

2008 BOSTON EITC CAMPAIGN TAXPAYER DATA REPORT



OPERATIONS INFORMATION 24 tax preparation locations

OUTREACH EFFORTS

# outreach flyers distributed across the City	73,784
# taxpayers receiving tax preparation	11,881

If the taxpayers served by the coalition paid an average of \$100 each for commercial tax preparation instead of using community services, they would have spent \$1,188,100 in the 2008 tax season.

QUICK COMPARISON: 2004 to 2008 CAMPAIGNS

	2004	2005	2006	2007	2008
# tax prep sites	22	20	22	22	24
# volunteers	239	214	192	213	275
# CA participants	xx	xx	150	673	1,044
# taxpayers served	4,860	5,836	7,993	8,877	11,881
total refunds	\$7.4M	\$8.7M	\$12.8M	\$15.0M	\$16.8
total EIC	\$2.5M	\$3.5M	\$4.8M	\$5.5M	\$6.4

Over the four years the Coalition has tracked data...

- more than 40,000 taxpayers have been served
- more than 1,200 volunteers have helped keep money in their local economies
- more than \$65M has been refunded to Boston's taxpayers
- more than 1,850 taxpayers participated in a Credit Advising (CA) session

TAXPAYER DATA 11,881 taxpayers served

TOTAL REFUNDS

Total combined refunds	\$16,769,574
Median combined refund	\$1,879
Average combined refund	\$1,060

TOTAL EARNED INCOME CREDITS

Total Earned Income Credits	\$6,367,707
Median combined EIC	\$1,650
Average combined EIC	\$1,086

FEDERAL REFUND DETAILS

Total Federal refunds	\$12,483,967
Median Federal refund	\$1,523
Average Federal refund	\$796
% claiming Fed refund	76.3%

MASSACHUSETTS REFUND DETAILS

Total Mass. refunds	\$2,916,258
Median Mass. refund	\$356
Average Mass. refund	\$264
% claiming Mass refund	76.3%

FEDERAL EARNED INCOME CREDIT DETAILS

Total Federal EIC	\$5,102,354
Median EIC	\$1,434
Average EIC	\$944
% taxpayers claiming EIC	33.1%

MASSACHUSETTS EIC DETAILS

Total Mass. EIC	\$765,353
Median EIC	\$215
Average EIC	\$142
% taxpayers claiming EIC	33.1%

• 17.1% of all Suffolk Co. taxpayers claimed EIC in 2002

• 27.3% of Suffolk Co. low-income taxpayers claimed EIC in 2002

FAMILY SIZE

One	7097	66.1%
Two	2108	19.6%
Three	989	9.2%
Four	393	3.7%
Five	124	1.2%
Six	23	0.2%
Seven or more	9	0.1%

AGE OF PRIMARY TAXPAYER

(10,699 taxpayers)

14-18	286	2.7%
19-24	1,778	16.6%
25-34	2,168	20.3%
35-44	1,757	16.4%
45-54	1,907	17.8%
55-64	1,399	13.1%
65 and older	1,404	13.1%

OTHER CREDITS

	Average	TOTAL
Child Tax Credit	\$176	\$1,890,277
Child Care Credit	\$17	\$184,183
Education Credits	\$39	\$414,398
Saver's Credit	\$9	\$96,330

2008 BOSTON EITC CAMPAIGN TAXPAYER DATA REPORT



TAXPAYER DATA 11,881 taxpayers served

Out of the 5,365 surveys that were filled out, 15.6% or 836 taxpayers indicated that they or a member of their family considers themselves as having a disability. Based on these numbers, the Coalition served an estimated total of **1,853** disabled clients in 2008. This is the breakdown of disability types:

Other physical disability	384	25.5%
Psychiatric or emotional disability	318	21.2%
Chronic Medical	154	10.2%
Learning Disability	151	10.0%
Other disabling condition	141	9.4%
Neurological Disability	103	6.9%
Blindness or other visual impairment	75	5.0%
Deafness or other hearing impairment	71	4.7%
Acquired Disability	60	4.0%
Developmental disability	46	3.1%

Zip Code Distribution

Dorchester 02124, 02125	1,766	16.9%	Roslindale 02131	363	3.5%	Chelsea 02150	77	0.7%
Roxbury 02119	1,029	9.8%	Mission Hill 02120	320	3.1%	Brockton 02301, 02302, 02303	74	0.7%
Grove Hall 02121	819	7.8%	Fenway/ Kenmore Sq. 02115, 02215	269	2.6%	Somerville 02143, 02144, 02145	66	0.6%
Mattapan 02126	712	6.8%	Quincy 02169, 02170, 02171, 02269	220	2.1%	Brookline 02445, 02446	64	0.6%
East Boston 02128	693	6.6%	Brighton 02135	165	1.6%	Everett 02149	56	0.5%
Boston, 02108, 02109, 02110, 02111, 02112, 02113, 02114, 02117, 02122, 02123, 02199, 02201, 02205, 02210	620	5.9%	Allston 02134	141	1.3%	Milton 02186	54	0.5%
			Back Bay 02116	129	1.2%	Lynn 01902, 01904, 01905	38	0.4%
			Malden 02148	128	1.2%			
			Cambridge 02138, 02139, 02140, 02141, 02163, 02238	105	1.0%	Newton 02458, 02459, 02460, 02461, 02462, 02464, 02465	31	0.3%
South Boston 02127	525	5.0%	Revere 02151	102	1.0%	Medford 02155, 02156	30	0.3%
South End 02118	503	4.8%	W. Roxbury 02132	82	0.8%	All other zip codes	221	2.1%
Jamaica Plain 02130	487	4.7%	Charlestown 02129	80	0.8%			
Hyde Park 02136, 02137	403	3.9%	Randolph 02368	78	0.7%			