



SPEC is happy to announce that the VITA Grant Program is returning for Filing Season 2010. SPEC will once again administer the program and the Grant Program Office is already well on its way to posting the new announcement and application process. The Grant Program Office will be hosting conference calls about the grant in late May and more information will be released soon, including revisions of the following publications:

Please find below key information regarding not only the VITA Grant but also the Tax Counseling for the Elderly Grant (TCE) including key dates as well as information on the changes for the 2010 Filing Season.

I will forward to each of you new information as soon as I receive it from the Grant Program Office. Please feel free to contact me with any questions or concerns.

Thanks

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Contacts for VITA Grant Application Questions

Questions about the VITA Grant should be directed to the GPO by:

- Phone: 404.338.7894 – Available Monday through Friday (except Federal holidays) from 8:00 a.m. to 4:00 p.m.
- Email: Grant.Program.Office@irs.gov – Available 24/7; Responses will generally only be provided Monday through Friday between 8:00 a.m. and 4:00 p.m.
- Web: IRS.gov, Search: VITA Grant – Available 24/7. Look for application aides and *Frequently Asked Questions*.





Changes in the Application Process

The GPO requested feedback on the application process from both internal and external sources. Feedback was extensive and many of the suggested changes were adopted. Highlights of these changes are shown below.

- Changed the program period to a full year (July 1, 2009 – June 30, 2010).
- Changed the opening and closing dates of the application (June 1, 2009 to July 17, 2009).
- Combined the Background and Program Plan Narratives into a single Program Plan Narrative to eliminate duplicate requests for the same information.
- Increased allowable volunteer recognition to \$10.
- Eliminated the limitation of volunteer services for matching.
- Eliminated the limitation of rental space for matching.
- Changed package layout to “walk” the applicant through each of the required components of the application.
- Combined certifications to eliminate need for separate signed documents.
- Expanded discussion under Eligibility Requirements to assist interested applicants in determining whether they are eligible.
- Incorporated use of standard grant forms in lieu of IRS developed forms to provide consistency between other federal grant processes.

VITA Grant Program Timeline	
Application Period	June 1 – July 17, 2009
Review and Ranking	July 17 – October 30, 2009
Notification of Selection/Non-Selection	October 30, 2009
Funds Available for Use	December 1, 2009
Program Period	July 1, 2009 – June 30, 2010





Application Process

The grant application package will be announced via Grants.gov on June 1, 2009. Application materials will be available on Grants.gov and on IRS.gov. The Grant Program Office will use Grants.gov for **announcing the VITA Grant application only**. Applications **will not** be accepted via Grants.gov this year. Grants.gov expects increased system activity resulting from the American Recovery and Reinvestment Act of 2009, and they are taking steps to alleviate system strain and increase capacity. Agencies were asked to utilize alternative methods to assist in reducing activity on the automated system. The VITA Grant and TCE programs elected to utilize paper submission.

Partners can obtain Publication 4671 from the Grants.gov or IRS.gov websites. An original, one copy and a CD of the application should be mailed or sent by courier to the GPO to be received on or before July 17, 2009.

Eligibility Requirements

To be eligible for funding under the VITA Grant Program, applicants must meet the following requirements:

- **Qualify as a non-profit organization or government entity**
- **Demonstrate tax compliance with filed federal returns and payments**
- **Provide matching funds**
- **Not be debarred or suspended**
- **Have an A-133 unqualified opinion or qualified opinion without significant deficiency when required by OMB Circular A-133**
- **Complete all required reporting due, if applicant is a previous VITA grant recipient**

Documentation must be provided upon submission of the application to support these requirements. More detailed information may be found in the Publication 4671.





Tax Counseling for the Elderly

Remember in addition to the VITA Grant, IRS offers a Tax Counseling for the Elderly grant that primarily serves elderly individuals. TCE requires that at least sixty five percent of all electronically-filed returns completed are for taxpayers aged 60 or over. Also, TCE does not require a dollar-for-dollar match. Encourage your partners to see Publication 1101, TCE Application Package and Guidelines for Managing a TCE Program, for information on this grant.

TCE Program Timeline	
Application Period	June 1 – August 3, 2009
Review and Ranking	August 3 – October 30, 2009
Notification of Selection/Non-Selection	October 30, 2009
Funds Available for Use	December 1, 2009
Program Period	October 1, 2009 – September 30, 2010

