
How to Host a Volunteer Income Tax Assistance (VITA) Site

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IRS - SPEC

- **Stakeholder**
 - **Partnership**
 - **Education**
 - **Communications**
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Three SPEC Components



- Tax Awareness and Education
 - Tax Return Preparation
 - Financial Literacy
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Publication 4396A – Partner Resource Package

- Overview and Policies
 - IRS Site Management
 - Quality and Electronic Filing
 - Outreach
 - Emerging Initiatives
 - Partner Resource Center
 - Contacts
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Various Publications



- Coming Together to Strengthen Communities
 - Coming Together to Strengthen Employers,
Employees and Communities
 - Community Based Free Tax Preparation
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Why Host a VITA Site?

- Brings dollars and resources to your community
- Provides volunteers with valuable skills and insight
- Satisfies community outreach goals
- Promotes tax understanding
- Provides financial education and asset building opportunities



As a host you would:

- Plan, organize and supervise the site
 - Market and promote the program
 - Provide free tax assistance, accurate return preparation and quality service
 - Adhere to quality and operation standards
 - Meet certification requirements
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The IRS would provide:



- Tax law expertise and technical assistance
- Free software for tax preparation
- Training materials
- Data on EITC (Earned Income Tax Credit) and other statistics
- Marketing materials
- Access to local and national partnership networks and models
- Year round communication



Grant Objectives:

- Provide funds to enable VITA programs to extend services
- Increase the capacity to file returns electronically
- Heighten quality control
- Enhance volunteer training
- Improve accuracy rate of return preparation



Grant Information:

- Application period from June first to mid-July
 - Grants are reviewed mid-July to end of October
 - Notification occurs in October/November
 - Funds available in December
 - Current grant period runs from 7/01/09 to 06/30/10
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To Qualify for a Grant, you must be classified as:

- A non-profit organization tax exempt under Internal Revenue Code Section 501, or
- A state or local government agency, or
- A regional, statewide or local coalition with one lead organization that meets one of the above criteria

Continued...

To Qualify for a Grant:

- You must also be tax compliant at the time of application
 - Filing all required returns for the last 5 years and payment of all federal taxes
 - Not be debarred or suspended from Federal contracts, grants or cooperative agreements
 - Provide matching funds
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For More Information:

www.irs.gov

- ❑ Partner and Volunteer Resource Center
 - ❑ Partner and Volunteer Communication Center
 - ❑ VITA Grant
 - ❑ Become an IRS Partner to Help in Your Community
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Thank you!

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