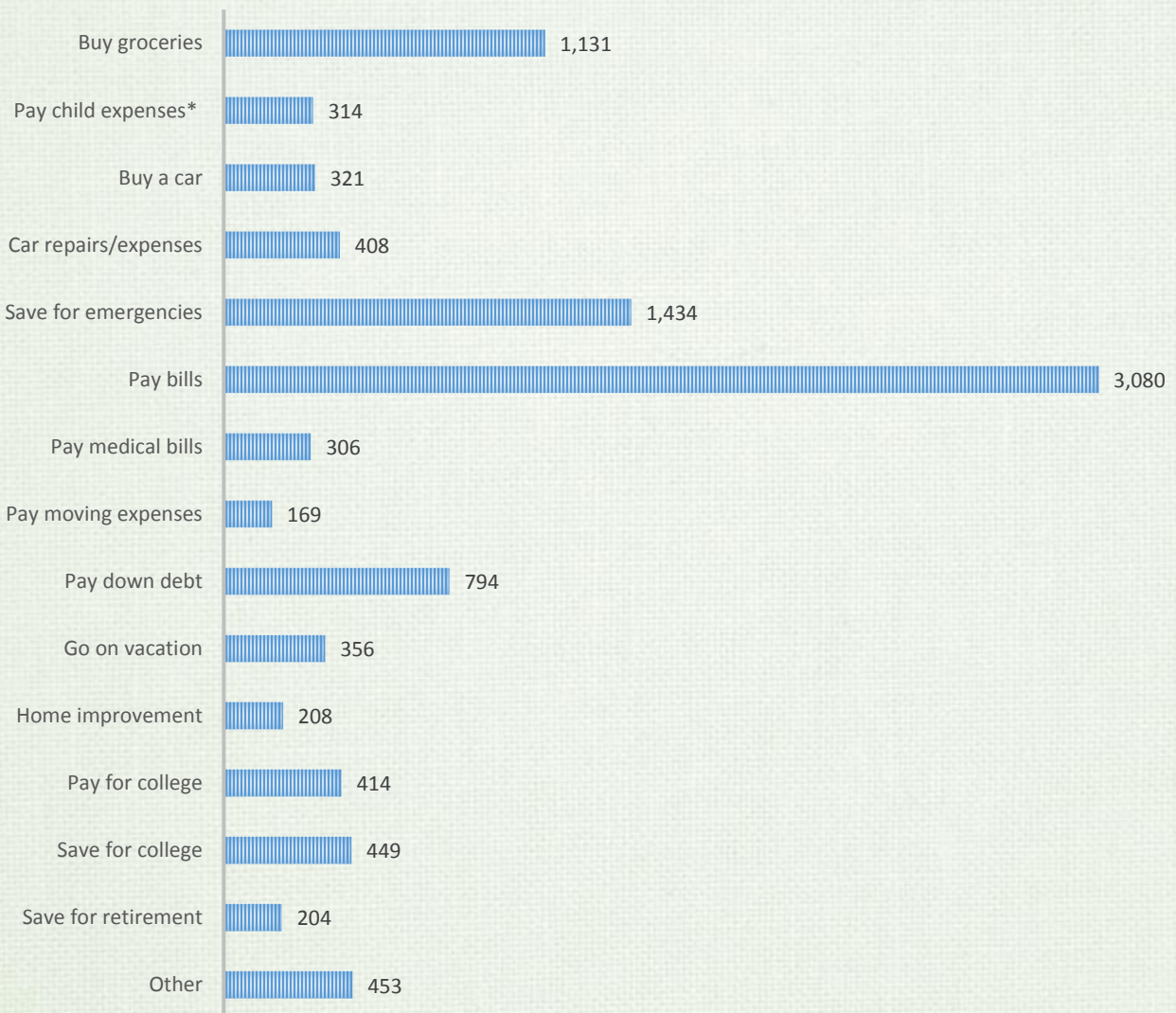
If You Received a Refund, Were You Able to Use It As You Intended?
(N=3732)



Taxpayer Survey Data

TAXES & REFUNDS

IF YOU GET A TAX REFUND THIS YEAR, WHAT DO YOU PLAN TO DO WITH THE MONEY?(N=5066)



*(including K-12 school fees)

