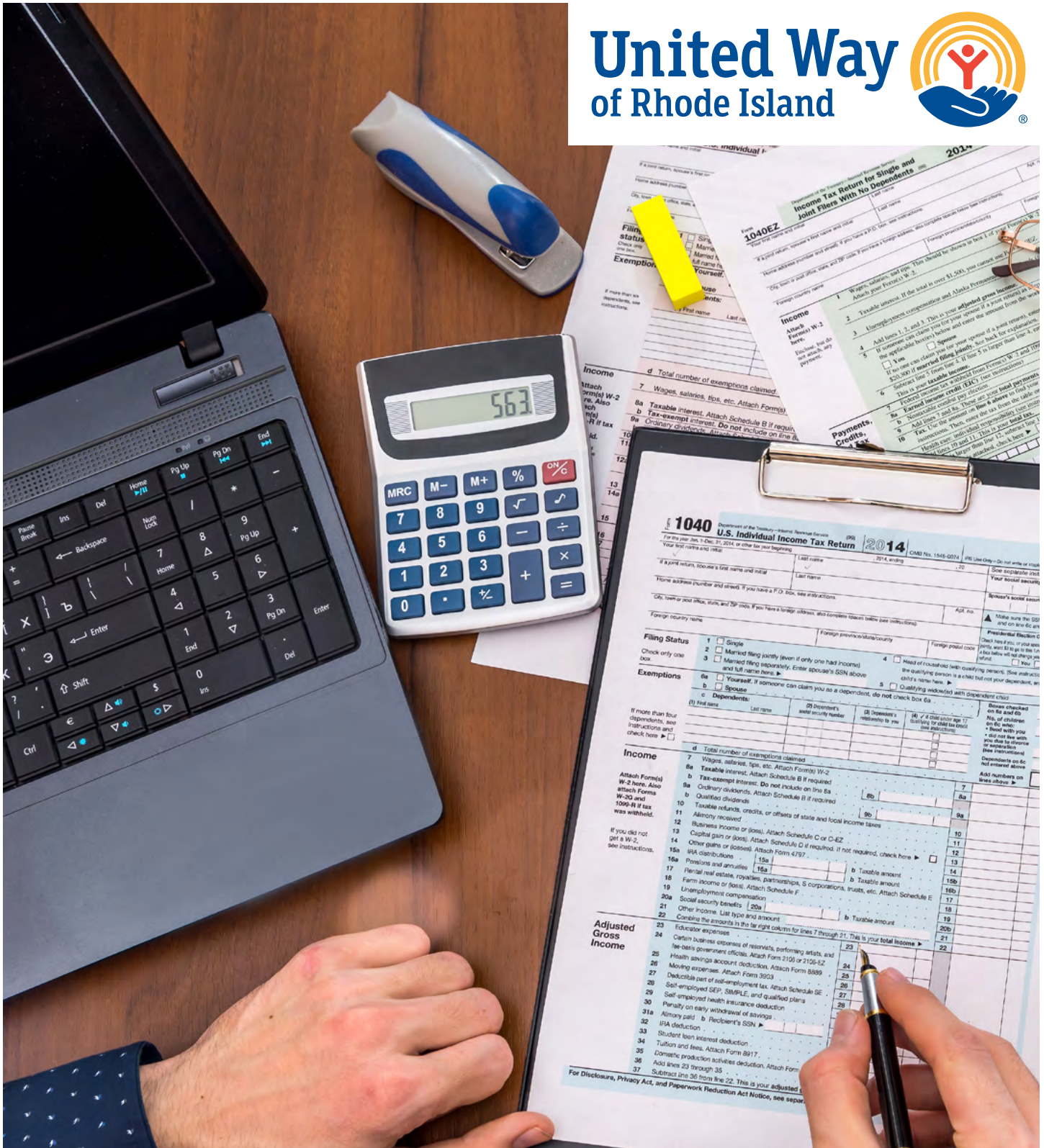


# United Way of Rhode Island



## VOLUNTEER INCOME TAX ASSISTANCE (VITA) PROGRAM REQUEST FOR PROPOSALS

## INTRODUCTION

United Way of Rhode Island (UWRI) has been a proud partner in the statewide Volunteer Income Tax Assistance (VITA) and Earned Income Tax Credit (EITC) Campaign since 2005. The VITA program provides low- and middle-income individuals and families with no-cost tax preparation. UWRI funding for sites is provided as part of a Lift United Pillar of the LIVE UNITED 2025 Strategic Plan. United Way invests in a continuum of services designed to create equity and income stability for individuals and families, including a focus on economic mobility, affordable housing and education.

