

Earn It! Keep It! Save It!
 2020 Tax Season
 VITA/Free Tax Preparation Application

Grant Criteria	Description
Community need	We want to ensure that critical, underserved populations are served.
IRS Quality Site Requirements (QSR) assessment	There are 10 IRS Quality Site Requirements that you are responsible for following as a VITA site.
Tax returns prepared	Grants will be provided to VITA sites that demonstrate the ability to grow.
Demonstrated commitment to VITA	We are looking for sites that demonstrate a commitment to VITA through: <ul style="list-style-type: none"> • A visible effort to serve taxpayers and your community well • The desire to innovate • VITA is an important component of your organization’s programs/services • Integration of savings promotion
Ability to meet grant requirements	If your site received funding in 2019, were you able to submit all required reports/documents on time and attend all required meetings or trainings?

Grant Requirements:

1. Meeting and training attendance including county monthly meetings and the Regional Conference.
2. New site coordinators are also required to attend a new site coordinator training and the TaxSlayer Administrator training.
3. Integration of savings promotion into your tax preparation services and 3% of your taxpayers will split their refund on Form 8888.
4. Submission of your volunteer report, including name, email, certification and employer or college name to United Way.
5. Follow IRS Quality Site Requirements.
6. Prepare your goal number of tax returns.
7. Using TaxSlayer to ask and collect answers to survey questions provided by UWBA and submit summary reports to UWBA.
8. Report all returns (e-file, paper, amended, etc.) prepared to UWBA in final report.
9. Host representatives from UWBA to collect client stories during tax preparation open hours once throughout the season.
10. Report education and outreach initiatives to UWBA as part of the final report.



Earn It! Keep It! Save It!
 2020 Tax Season
 VITA/Free Tax Preparation Application

Application Questions:

Organizational Information:

1. Legal Name:
2. List all VITA Site location(s):
3. List any new VITA Sites for 2020:
4. Does your site currently offer tax services year-round? Nearly 10% of filers may file after the deadline. We are interested in increasing year-round services.
 - Yes
 - No
 - We would stay open year-round with help from UWBA.
5. Is someone at your organization's VITA site a current Certifying Acceptance Agent (CAA)? A CAA prepares, certifies and submits ITIN applications (W-7).
 - Yes
 - No
 - We would become a CAA with help from UWBA.
6. Does your organization have the capacity to manage federal grant funds?
 - Yes
 - No
7. Our IRS grant goal for the region is 49,822 returns. Last season, we completed 46,048, or 92% of our goal.
 - a. Please share the number of returns you completed in 2019:
 - b. Please share your 2020 goal:
 - c. Please explain any increase or decrease in your goal amount.

Free Tax Preparation Budget

Please provide us with your **total** expected 2020 program expenses. These numbers should reflect approximate expenses for the upcoming tax season. Enter expense description for each category. For example, for "Staff" you may write "Full time site coordinator salary and benefits".

Expense Item	Expense Amounts	Description
Staff	\$	
Space & Utilities	\$	
Supplies	\$	
Equipment/Technology	\$	
Publicity/Outreach	\$	



Earn It! Keep It! Save It!
2020 Tax Season
VITA/Free Tax Preparation Application

Food	\$	
Volunteer Recognition	\$	
Other:	\$	
Other:	\$	
Other:	\$	
Other:	\$	