

1. A few notes about the Application (READ CAREFULLY BEFORE PROCEEDING)

Welcome! We appreciate your interest in the Savings Bond pilot for Tax Season 2010.

This application allows you to apply for a maximum of 5 tax sites.

For each tax site being considered, you will need to complete FOUR sections:

- 1) VITA Sponsor Organization contact information.
- 2) Tax site contact information.
- 3) Detailed site information
- 4) Site narrative section

Each of the above sections appears on a separate page of the application.

After you complete the final section for each tax site, you will be asked if you would like to apply for another site.

Fields with an asterik (*) are mandatory.

NOTE: You can go back and finish a partially completed application at any time while the application process is open, as long as you use the same computer and you do not exit the application by hitting the "Done" button at the end.

After September 21st 2009, the process will be closed, so you will not be able to access the application.

To return to a partially completed application:

- 1) Click on the SurveyMonkey web link from the same computer that you used to begin the application. You will be returned to the last page saved.
- 2) Information entered on the application is saved every time you click the NEXT button (at the end of a page or section). For this reason, it is best NOT to leave the application in the midst of an incomplete page or section.

Please feel free to call any one of us at D2D at (617)-541-9066 with any questions you may have, or e-mail Preeti Mehta at pmehta@d2dfund.org, Christina Kasica ckasica@d2dfund.org or Tim Flacke at tflacke@d2dfund.org

2. VI TA Sponsor Organization Contact Information

* 1. Enter the name of the VI TA Sponsor Organization

* 2. Enter the name and title of the main organizational contact

Name of contact

Title of contact

3. Enter the street address of the VI TA Sponsor Organization

Street Address

City, State and Zip

Code

* 4. Enter the main phone number for organizational contact named above

3. Site 1: Site contact information

* 1. Enter the name of the tax site being considered for the pilot

2. Enter the tax site address (if different from that of the VI TA Sponsor Organization)

Street Address

City, State and Zip
Code

* 3. Please enter the name and title of the main D2D contact for this site

Name of main D2D
contact

Title of main D2D
contact

* 4. Please enter the work phone number of the main D2D contact

5. Enter the e-mail address for the main D2D contact

4. Site 1: Detailed Site Information

1. Which Tax Wise version will the site use in Tax Season 2010

Tax Wise Desktop

Tax Wise Online

Other

Comments, if any:

2. Which of the following best describes internet access at the site:

All computers have internet access

Only a few computers have internet access

No internet access

3. Is there a waiting area at the site

Yes

No

Comments, if any:

4. Are posters allowed on the walls at this site?

Yes

No

Not Sure

5. Please enter the following information about clients served at this site in Tax Season 2009. NOTE: Please enter whole numbers only. DO NOT enter any non-numeric characters like \$ or % signs.

Number of clients served at this site

Number of clients using direct deposit

Average refund size

Average AGI

6. Enter the following ONLY if the data is known or easily available. PLEASE ENTER NUMBERS ONLY: DO NOT enter any non-numeric characters like \$ or % signs.

Number of clients on public assistance

Number or percentage of repeat clients

Number of un-banked or under-banked clients in Tax Season 2009

Number of clients that filed as "Head of Household" in Tax Season 2009

7. Enter the following information about staff and volunteers at your site. PLEASE ENTER NUMBERS ONLY: DO NOT any non-numeric characters like \$ or % signs

