**Virginia CASH Campaign**

**2023-2024 EITC Grant Reporting**

**In order to capture tax season results and compile a complete picture of the success of the Virginia CASH Campaign, it is important that each coalition provide complete tax season data in a timely and complete manner.**

**Please note the following important dates. Please submit reports on time so there will be no negative impact on future funding requests.**

|  |  |  |
| --- | --- | --- |
| **Date** | **Event** | **Responsibility** |
| **January 31, 2024** | Report #1 due – includes activities from pre-tax season (or post 2022 season) | Submit data online – Microsoft Forms |
| **February 29, 2024** | Report #2 due (cumulative data) | Submit data online – Microsoft Forms |
| **March 31, 2024** | Report #3 due (cumulative data) | Submit data online – Microsoft Forms |
| **April 30, 2024** | Report #4 due (cumulative data) | Submit data online – Microsoft Forms |
| **May 20, 2024** | Final Coalition Report – data page that includes % comparison change and narrative | Submit data online – Microsoft Forms and PDF with data and narrative emailed to Carolyn at cspohrer@vacap.org |

**Name of Coalition:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_ Report #1 - due January 31, 2024**

**\_\_\_\_ Report #2 - due February 29, 2024**

**\_\_\_\_ Report #3 - due March31, 2024**

**\_\_\_\_ Report #4 - due April 30, 2024**

**Date submitted online:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Prepared by:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| **Data** | **Results** |
| # Free tax preparation sites |  |
|  |  |
| # Federal returns prepared (efiled) |  |
| # Federal returns (paper filed) |  |
| # FSA/FF/MFT Returns filed |  |
| # Virtual returns filed |  |
| # ITIN returns filed |  |
| # W 7 applications |  |
| Total # Primary/Secondary 60+ |  |
| Total # Prior Year returns |  |
|  |  |
| Total # tax returns filed |  |
|  |  |
| Total amount $ in federal refunds |  |
| Average $ refund amount |  |
| Tax prep savings ($250/per) |  |
|  |  |
| # Eligible for EITC |  |
| % EITC eligible |  |
| Average $ EITC refund |  |
| Total amount $ in EITC refunds |  |
|  |  |
| # Eligible Child Tax Credit |  |
| % Eligible for Child Tax Credit |  |
| Average $ CTC |  |
| Total amount $ CTC |  |
|  |  |
| # Eligible for Advanced/Additional CTC |  |
| % Eligible for Advanced/Additional CTC |  |
| Average $ Advanced/Additional CTC |  |
| Total $ Advanced/Additional CTC refunds |  |
| Total $ CTC + Advanced/Additional CTC refunds |  |
|  |  |
| # Eligible for Education Credits |  |
| Average amount $ Education Credit |  |
| Total amount $ Education Credits |  |
|  |  |
| # Requesting Direct Deposit |  |
| # Requesting Split Refund |  |
| Average $ Adjusted Gross Income |  |
| How does the Average Adjusted Gross Income of your tax clients compare to AGI of the larger community/area? |  |
|  |  |
| # Virginia returns prepared |  |
| Total amount $ Virginia Refunds |  |
| Total amount $ refundable EITC Virginia |  |
|  |  |
| Relating to TANF: |  |
| # Clients with child under age 18 in the home |  |
| # Clients whose income falls below 200% of poverty |  |

**\_\_\_\_ Report #1 due January 31, 2024**

**\_\_\_\_ Report #2 due February 29, 2024**

**\_\_\_\_ Report #3 due March 31, 2024**

**\_\_\_\_ Report #4 due April 30, 2024**

**Outreach and Marketing**

1. **How do you market or advertise your VITA services? Has the marketing and/or advertising changed during the course of the tax season?**
2. **What populations do you target for VITA?**
3. **List newspaper articles/links/media: (please forward to Carolyn as they are published):**

|  |  |  |
| --- | --- | --- |
| **Name of paper/website** | **Date published** | **Link** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Staff and Volunteer Hours**

1. **Briefly describe your program structure regarding staff and volunteers. Who does what and how are roles defined? (Full time/part time, full time during tax season, other duties in addition to VITA)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Position** | **How many** | **Hours** | **Value of Volunteer time** |
| **Paid VITA staff** |  |  |  |
| **Paid VITA volunteers**  **(ie site coordinators)** |  |  |  |
| **VITA volunteers** |  |  |  |
| **Additional positions (volunteer or paid)**  **to help run your VITA site)** |  |  |  |

**Final Coalition Report**

**Due May 20, 2024**

**Be sure final data results is on both Teams Forms and in the narrative for the final report, along with % comparisons over last tax season. Final coalition report should include the following sections. Any omissions or failure to follow this outline may impact future funding.**