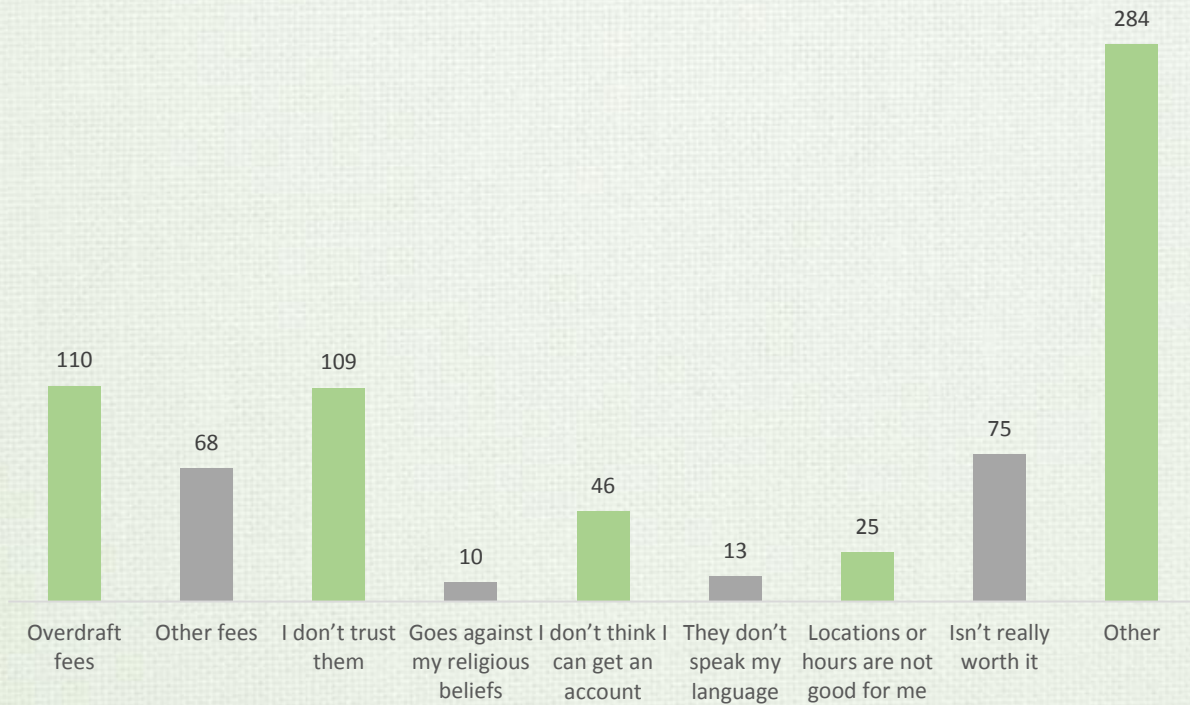
Taxpayer Survey Data

BANKING

Do You Have a Bank Account? (N=5277)



