



Request for Applications (RFA)

Earn It, Keep It, Save It

Funds available for the Volunteer Income Tax Assistance Program

Date issued: Friday, August 30, 2019

Important Dates:

Applications Due: Friday, September 27, 2019 by 3:00PM

Grant Period: October 31, 2019 to May 31, 2020

Grants Notification: October 31, 2019

Questions related to this RFA should be directed to:

Olivia Alston

Program Manager, Income
United Way of Greater Atlanta
oyalston@unitedwayatlanta.org

Background

The Volunteer Income Tax Assistance (VITA) program is a more than 40-year running, national IRS program where certified and trained volunteers prepare tax returns for low income families according to IRS guidelines. United Way of Greater Atlanta in partnership with the Internal Revenue Service (IRS) leads a coalition of approximately 30 organizations that promote and support free tax preparation. Free tax preparation supports United Way's goal to build a stronger future for greater Atlanta by supporting the well-being of its children, the families that support them and the community that surrounds them by:

- Saving moderate and lower-income families the cost of paying for tax preparation
- Ensuring working families receive the valuable tax credits they deserve, such as the Earned Income Tax Credit (EITC) and Child Tax Credit (CTC)
- Providing an alternate to predatory or unsafe tax preparation options
- Connecting families to low or no cost financial services and asset building programs

United Way is inviting organizations interested in becoming VITA sites to submit an application for funding. Partners will be provided with funding and support to provide free tax preparation at locations across the region.

Awards to specific partners will depend upon details of the funding available from the IRS, the review of applications, performance targets, feasibility of plan and past performance (existing partners).

Funding may be for one or more of the following:

- VITA site operations and volunteer management (this DOES NOT include pay for tax preparers)
- Creation and distribution of marketing and outreach materials for your site(s)
- Site supplies such as paper, pencils/pens, staplers, ink cartridges, etc.
- Rental or purchase of computers, printers, and other equipment needed to successfully complete and e-file tax returns

Eligibility Requirements

At a minimum, organizations must meet all of the following criteria to apply for and receive funding:

- Be recognized as an organization exempt from federal income tax under I.R.S Section 501(c)(3) of the Internal Revenue Code 1986
- Be a faith-based organization or educational institution involved in providing program(s) and services that are health, education or human-service related and directly serve the UWGA 13-county service area residents. The organization must maintain a local office with regular office hours and telephone availability.
- Have an independent governing body consisting of at least nine voting members. This governing body has the authority to decide policy and strategic direction with respect to the agency's programs, administration and finances, in accordance with the organization's By-Laws, and who shall meet at least four times per year. Paid staff must not be a voting member of the Board.
- Maintain a non-discrimination policy or plan that does not discriminate on the basis of race, cultural heritage, religion, gender, national origin, age, marital status, sexual orientation, veteran status or status as a qualified disabled or handicapped individual.
- Have an annual audit (if applicable) performed by a certified public accountant that is licensed and in good standing with the state of Georgia.

Application Timeline

- The application process will begin in September 2019. At that time, the application will be made available on United Way's VITA page.
- To learn about all aspects of the program, the application process and a high level explanation of the review process, an orientation sessions will be scheduled for Friday, September 20, 2019 at 10:00 AM. Attending an orientation session is recommended for all potential new partners.
- All sites will be selected and notified by October 31, 2019
- MOU must be signed by January 31, 2020

Application Requirements

1. Application must be submitted by **3:00 PM, Friday, September 27, 2019. No late applications will be accepted. Applications must be emailed to vita@unitedwayatlanta.org. Applications emailed to another email address will NOT be considered. No late applications will be accepted.**
2. Application must demonstrate how the VITA services will be integrated into organizational programming including but not limited to linkage to other financial stability programs.
3. Application must demonstrate strategies for the recruitment of volunteers.
4. A concise budget narrative is required
5. Applicant must provide a minimum 10% cash match.
6. Additional funding may be provided for organizations willing to operate year-round sites.

