



## 2019 VITA Grant

### *Introduction*

The Volunteer Income Tax Assistance (VITA) Program grant is a United Way of Collier County initiative designed to support free tax preparation service for the ALICE households with a combined household income of \$68,000 or less. This service helps low-to-moderate income individuals, persons with disabilities, the elderly, and limited English speakers file their taxes each year.

VITA tax preparers are certified using IRS training materials and serve in a volunteer capacity. VITA sites can be used as a tool for sustained outreach to the community and can help an agency provide wrap-around services. In addition, many types of financial education and asset building programs can be incorporated into a VITA site as a motivator for clients to save a portion of their refunds.

This grant allows United Way of Collier County and its partner agencies to:

- Increase VITA services in Collier County;
- Increase the number of returns filed electronically;
- Increase the total amount of dollars returned to Collier County.

Grants will be awarded on an annual basis in the amount of \$15,000.

### *Eligibility*

The following requirements must be met for an agency to receive funding through the VITA grant:

- 501(c)(3) organization;
- Agency serves Collier County.

### *Funding Guidelines*

Grant funding can be used for:

- Administrative or staffing reimbursement up to \$7,500
- Supplies reimbursement (computers, paper, printers, toner, calculators, etc.) up to \$2,500;
- Reimbursement of \$50/transmitted e-file up to \$5,000.

Organizations that are awarded grants will be required to:

- Establish a VITA site for the full 2019 season;
- Designate one staff member to serve as the Site Coordinator for the full 2019 season;
- Provide supplies;
- Submit a minimum of four (4) client narratives and any additional reports as requested.



***VITA Site Coordinator***

Site Coordinators are responsible for managing, organizing, coordinating, and supervising all aspects of VITA site operations. Responsibilities include, but are not limited to:

- Recruiting and supervising volunteers;
- Determining site’s days and hours of operation;
- Ordering supplies;
- Promoting and marketing the program;
- Ensuring Volunteer Standards of Conduct are followed by all volunteers;
- Ensuring Quality Site Requirements are followed by all volunteers;
- Serving as the Responsible Official, applying for and/or maintaining the Electronic Filing Identification;
- Managing client inquiries after filing season has closed.

***VITA Site Requirements***

Important considerations include the physical location and existing client base of the site. Sites located at an agency with a large, eligible population have a better chance of hosting a successful VITA site. Sites should be quiet and promote confidentiality. Computers for each volunteer tax preparer and other supplies (printer, toner, pens, paper, stapler, calculators, etc.) must be provided. Sites must operate at a minimum of 1 day per week and must transmit a minimum of 50 e-filings to remain eligible for future funding.

***Application and Grant Timeline***

<b>September 3, 2019</b>	<ul style="list-style-type: none"> <li>• Announcement of funds</li> <li>• 2019 VITA online application opens</li> </ul>
<b>October 4, 2019</b>	<ul style="list-style-type: none"> <li>• Completed grant applications due by 5pm</li> </ul>
<b>October 2019</b>	<ul style="list-style-type: none"> <li>• Review phase</li> <li>• VITA Grant awards announced</li> <li>• Agency Agreements executed</li> </ul>
<b>June 2020</b>	<ul style="list-style-type: none"> <li>• Funds disbursed</li> </ul>

***Application Process***

Applications are by invitation only. You may be invited to apply by contacting Lauren Branson at [lauren.branson@uwcollier.org](mailto:lauren.branson@uwcollier.org) with subject line “**VITA 2019.**” All applications are to be submitted online through Community Force which can be accessed at [uwcc.communityforce.com](http://uwcc.communityforce.com). No late or incomplete submissions will be accepted. Submitted applications will be reviewed by United Way of Collier County staff. Applicants are subject to a one-on-one interview or site visit as deemed appropriate by staff.