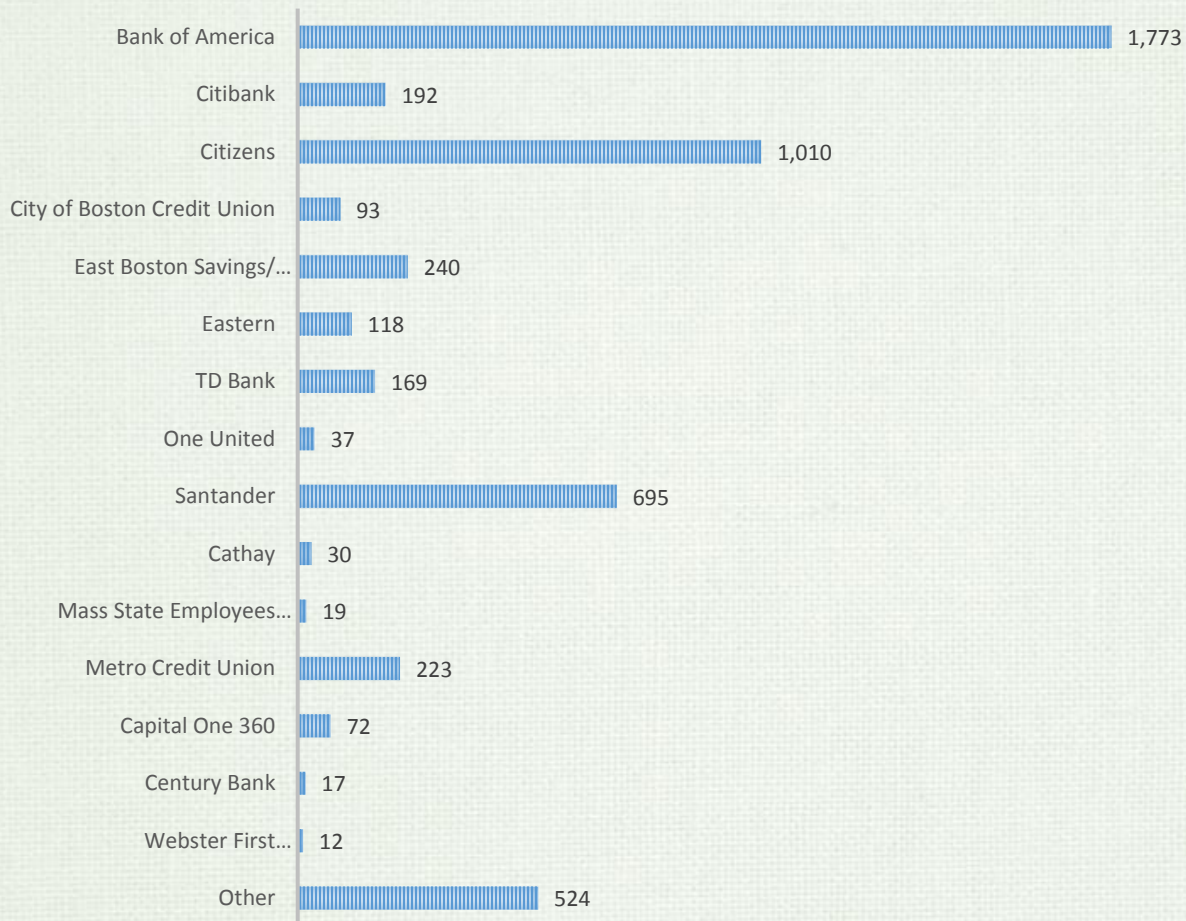
If You Don't Have Bank Account(s), Why Not? (N=664)



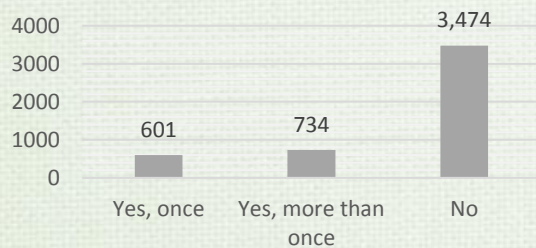
Taxpayer Survey Data

BANKING

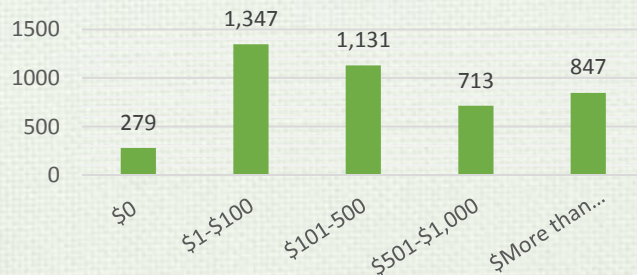
IF YOU HAVE BANK ACCOUNT(S), WITH WHOM DO YOU BANK WITH?
(N=4619)



Did You Pay An Overdraft Fee
In the Past 12 Months?
(N=4809)



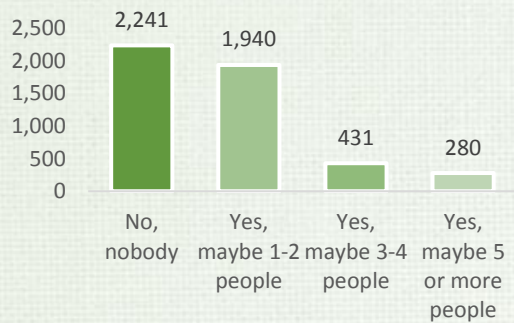
How Much Money Do You
Regularly Keep In Your Account?
(N=4317)