The number of paid staff persons that will staff the site

The number of volunteers that will staff the site

If known, the percentage of volunteers that return every year

8. Does the site manager have experience offering financial products at the site?

Yes

No

Don't know

9. If you answered Yes to the above question, for how many tax seasons?

10. When do you plan on conducting training for savings bonds? (check all that apply)

In the fall prior to tax season

In January just before tax season starts

During tax season

11. Do you plan to train your TAX PREPARERS to promote or process savings bonds?

Yes

No

Don't know

12. Which of the following staff/volunteer roles will play a part in the PROMOTING savings bonds? (check all that apply)

Greeter

Intake person

Asset Specialist/Cash Coach

Bond Coordinator

Tax Preparer

Quality Reviewer

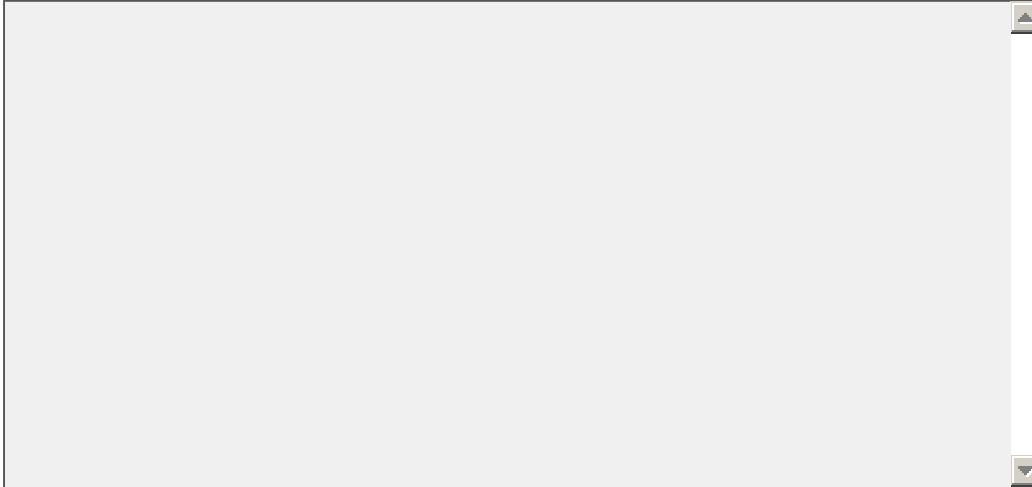
Site Manager/Coordinator

Other

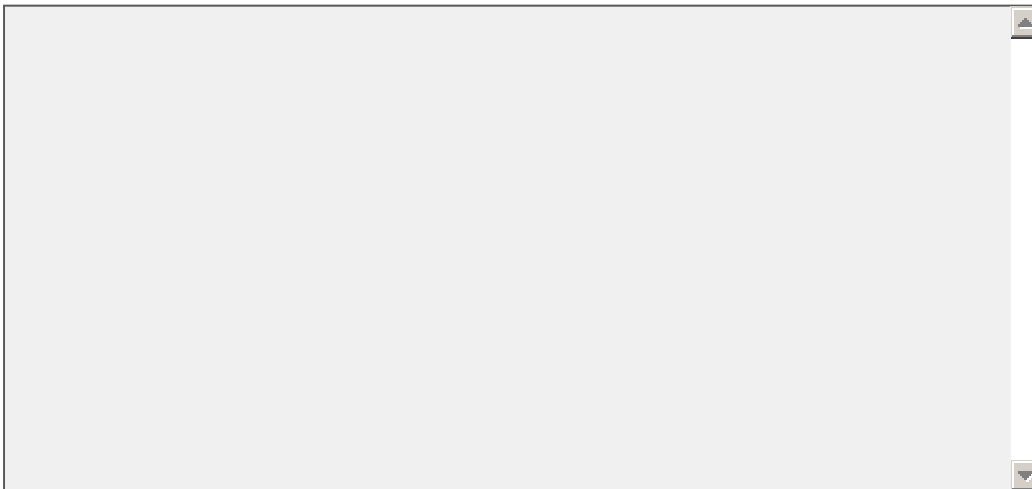
5. Site 1: Narrative Section

1. Briefly describe how you plan to ensure quality staff coverage for the bond program at this site? If possible, please indicate the individual(s) who would contribute to this effort, the hours he or she would work and their background/qualifications

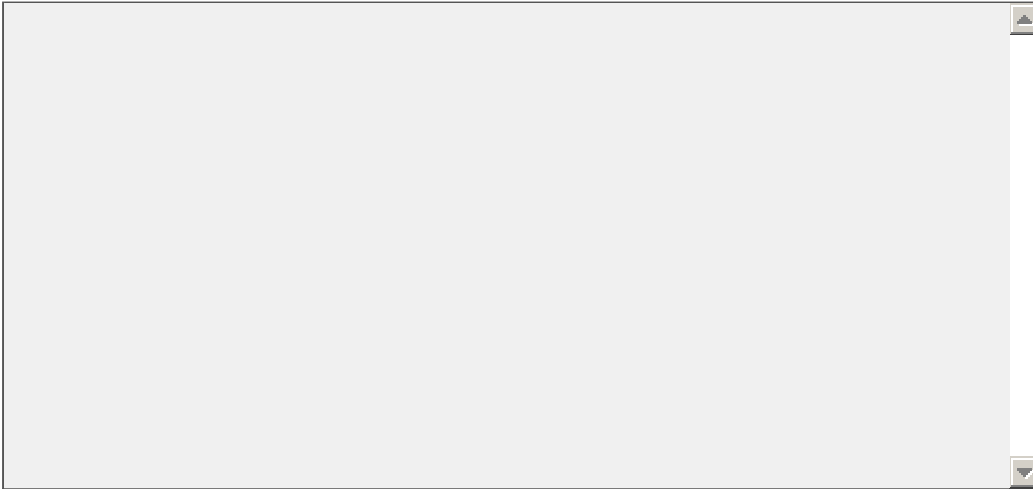
If you need more space feel free to add an attachment.