1. **Cover letter with Summary**
2. **Final Coalition Data Results- Change from last year column must be completed with quantifiable results, % change**
3. **One sample copy of support letters written to members of Virginia’s General Assembly thanking Senators and Delegates for funding the EITC grant program and continued support.**
4. **As you prepare your final tax season narrative, please refer to your Fall 2023 grant application. You should include separate sections for each of the following:**
   1. **List of the specific goals you submitted in the fall 2023 grant application; did you meet those goals; why or why not?**
   2. **Did your program change during filing season; how and why?**
   3. **Relate a couple of relative success stories from the tax season (volunteer or client related)**
   4. **Challenges and how you overcame them**
   5. **Describe any unique community collaborations or partnerships**
   6. **Elected official visits/involvement/support**
   7. **Volunteer recognition**
   8. **Best Practice (what do you consider to be the best aspect of your program?)**
   9. **Measurable Objectives for next year (number or %)**
   10. **If you were to receive additional funding from the General Assembly, how would you use those funds? Please be specific.**
   11. **Is this a program that is recognized in the community?**
5. **Final Budget (how did you use the VACAP EITC grant funding, please be specific)**
6. **List of newspaper articles/websites (this should be a complete list of what you have compiled each month).**
7. **Staff and Volunteer hours**
8. **Outreach stats and successes**
9. **Photos (do you have a signed release?). Please include copies of photos in the report and email jpegs of photos to** [**cspohrer@vacap.org**](mailto:cspohrer@vacap.org)
10. **Is there anything else you would like to add about your VITA program?**

**Final Coalition Results - 2023 Tax Season**

|  |  |  |
| --- | --- | --- |
| **Data** | **Results** | **% Change from last year** |
| # Free tax preparation sites |  |  |
|  |  |  |
| # Federal returns prepared (efiled) |  |  |
| # Federal returns (paper filed) |  |  |
| # FSA/FF/MFT Returns filed |  |  |
| # Virtual returns filed |  |  |
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| # W 7 applications |  |  |
| Total # Primary/Secondary 60+ |  |  |
| Total # Prior Year returns |  |  |
|  |  |  |
| Total # tax returns filed |  |  |
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| Total amount $ in federal refunds |  |  |
| Average $ refund amount |  |  |
| Tax prep savings ($250/per) |  |  |
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| # Eligible for EITC |  |  |
| % EITC eligible |  |  |
| Average $ EITC refund |  |  |
| Total amount $ in EITC refunds |  |  |
|  |  |  |
| # Eligible Child Tax Credit |  |  |
| % Eligible for Child Tax Credit |  |  |
| Average $ CTC |  |  |
| Total amount $ CTC |  |  |
|  |  |  |
| # Eligible for Advanced/Additional CTC |  |  |
| % Eligible for Advanced/Additional CTC |  |  |
| Average $ Advanced/Additional CTC |  |  |
| Total $ Advanced/Additional CTC refunds |  |  |
| Total $ CTC + Advanced/Additional CTC refunds |  |  |
|  |  |  |
| # Eligible for Education Credits |  |  |
| Average amount $ Education Credit |  |  |
| Total amount $ Education Credits |  |  |
| **Data** | **Results** | **% Change from last year** |
| # Requesting Direct Deposit |  |  |
| # Requesting Split Refund |  |  |
| Average $ Adjusted Gross Income |  |  |
|  |  |  |
| How does the Average Adjusted Gross Income of your tax clients compare to AGI of the larger community/area? |  |  |
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| # Virginia returns prepared |  |  |
| Total amount $ Virginia Refunds |  |  |
| Total amount $ refundable EITC Virginia |  |  |
|  |  |  |
| Relating to TANF: |  |  |
| # Clients with child under age 18 in the home |  |  |
| # Clients whose income falls below 200% of poverty |  |  |

**Final Report**

**Outreach and Marketing**

1. **Was your marketing/advertising for VITA effective? Why or why not? (Use data)**
2. **List newspaper articles/links/media (insert pages as needed):**

|  |  |  |
| --- | --- | --- |
| **Name of paper/website** | **Date published** | **Link** |
|  |  |  |
|  |  |  |
|  |  |  |
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**Staff and Volunteer Hours**

|  |  |  |  |
| --- | --- | --- | --- |
| **Position** | **How many** | **Hours** | **Value of Volunteer time** |
| **Paid VITA staff** |  |  |  |
| **Paid VITA volunteers**  **(ie site coordinators)** |  |  |  |
| **VITA volunteers** |  |  |  |
| **Additional positions (volunteer or paid)**  **to help run your VITA site)** |  |  |  |

1. **Did the program structure regarding staff and volunteers change at all during tax season? How and why?**

**Final Project Budget**

**(State Fiscal Year July 1, 2023 - June 30, 2024)**

|  |  |  |
| --- | --- | --- |
| **Budget Category** | **Request** | **Actual** |
| Rent/office space |  |  |
| Personnel (salary) |  |  |
| Fringe benefits |  |  |
| Travel |  |  |
| Technology (computers/printing) |  |  |
| Publicity |  |  |
|  |  |  |
| Web Design/Maintenance |  |  |
| Telephone/Internet |  |  |
| General office supplies |  |  |
| PPE |  |  |
| Mailing costs |  |  |
|  |  |  |
| Training |  |  |
| Volunteer recruitment |  |  |
| Volunteer food |  |  |
| Volunteer recognition |  |  |
|  |  |  |
| Conferences |  |  |
| Financial Education services |  |  |
|  |  |  |
| Indirect Costs (10% or less) |  |  |
| Other (define) |  |  |
| **Total** |  |  |