

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, _____
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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.

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.