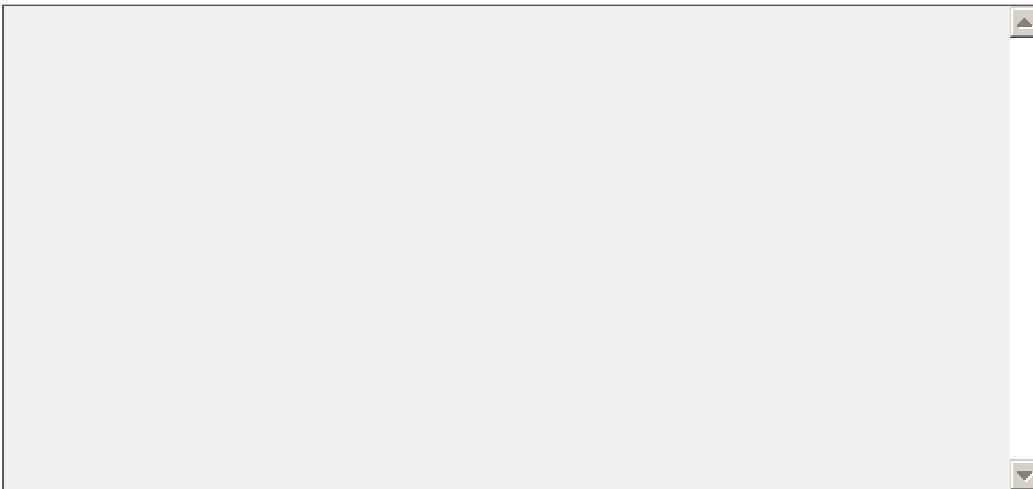
2. Briefly describe your plan for continued motivation of staff to promote products. If you need more space, feel free to add an attachment.



3. If you have offered financial products in the past, which ones did you offer? Which ones do you plan to offer in Tax Season 2010? If you need more space, feel free to add an attachment.



4. Has the site engaged in any policy advocacy efforts in the past? If yes, describe them. Are site personnel in contact with your federal representatives or senators? How often? Has anyone from your organization met with them on matters related to EITC, asset building policy or similar issues?

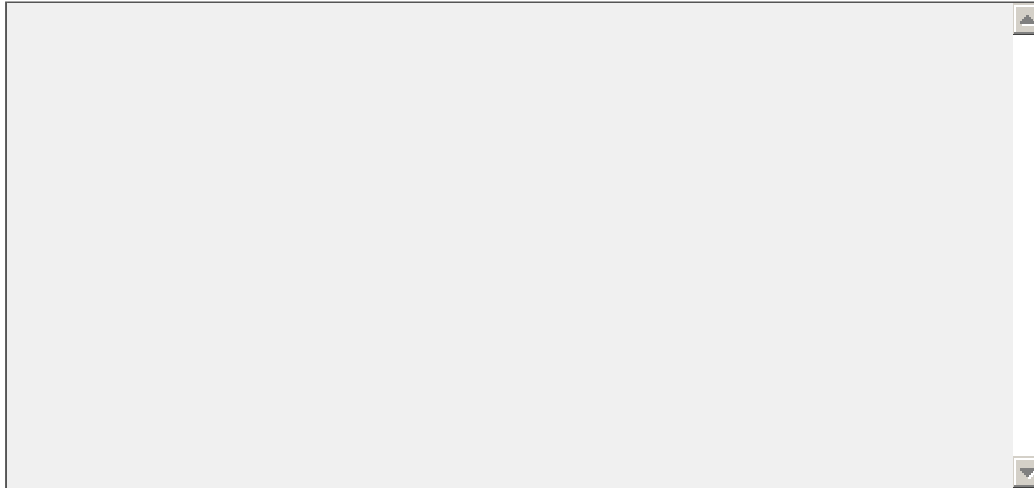


5. Please enter the Congressional district in which this site resides, and its Congressional representative. You can find this information by using the tool available at <http://capwiz.com/idanetwork/dbq/officials/>