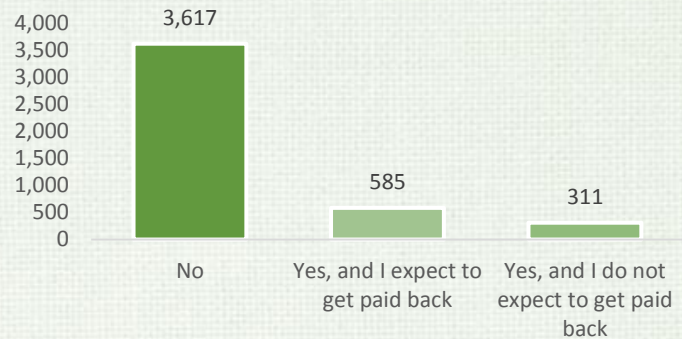
Taxpayer Survey Data

CREDIT AND MISCELLANEOUS

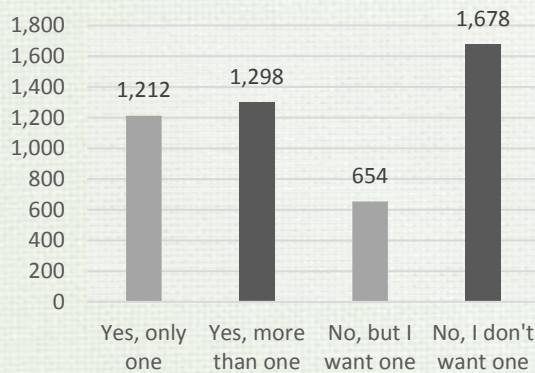
In The Event of a Financial Hardship, Do You Know Anyone Likely to Loan You \$200 or More If You asked? (N=4892)



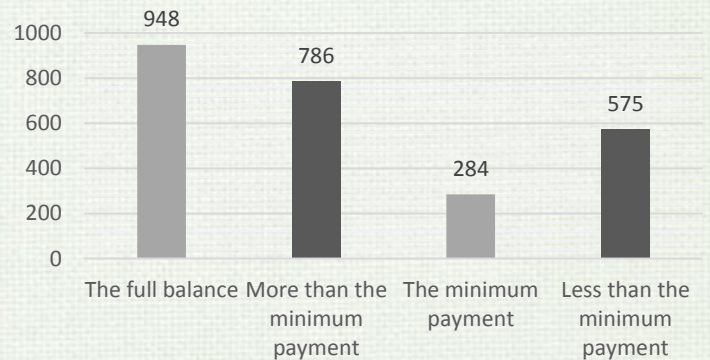
Did You Have a Friend or Relative that Borrowed \$200 or More From You Because of a Financial Hardship? (N=4513)



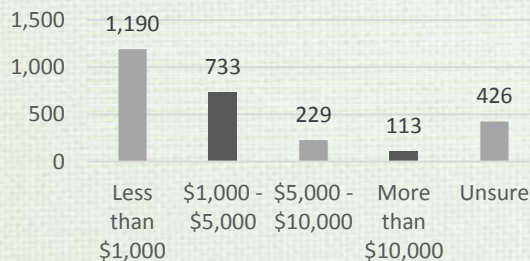
Do You Have One or More Credit Cards? (N=4842)



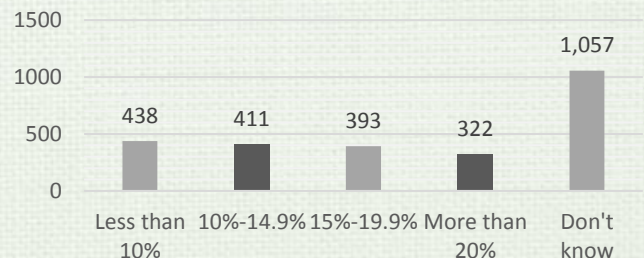
How Much Do You Usually Pay Each Month On Your Highest Balance Card? (N=2593)



What is Your Current Outstanding Balance On All Credit Cards?(N=2691)