## ELIGIBILITY

Organizations that:

- Can demonstrate a demographic need, willingness, and ability to provide VITA services according to the guidelines herein
- Can provide program and participant level outcome data using the UWRI on-line reporting system (program results, financial report, client characteristics, and geographic beneficiary information)
- Have a letter of determination of 501(c) 3 status from the Internal Revenue Service (IRS), or have a fiscal agent with 501(c) 3 status
- Meet United Way of Rhode Island's Community Accountability Standards
- Can provide a current Form 990 and the Form 990 from the prior year
- Can provide a copy of their most recent audit OR review and management letter

## CRITERIA

### VITA Site Program Requirements

#### VITA sites applying for UWRI funding must:

- Provide volunteer tax preparation services free of charge.
- Have a Site Coordinator.
- Have a robust strategy that includes recruiting volunteers (bilingual or multilingual whenever possible) to serve as preparers, quality reviewers, greeters, facilitators and other volunteer positions.
- Have at least 3 volunteers per site, per day of operation.
- Sites should be open at reasonable hours to accommodate the needs of the community members. Organizations should consider being open some evenings and weekends to accommodate working families.
- Have a complete system intake and tax preparation process (traditional and/or virtual/drop off) in place no later than January 2025 and start offering tax preparation services no later than the beginning of the third week of January. If sites would like assistance with appointment scheduling, the site coordinator should contact their Program Officer at United Way soon after receiving notification of funding decision.
- Have bilingual materials and interpreting services available where appropriate. Utilize and be certified in the TaxSlayer return preparation software provided by the IRS
- Agree to be part of and fully participate in all UWRI alliance-building efforts to discuss best practices and lessons learned and maintain regular communications with other funded sites.

Examples of this participation include, but are not limited to off-site tax preparation events, convenings, focus groups, kick-off events, surveys, etc.

- Agree to be part of regular check-ins with the United Way Program Officer, participate in meetings, inform UWRI of any challenges or site performance issues.
- Assist with EITC campaign awareness: coordinate materials distribution, outreach, and speakers, participate in EITC Awareness Day, etc.
- Have a robust taxpayer/community outreach plan to reach out to as many qualifying low-to-moderate-income families to educate about the credits available, such as EITC, CTC, etc. and to offer information on free tax preparation offered through the VITA program.
- Have a plan to annually increase the number of tax filers served.
- Meet the UWRI final reporting and data-sharing deadline
- Submit to UWRI Program Officer total volunteer numbers, hours and volunteer feedback forms by the end of the tax season.
- Not prepare (knowingly) false tax returns.
- File all eligible returns electronically (The IRS Provides the tax preparation software to use)
- Use the approved program forms provided by the IRS; sites must use intake forms distributed by the National Community Tax Coalition, IRS, or similar forms, for tracking participation.
- Collect anonymous demographic information for all clients
- Submit signed forms to the IRS
- Verify social security numbers to ensure that error rates are kept to a minimum
- Work closely with the local Stakeholder Partnerships Education & Communication (SPEC)/ IRS Territory Office and provide timely submission of all required forms to the local SPEC/IRS Office in keeping with IRS deadlines, such as:
  - Form 13715 - SPEC Site information Sheet (site hours of operation)
  - Form 13206 - Volunteer Assistance Summary Report. Listing of all volunteers working at the VITA sites and includes the dates the volunteer's received certification and their level of training.

### **Abide by the Quality Site Requirements**

- Certification - All volunteers must complete the Volunteer Standards of Conduct training and sign Form 13615. Tax law certification is required for all volunteers who answer tax law questions, instruct tax law, prepare or correct tax returns and/or conduct quality reviews of tax returns.
- Intake and Interview Process - All sites must use an intake and interview process, Form 13614-C provided by the IRS.
- Quality Review - All sites must use a quality review process, which includes 100 percent review of all returns.
- Availability of Reference Materials - All sites must have reference materials available for use Pub 4012, Volunteer Resource Guide, Pub 17, Your Federal Income Tax for Individuals, and Pub 3189, Volunteer e-file Administrator Guide.
- Volunteer Agreement - All individuals involved in the program must agree to follow the conditions outlined on Form 13615. In addition, agencies will be responsible for tracking the number of volunteers used and the number of volunteer service hours put in as part of this VITA initiative.
- Timely Filing - All sites must have processes in place to ensure every return is timely filed.
- Civil Rights - All sites must display information about Title VI of the Civil Rights Act I of 1964, as amended.