Target Population: The target population for this service is individuals/families who make less than a household income of \$55,000.00. Limited English Speakers, disabled individuals/families and individuals/families eligible for the Earned Income Tax Credit and Child Tax Credit.

Required Activities: Volunteer Income Tax Assistance (VITA) site operation, volunteer recruitment and promotion of the free tax preparation service,

Required Minimum Output:

1. Minimum one (1) VITA location opening no later than February 1, 2020 and operating until April 15, 2020 providing free tax preparation and community outreach for tax filers and volunteers
2. Minimum of 350 tax returns filed successfully. Consideration will be made for organizations serving a specialized group such as limited English speakers.

Roles and Responsibilities

- United Way of Greater Atlanta
 - Secure funding on behalf of the coalition
 - Funding for sites (amount depends on available funding)
 - Training for staff, site coordinators and volunteers
 - TaxSlayer software needed to prepare and E-File tax returns
 - Technical assistance and trouble-shooting throughout the tax season
 - A regional hotline resource number (2-1-1)
 - Promotion of VITA sites
 - Regional and county specific outreach materials and media relations
 - Connections with experienced site coordinators (who can mentor and share best practices)
 - Supplemental volunteer recruitment
 - Data collection and reporting

- Partner Organization
 - Provide a 10% cash match to funds provided. Match must be documented
 - Sub-recipient must use funds in adherence to VITA services and IRS guidelines
 - Each VITA site must have a Site Coordinator who can attend meetings and trainings prior to the tax season in addition to coordinating all site operations during the tax season
 - VITA sites need computers and printers with capacity to run tax preparation software and access the internet
 - VITA sites use TaxSlayer tax preparation software
 - TaxSlayer comes in an online version accessed through the internet (software is provided by United Way)
 - Technical support is provided by TaxSlayer and the UWGA team
 - Each site needs adequate space for preparing returns at computers and a client waiting or greeting area
 - Each VITA site is responsible for recruiting and managing their own volunteers
 - Commit to preparing at least 350 tax returns
 - Each VITA site determines their hours of operation and scheduling method (appointment or walk-in)

- Follow all privacy and security guidelines regarding equipment and taxpayer data
- Adhere to all quality site requirements established by the IRS (training is provided on quality site requirements)
- Attend conference calls, site coordinator meetings and trainings
- Attend additional trainings as required such as site coordinator bi-weekly calls
- Provide data as requested about program operations, volunteers and tax return results to United Way in a timely manner
- Ensure United Way has access to your TaxSlayer data base at all times
- Ensure site operation hours are regularly updated with United Way program staff and IRS
- Follow all end-of-season close out procedures as laid out by United Way and IRS

Funding Criteria

United Way will use the following criteria to evaluate proposals.

- Reaches and engages target population. Special consideration will be given to proposed sites in communities where there are currently no VITA or AARP tax sites and in communities with a low child well-being score
- Demonstrates the ability to deliver service(s) and measure agreed upon outcomes
- Delivers on best-practice strategies with fidelity and demonstrates success
- Meets or exceeds established benchmarks/outcome metrics (for returning sites)
- Coordinates effectively with other organizations to provide integrated services
- Expands capacity through leveraging funds and partnerships.
- Meets the grant match requirement
- Submits complete documentation in accordance with financial reporting requirements and/or Agency Financial Review

Financial Reporting Requirements

Financial Reporting Requirements are based on the size of partner’s overall budget. Described below are the four different categories and the relevant requirements.

Category A	Category B	Category C	Category D
Annual revenue less than \$100,000	Annual Revenue greater than \$100,000 but less than \$250,000	Annual Revenue greater than \$250,000 but less than \$500,000	Annual Revenue greater than \$500,000

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| <ul style="list-style-type: none"> • Internally prepared cash or accrual basis financial statements; Form 990, signed by executive director and/or board chair • current year budget | <ul style="list-style-type: none"> • Compilation prepared by a CPA; • Form 990; • Past 5 months internally prepared statements; • current year budget | <ul style="list-style-type: none"> • Review prepared by a CPA; • Form 990; • Past 5 months internally prepared statements; • current year budget | <p style="text-align: right;">United Way VITA RFA</p> <ul style="list-style-type: none"> • CPA performed independent audit; • Form 990; • Past 5 months unaudited statements; • current year budget |
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Required Materials:

The following requirements and issues are relevant to all organizations.