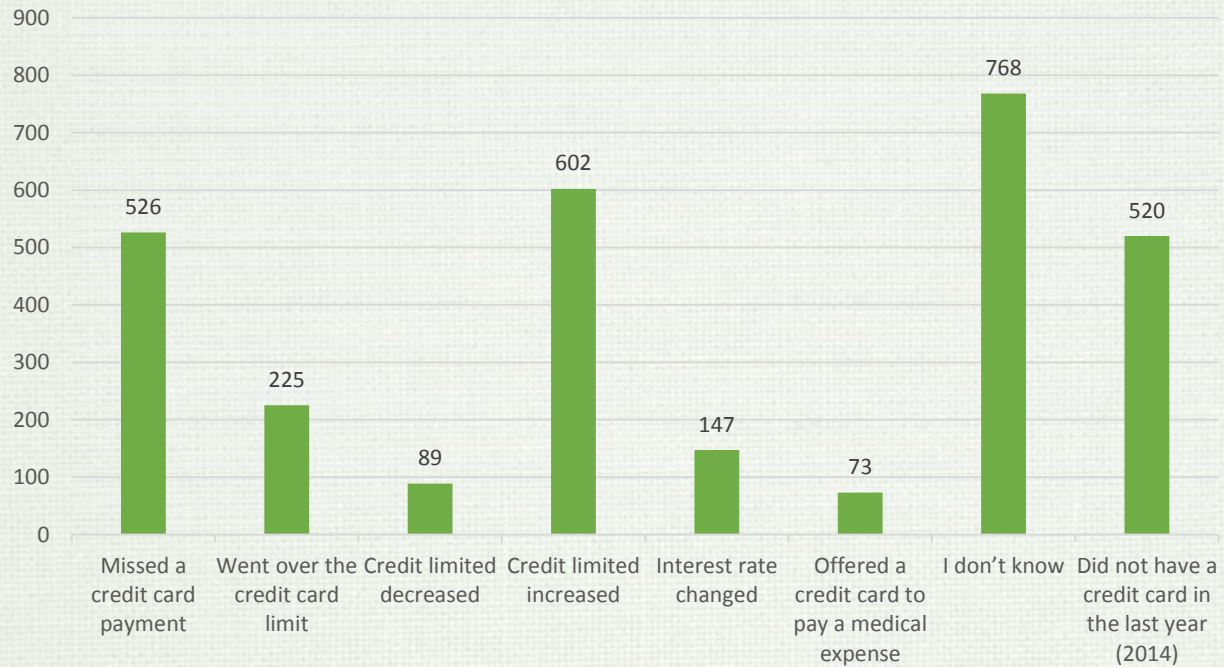
What Is The Interest Rate You are Charged On Your Credit Card? (N=2621)



Taxpayer Survey Data

CREDIT AND MISCELLANEOUS

Did You Experience Any of the Following Last Year with Credit Cards?
(N=2488)

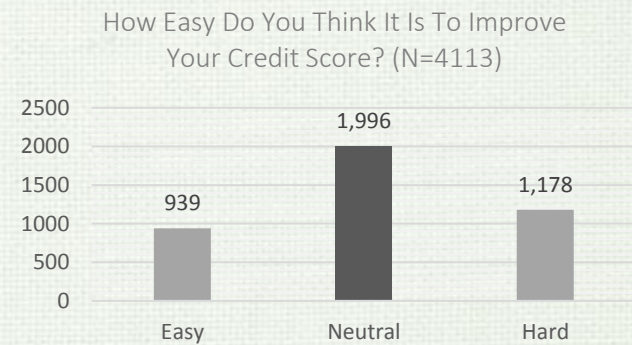
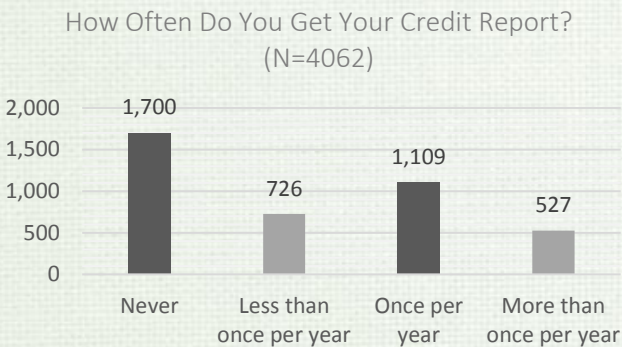
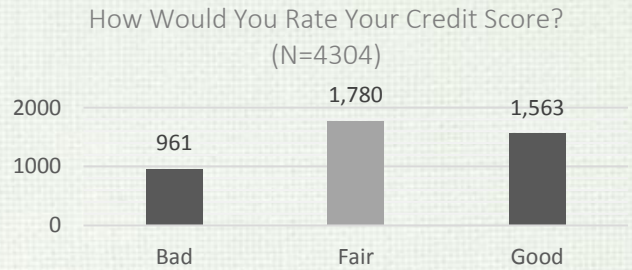
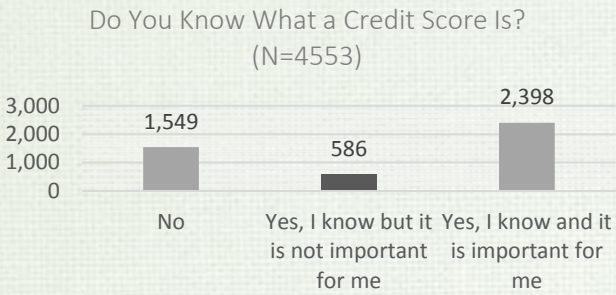