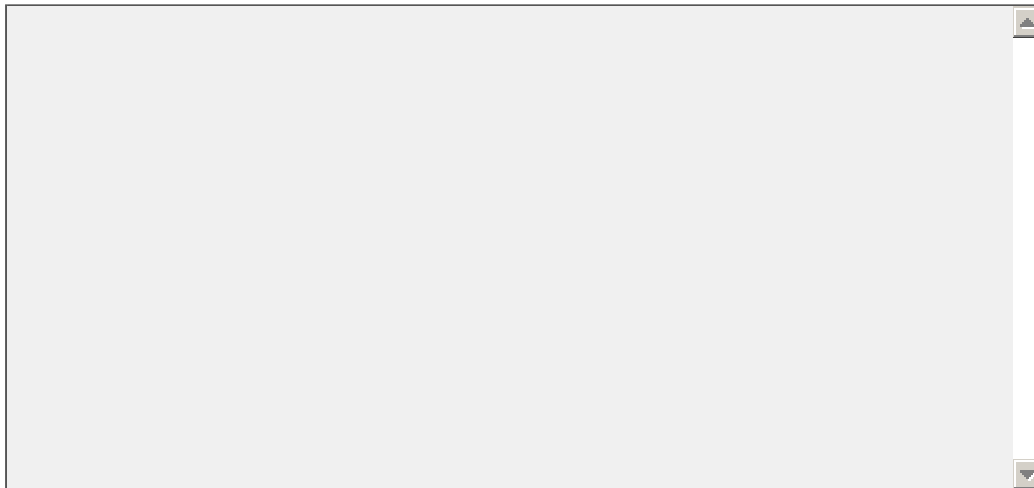
Congressional district

Congressional representative

6. Did this site have any media coverage last tax season? If so, please describe the kinds of coverage.

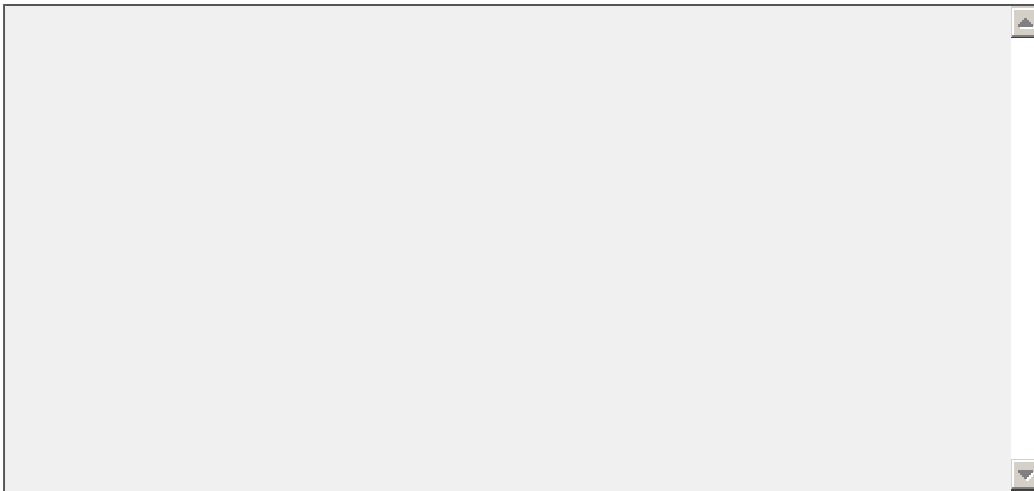
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7. How did the site interpret and implement IRS Regulation 7216 in Tax Season 2009

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8. For tax season 2010, D2D is offering prospective sites the opportunity to participate in one or more of three sub-pilots related to 1) a grass-roots community outreach strategy for savings bonds marketing, 2) testing the effectiveness of marketing collateral and 3) informing the development of an "R Bond" proposal. The RFP narrative describes each in a little more detail.

Please describe your site's interest in and/or capacity for participating in the above sub-pilots and indicate which one(s):



9. Do you wish to apply for the stipend to support the research objectives of the project and actively participate in advocacy activities?

Yes

No

* 10. You have reached the end of your application for the 1st tax site. Would you like to continue to apply for a second site to participate in the pilot?

Yes

No