

Projected Operations VITA Grant Application

Purpose: This form is to be used by VITA Grant applicants. It should accompany the VITA Grant Application and include estimates expected for next filing season in the categories shown. Note: At least 90% of the total number of federal returns prepared must meet the low income threshold.

Name of organization _____ Period of performance
October 1, _____ to September 30, _____

Federal Return Preparation	Number of Returns
1. Federal returns filed electronically	
2. Federal returns filed as paper	
3. Federal returns filed through MyFreeTaxes	
4. Total federal returns prepared <i>(Add lines 1-3)</i>	

Return Preparation Site Information <i>(Complete page 2 with site information)</i>	Number of Sites
5. Traditional sites	
6. Virtual sites	
7. Facilitated self-assistance sites	
8. Total proposed sites <i>(Add lines 5-7)</i>	

<i>Estimate the number of volunteers and the total hours the volunteers will work by type of position they will occupy.</i>	Number of Volunteers	Total Volunteer Hours
9. Tax preparers		
10. Support		
11. Site coordinators		
12. Instructors		
13. Program administrators		

Estimate the number of federal tax returns expected to prepare for each underserved population. Choose only one population as your primary and one population as your secondary focus.

Underserved Population	Primary <i>(select one)</i>	Secondary <i>(select one)</i>	Number of Returns
14. Elderly	<input type="checkbox"/>	<input type="checkbox"/>	
15. Rural	<input type="checkbox"/>	<input type="checkbox"/>	
16. Persons with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	
17. Limited English proficient	<input type="checkbox"/>	<input type="checkbox"/>	
18. Native American	<input type="checkbox"/>	<input type="checkbox"/>	
19. Low income <i>(not included in lines 14 - 18)</i>	<input type="checkbox"/>	<input type="checkbox"/>	

Comments/Remarks

Note: To be completed when applying for entry into the program.

Complete the following table with existing and proposed site information. Provide the EFIN (Electronic Filing Identification Number) and SIDN (Site Identification Number) for each site. If more space is required to list all the program's site, please provide the information in a word or excel document.

Site Name	EFIN	SIDN	City	State	Open All Year	
					Yes	No
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
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					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Instructions for Form 13978, Projected Operations VITA Grant Application

- Line 1** Record the number of low income federal returns expected to file electronically.
- Line 2** Record the number of low income federal returns expected to file as a paper return.
- Line 3** Record the number of low income federal returns expected to file through MyFreeTaxes.
- Line 4** Record the total low income federal returns expected to file. This is the sum of lines 1 through 3.
- Line 5** Record the number of sites planned to operate during the next filing season as traditional site locations.
- Line 6** Record the number of sites planned to operate during the next filing season as virtual site locations.
- Line 7** Record the number of sites planned to operate during the next filing season Facilitated Self-Assistance (FSA) locations.
- Line 8** Record the total number of established and new sites that will operate. This is the sum of lines 5 through 7.
- Line 9** Record the number of volunteers whose primary responsibility will be certified tax return preparers and record the total hours expected to work by all these volunteers.
- Line 10** Record the number of volunteers whose primary responsibility will be support personnel such as a greeter and record the total hours expected to work by all these volunteers.
- Line 11** Record the number of volunteers whose primary responsibility will be site coordinators and record the total hours expected to work by all these volunteers.
- Line 12** Record the number of volunteers whose primary responsibility will be instructors and record the total hours expected to work by all these volunteers.
- Line 13** Record the number of volunteers whose primary responsibility will be program administrators and record the total hours expected to work by all these volunteers.
- Line 14** Estimate the total number of federal returns expected to prepare for the low income elderly population.
- Line 15** Estimate the total number of federal returns expected to prepare for the low income rural population.
- Line 16** Estimate the total number of federal returns expected to prepare for the low income person with disabilities population.
- Line 17** Estimate the total number of federal returns expected to prepare for the low income limited English proficient population.
- Line 18** Estimate the total number of federal returns expected to prepare for the low income Native American population.
- Line 19** Estimate the total number of federal returns expected to prepare for the low income population not included in lines 14 through 18.

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The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for information is 5 U.S.C. 301. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-2222. The time estimated for participation is 30 minutes. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.