

Stakeholder Partnerships, Education, and Communication Statistical Report

01. Participant's Name	02. Territory/Office Name	03. Office Location Code <div style="border: 1px solid black; display: inline-block; width: 100px; height: 20px; margin-top: 5px;"></div>	Date
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Participant Type: Please Check One Box

04. ☐ SPEC 05. ☐ Volunteers 06. ☐ Partners

Program Activity: Enter Information Specified by Instructions on Back

Program	Number of Taxpayer Contacts	Number of Volunteers	Number of Sites/Sessions
07. VITA			
08. Military VITA			
09. TCE - Non AARP			
10. AARP			
11. Bank, Post Office and Library (BPOL)			
12. Outreach - Media			
13. Outreach - Mailings			
14. Outreach - All Other			
15. EITC Media			
16. EITC - Mailings			
17. EITC - All Other			
18. E-Services - Media			
19. E-Services - Mailing			
20. E-Services - All Other			
21. Reserved			
22. Reserved			

Instructions For Completing Form 4913

All employees and volunteers who participate in Wage & Investment (W&I) educational activities should complete Form 4913 immediately following the activity. Stakeholder Partnerships, Education and Communication (SPEC) staff may complete the form for volunteers. SPEC Territory Managers and Management Assistants should complete Form 4913 only if they directly participate in a SPEC activity. SPEC Territory Managers will transmit Form 4913 data timely to the Detroit Computing Center (DCC) to reflect up-to-date weekly activity.

Note: Balance Measures & Diagnostics Data Dictionary defines many of the terms used on this form.

Lines 01-03 General—Enter employee/volunteer name, territory name, **Office Location Code** and the date of the activity.

Lines 04-06 Participant Type—Select the appropriate type and check the box.

Lines 07-22 Program Activity:

Number of Taxpayer Contacts—Record the number of taxpayer contacts for the Outreach, EITC, and E-Services program activities. SPEC no longer counts taxpayer contacts through the VITA, TCE, or BPOL programs.

Number of Volunteers—For all programs, record the number of volunteers. For VITA and TCE, a volunteer is someone who has completed training and/or actively involved in the program. Record volunteers only once for the fiscal year in each program area in which they participate (e.g., an individual volunteering in both VITA and BPOL would be counted once in each area).

Number of Sites/Sessions—For VITA (Lines 07–08) and TCE (Line 9), count each site location where assistance is offered to more than one taxpayer as **one site**. For a volunteer who travels to many different locations (e.g., nursing homes, schools or home visits) to provide a one-day assistance, count as **one site**.

For Bank, Post Office and Library (BPOL—Line 11), count only BPOL locations where volunteers are available to distribute forms, stock forms, or answer questions.

Media events (Lines 12, 15, and 18), include, but are not limited to, newspaper articles, television appearances, and radio show interviews. Media events are leveraged activities, therefore, are not associated with participant type 04, SPEC employee.

Mailings (Lines 13, 16, and 19) include paper and electronic means.

The “All Other” category through the outreach, EITC, and E-Services programs (Lines 14, 17, and 20), include, but are not limited to, educational seminars, meetings, and presentations, etc. Count each session every time the session is offered, even if it is offered at the same location. For conferences, conventions, and community service events, count each session where SPEC programs are presented.