- CPA must be licensed and in good standing in the state of Georgia.
- All financial statements must show evidence of accounting principles in accordance with Generally Accepted Accounting Procedures and include full disclosures and appropriate notes for such things as leases, loans, investments, affiliated party transactions, contingencies, etc.
- Revenue includes cash and non-cash items.

Proposal Format

Each respondent is requested to submit its proposal in a MS Word document for ease of review with a minimum of repetitious material.

Page Limits

- Proposal Content – 5 pages
- Budget and Budget Narrative are not included in the page limits

Formatting Requirements

- Font size: 12 point
- Margins: At least one inch
- Text: Single-spaced
- Pages: Single-sided
- Page numbering: Centered at the bottom of each page
- In the header of each page: Name of Organization
- Please do not bind, hole punch, or place in protective covers
- No brochures or bound documents

Incomplete proposals or those not meeting proposal requirements will not be considered.

Section 1: Contact Information

Organization Name:
Address:
City, State, Zip
Phone number:
EIN number:
DUNS number:
Website:
CEO/Executive Director Name:
Title:
Phone number:
E-mail address:

Section 2: Host Site Partners

List all of the other organizations with whom you plan to partner on this project. Include a sentence or two about the role of each partner in this effort. Please also include a point of contact along with their email address and phone number.

Section 3: Work Plan

Please describe your organization's plan to integrate the Volunteer Income Tax Assistance (VITA) program into your operations. Include how you will conduct outreach to your target population and strategies for recruiting and retaining volunteers.

- A specific description of the population/people you plan to serve.
- How will hosting the VITA program impact the target population and improve their ability to become more financially stable?
- Describe the plan for integrating VITA into your operations? What best practices will be utilized?
- Detail the communications, marketing and outreach strategies that will be used to engage the target audience as well as recruit volunteers.
- Describe the qualifications and experience of the person who will be serving as the Site Coordinator.
- Describe the plan for site operations and the number of returns you anticipate completing.
- What additional financial stability services (if any) will be provided to site clients?

Section 4: Budget

A. Line Item Budget

Provide a line-item budget for your project using the template below or your own template, followed by a budget narrative explaining each line item in detail. Grant funds may only be used in accordance with Federal IRS guidelines. Below are examples of acceptable uses of grant funds.

- Site Operations and volunteer management (this DOES NOT include pay for tax preparers)
- Creation and distribution of marketing and outreach materials for your site(s)
- Recruiting and training volunteer tax preparers and others to staff free tax preparation sites
- Site supplies such as paper, pencils/pens, staplers, ink cartridges, etc.
- Rental or purchase of computers, printers, and other equipment needed to successfully complete and E-File tax returns
- Grant funds cannot be used to buy snacks or food for volunteers and/or taxpayers

Item	Grant request
Site Operations and volunteer management	
Marketing	
Technology	
Supplies	
Total Grant Request	

B. Budget narrative (up to one page in length)

1. Site Operations and volunteer management
Grant funds cannot be used to pay for tax preparation.
2. Marketing
The coalition provides overall marketing. Sites are encouraged to use targeted marketing techniques.
3. Technology

Provide the cost of any technology that will be needed to implement the VITA program.

4. Program supplies and expenses

May include costs such as paper and general office supplies.

5. Please list non United Way funding sources in your budget narrative.

C. Grant Match

Partners must provide a minimum 10% cash match. For example if your grant award is \$1000.00, you must have at least \$100.00 from your own funding source (operating funds, nonfederal grants, donations etc.) The grant match can be used to purchase snacks for volunteers.

- Please provide the source and amount of the match
- Please identify any in-kind contributions that are being made to the project. Documentation for in-kind contribution must describe the:
 - type of match,
 - method used to determine value, and
 - calculation