

Form **13978**
(June 2008)

Department of the Treasury – Internal Revenue Service

**Projected Operations
VITA Grant Program Application Plan**

2009

Purpose: This form is to be used by VITA Grant Program applicants. It should **accompany the completed VITA Grant Program Application Plan** and should include estimates expected for next filing season in the categories shown.

Name of Partner:	Grant Period: October 1, _____ through June 30, _____
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Federal Return Preparation	Number of Returns
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)	

Return Preparation Site Information	Number of Sites
4. Total established sites - fixed location	
5. Total established sites - ad hoc location	
6. Total proposed new sites - fixed location	
7. Total proposed 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 licenses required by the IRS	

Quality Review Method Planned at Sites	Number of Sites
12. Total sites using peer review	
13. Total sites using designated review	

Estimate the number of volunteers and the total hours the volunteers will work by type of position they will occupy.	Number of Volunteers	Total Volunteer Hours
14. Tax Assistors - Certified		
15. Support (Greeters, etc.) - Non-certified		
16. Site Coordinators		
17. Instructors		
18. 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 – select one	Secondary – select one	Number of Returns
19. Low income elderly	<input type="checkbox"/>	<input type="checkbox"/>	
20. Low income rural	<input type="checkbox"/>	<input type="checkbox"/>	
21. Low income disabled	<input type="checkbox"/>	<input type="checkbox"/>	
22. Low income limited English proficient	<input type="checkbox"/>	<input type="checkbox"/>	
23. Low income Native American	<input type="checkbox"/>	<input type="checkbox"/>	
24. Low income (not included in Lines 19-23)	<input type="checkbox"/>	<input type="checkbox"/>	

Comments/Remarks

Signature	
Signature Of Responsible Official	Date

Instructions – Projected Operations – VITA Grant Program Plan

- 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 total low income federal returns expected to file. This is the sum of lines 1 and 2.
- Line 4 Record the number of sites already established that will operate during the next filing season in fixed site locations.
- Line 5 Record the number of sites already established that will operate during the next 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 proposed new sites that will operate during the next filing season in fixed site locations.
- Line 7 Record the number of proposed new sites that will operate during the next 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 total number of established and new sites that will operate. This is the sum of lines 4 through 7.
- Line 9 Record the total number of established and proposed new sites that will offer paper filing only.
- Line 10 Record the total number of established and proposed new sites that will offer electronic filing.
- Line 11 Record the number of tax preparation software packages required from IRS for the sites covered by this grant. More information for determining this information can be found in the tax preparation software section of Publication 4671.
- Line 12 Record the number of sites that will use peer review method of quality review.
- Line 13 Record the number of sites that will use designated review method of quality review.
- Line 14 Record the number of volunteers whose primary responsibility will be certified tax return assistors and record the total hours expected to work by all these volunteers.
- Line 15 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 16 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 17 Record the number of volunteers whose primary responsibility will be instructors and record the total hours expected to work by all these volunteers.
- Line 18 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 19 Estimate the total number of federal returns expected to prepare for the low income elderly population.
- Line 20 Estimate the total number of federal returns expected to prepare for the low income rural population.
- Line 21 Estimate the total number of federal returns expected to prepare for the low income disabled population.
- Line 22 Estimate the total number of federal returns expected to prepare for the low income limited English proficient population.
- Line 23 Estimate the total number of federal returns expected to prepare for the low income Native American population.
- Line 24 Estimate the total number of federal returns expected to prepare for the low income population not included in lines 19 through 23.