

Form **13980**  
(June 2008)

Department of the Treasury— Internal Revenue Service

**Business Results**  
**VITA Grant Program Year End Report**

**2009**

**Purpose:** This form is to be used by VITA Grant Program grantees. It should accompany the completed VITA Grant Program Year End Narrative due September 30 and should represent the grantees performance for the below grant period in the categories listed.

<b>Name of Partner:</b>		<b>Grant Period: October 1, _____</b> <b>through June 30, _____</b>
<b>Federal Return Preparation</b>		<b>Number of Returns</b>
1. Total low income federal returns filed electronically		
2. Total low income federal returns filed as paper returns		
3. Total low income federal returns prepared (Add lines 1 & 2)		
<b>Return Preparation Site Information</b>		<b>Number of Sites</b>
4. Total established sites - fixed location		
5. Total established sites - ad hoc location		
6. Total new sites - fixed location		
7. Total new sites - ad hoc location		
8. Total sites operated (Add lines 4 through 7)		
9. Total sites offering paper only return preparation		
10. Total sites offering electronic filing		
11. Total tax preparation software packages provided by the IRS		
<b>Quality Review Method Used at Sites</b>		<b>Number of Sites</b>
12. Total sites using peer review		
13. Total sites using designated review		
<b>Volunteers and Total Volunteer Hours</b>		<b>Volunteers</b>
14. Total number of all volunteers		
15. Total number of all volunteer hours		
<b>Volunteer Certification - Record the number of volunteers certified at each training level shown in items 17-23. Volunteers with multiple certification levels should be shown in each level they are certified. Volunteers not certified should be recorded on line 16.</b>		<b>Number of Volunteers</b>
16. Volunteers not certified		
17. Volunteer certified in VITA/TCE Basic		
18. Volunteer certified in VITA/TCE Intermediate		
19. Volunteer certified in VITA/TCE Advanced		
20. Volunteer certified in VITA/TCE International		
21. Volunteer certified in VITA Military		
22. Volunteer certified in VITA Foreign Student		
23. Volunteer certified in VITA Puerto Rico		
<b>Underserved Population - Indicate the number of federal tax returns prepared for each underserved population.</b>		<b>Number of Returns</b>
24. Low income elderly		
25. Low income rural		
26. Low income disabled		
27. Low income limited English proficient		
28. Low income Native American		
29. Low income (not included in Lines 24-28)		
<b>Dollars Generated</b>		<b>Dollars</b>
30. Total EITC refund dollars generated by low income federal returns filed		
31. Total refund dollars generated by low income federal returns filed		

**Signature**

**Signature Of Responsible Official**

**Date**

---

## Instructions – VITA Grant Program Plan – Program Effectiveness

---

- Line 1 Record the number of low income federal returns filed electronically.
- Line 2 Record the number of low income federal returns filed as a paper return.
- Line 3 Record the total low income federal returns filed. This is the sum of lines 1 and 2.
- Line 4 Record the number of sites that were already established that operated during this filing season in fixed site locations.
- Line 5 Record the number of sites that were already established that operated during this filing season in ad hoc site locations. More explanation on fixed and ad hoc sites can be found in the glossary section of Publication 4671.
- Line 6 Record the number of new sites that operated during this filing season in fixed site locations.
- Line 7 Record the number of new sites that operated during this filing season in ad hoc site locations. More explanation on fixed and ad hoc sites can be found in the glossary section of Publication 4671.
- Line 8 Record the number of sites operated. This is the sum of lines 4 through 7.
- Line 9 Record the total number of sites that offered paper only return preparation.
- Line 10 Record the total number of sites that offered electronic filing.
- Line 11 Record the number of tax preparation software packages provided by the IRS for the sites covered by this grant.
- Line 12 Record the number of sites that used peer review.
- Line 13 Record the number of sites that used designated review.
- Line 14 Record the total number of volunteers.
- Line 15 Record the total number of volunteer hours.
- Line 16 Record the total number of volunteers that served in a support role and did not successfully complete certification in one of the tax law courses.
- Line 17 Record the total number of volunteers that successfully certified on the VITA/TCE Basic tax law training.
- Line 18 Record the total number of volunteers that successfully certified on the VITA/TCE Intermediate tax law training.
- Line 19 Record the total number of volunteers that successfully certified on the VITA/TCE Advanced tax law training.
- Line 20 Record the total number of volunteers that successfully certified on the VITA/TCE International tax law training.
- Line 21 Record the total number of volunteers that successfully certified on the VITA Military tax law training.
- Line 22 Record the total number of volunteers that successfully certified on the VITA Foreign Student tax law training.
- Line 23 Record the total number of volunteers that successfully certified on the VITA Puerto Rico tax law training.
- Line 24 Record the total number of federal returns prepared for the low income elderly population.
- Line 25 Record the total number of federal returns prepared for the low income rural population.
- Line 26 Record the total number of federal returns prepared for the low income disabled population.
- Line 27 Record the total number of federal returns prepared for the low income limited English proficient population.
- Line 28 Record the total number of federal returns prepared for the low income Native American population.
- Line 29 Record the total number of federal returns prepared for the low income population not included in Lines 24 - 28.
- Line 30 Record the total EITC dollars generated by all low income federal returns filed.
- Line 31 Record the total refund dollars generated by all low income federal returns filed.