- Site Identification - All returns prepared must contain the correct and unique Site Identification Number (SIDN) provided by SPEC/IRS.
- Electronic Filing Controls - All returns prepared electronically must contain the correct Electronic Filing Identification Number (EFIN). Provided by SPEC/IRS
- Follow all Security, Privacy and Confidentiality Guidelines, as outlined in Pub 4299, Privacy and Confidentiality - A Public Trust, to ensure taxpayer information is provided reasonable protection and to reduce the threat of identity theft. This includes safeguarding equipment used to support the program.

## GRANT PERIOD

Funding for this two-year grant period is anticipated to be **October 2024 – May 2026**.

## FUNDING AVAILABILITY

The total amount to be awarded for VITA program sites is approximately \$275,000 for each of two years, contingent upon annual fund availability. Funding will begin in October of 2024 and be offered on a two-year cycle (tax seasons: 2024-2025 and 2025-2026).

## ANTICIPATED GRANT AMOUNTS

General Operating Support (GOS) grants may be requested by nonprofit agencies currently operating or planning to operate a VITA site. Single-site applicants may request up to \$10,000. A lead agency may submit a proposal on behalf of the Coalition and may add to the request an additional 10% of total funding to be used for administrative costs.

A specific project budget will not be required as part of the application, however, a description of the proposed use of funds will be required and information will be requested if the single site/coalition has other sources of revenue that contribute to the VITA program.

## DOCUMENTATION

- An IRS issued letter of determination of 501(c)3 status or have a fiscal agent with 501(c)3 status
- A current IRS Form 990
- A copy of most recent audit OR review and management letter

## REVIEW PROCESS

Proposals will be reviewed by a committee comprised of United Way of Rhode Island staff, volunteers, board members, members of our community investments committee and senior leadership. Using a [scoring rubric](#), the review committee will evaluate proposals and submit their recommendations to the Community Investment Committee.



## INFORMATION SESSION

United Way of Rhode Island staff will hold two virtual 60-minute information sessions on:

- Tuesday, September 10th at 9:00 AM
- Monday, September 16th at 3:30 PM

The information sessions will provide an overview of the VITA grant opportunity, a walk-through of the grant application platform, what to expect with respect to evaluation and learning, and an overview of the application process and anticipated timeline. There will also be time for Q&A.

Email Josselyn Velasquez-Florian at [josselyn.velasquez@unitedwayri.org](mailto:josselyn.velasquez@unitedwayri.org) to RSVP and to receive a link for the meeting.

**Please RSVP for one session only as the information shared on both will be the same.**

## APPLICATION SUBMISSION

Begin the application process:

- Visit our online grant submission portal to access the application.
- United Way of Rhode Island will only accept one proposal per agency.
- Please note that United Way of Rhode Island has transitioned to a new grantmaking platform. You must log-in onto our grant application platform to complete the application. If you are un-sure if your organization has an account or have forgotten the log-in credentials please do not create another account, but instead contact us for details.

### **Application Due Date**

Application is due **September 24, 2024, at 11:59 PM.**

United Way of Rhode Island may reach out to hold follow-up phone calls or virtual meetings with applicants, if necessary. Please be sure to include up-to-date contact information in the grant application.

The United Way of Rhode Island will notify applicants of funding decisions in October 2024.

## TIMELINE

September 5, 2024	UWRI Requests for Proposal released to public
September 24, 2024	Deadline to submit online proposals
October 2024	Applicants are notified of proposal funding decisions
October 2024	Contracts are developed, and funds disbursed in full to partners
October/December 2024	Selected applicants will participate in VITA meetings
January – April 2025	VITA season – selected applicants will participate in all of UWRI’s various VITA alliance-building efforts
May 2025	Volunteer and Partner Appreciation Event
June 2025	VITA Report is due (for year 1)

## QUESTIONS

Technical questions should be directed to Ruth Saah at [Ruth.Saah@unitedwayri.org](mailto:Ruth.Saah@unitedwayri.org)

General inquiries can be directed to Program Officer Josselyn Velásquez-Florián [Josselyn.Velasquez@unitedwayri.org](mailto:Josselyn.Velasquez@unitedwayri.org)