Did You Use a Credit Card In the Last Year (2014) For Any of the Following Reasons Because You had No Access to Cash To Pay? (N=2305)

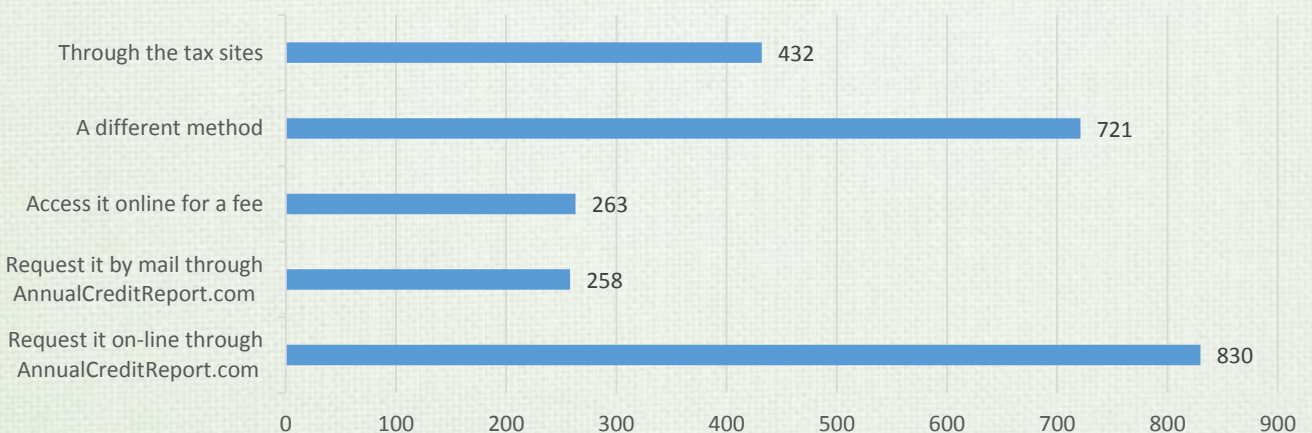


Taxpayer Survey Data

CREDIT AND MISCELLANEOUS



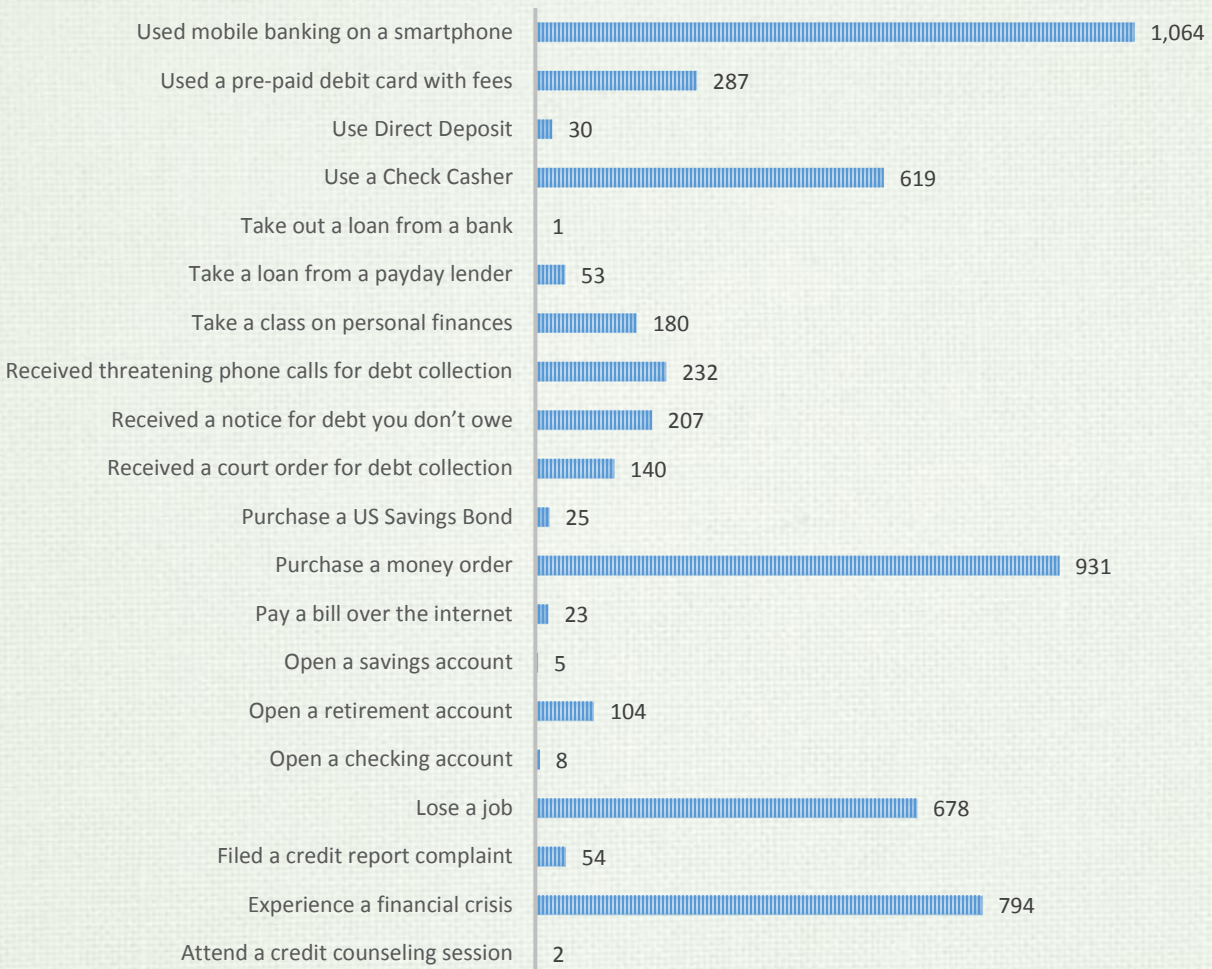
How Do You Get Your Credit Report? (N=2504)



