

# Data Sources to Inform Free Tax Filing Programs

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# CBPP's Program Participation Dashboard

Estimated characteristics of people eligible for the EITC

## Data available

- Common industries and occupations
- Common languages spoken
- Education, race and ethnicity, and other demographics
- By state and for selected counties and metropolitan areas

# CBPP's Program Participation Dashboard

Estimated characteristics of people eligible for the EITC

## Potential uses

- Targeting outreach and services to communities with many potential EITC filers
- Educating partners and funders about the population eligible for the EITC

# CBPP's Program Participation Dashboard

Estimated characteristics of people eligible for the EITC

## Caveats

- Figures are estimates based on Census Bureau household survey data
- Shouldn't be compared with IRS data on actual EITC claims
- Currently available data is for 2018, but we hope to have updated data soon

# CBPP's Program Participation Dashboard

## EITC and CTC claims

### Data available

- Dashboard includes data on EITC and CTC claims by state and:
  - 118<sup>th</sup> congressional district
  - State legislative district (state house & state senate districts)
- The IRS publishes tax return data by state, county, metropolitan area, 117<sup>th</sup> congressional district, and ZIP code

# CBPP's Program Participation Dashboard

## EITC and CTC claims

### Potential uses

- Educating policymakers about:
  - How many of their constituents are helped by the EITC and CTC
  - How much \$ (and therefore economic activity) flows to their district thanks to the EITC and CTC

# Census Bureau Data

Data on low-income workers and families

## Data available

- American Community Survey data from [data.census.gov](https://data.census.gov)
- Numbers of individuals and families below the poverty line, number of households by income
  - Available down to the census tract (neighborhood) level
  - Can give a rough sense of where people potentially eligible for the EITC or ACTC live

# Census Bureau Data

Data on low-income workers and families

## Data available

- Employment statistics from [OnTheMap](#)
- Number of low-paid workers by place of work
  - Available down to the block level, and by industry
  - Can give a rough sense of where workers potentially eligible for the EITC are employed



# Tools for Geographic Analysis of Client Data

- Census geocoder
  - Find the county, city, congressional/state legislative district, metro area, and urban/rural status of an address
- Geocorr zip code crosswalk
  - Find the county, city, congressional/state legislative district, metro area, and urban/rural status of a zip code
- **Potential use:** Producing a geographic profile of clients served

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