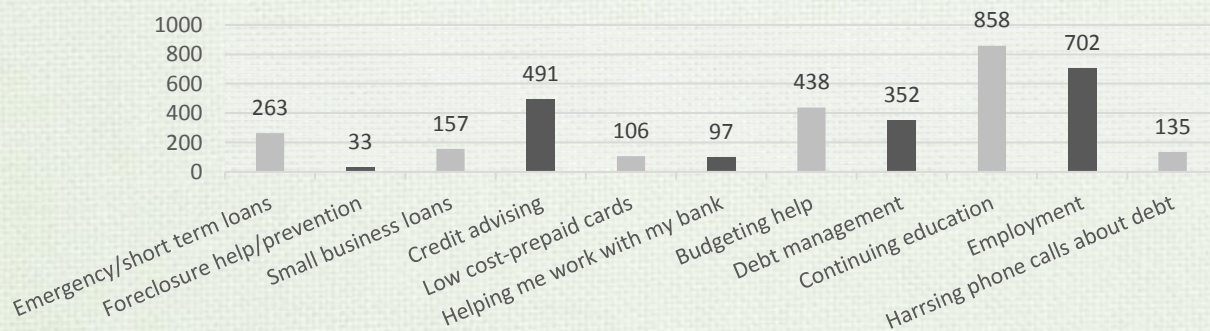
Taxpayer Survey Data

CREDIT AND MISCELLANEOUS

DURING 2015, DID YOU DO ANY OF THE FOLLOWING? (N=3057)



WOULD YOU LIKE HELP WITH ANY OF THE FOLLOWING? (N=1990)





BOSTON TAX HELP COALITION

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