



2023-2024 New Career and Technical Education State Student Organizations Informal Discretionary Competition (IDC) Due 11:59 p.m. CT, February 12, 2024

NOGA ID

Authorizing legislation

Strengthening Career and Technical Education for the 21st Century Act (PL 115-224)

This IDC application must be submitted via email to competitivegrants@tea.texas.gov.

The IDC application may be signed with a digital ID or it may be signed by hand. Both forms of signature are acceptable.

TEA must receive the application by **11:59 p.m. CT, February 12, 2024**.

Grant period from **March 18, 2024-August 31, 2024**

Pre-award costs permitted from **Not Permitted**

Application stamp-in date and time

Required Attachments

- 1. Excel workbook with the grant's budget schedules (linked along with this form on the TEA Grants Opportunities page)

See the Program Guidelines for for additional attachment information.

Amendment Number

Amendment number (For amendments only; enter N/A when completing this form to apply for grant funds):

Applicant Information

Organization CDN ESC UEI

Address City ZIP Vendor ID

Primary Contact Email Phone

Secondary Contact Email Phone

Certification and Incorporation

I understand that this application constitutes an offer and, if accepted by TEA or renegotiated to acceptance, will form a binding agreement. I hereby certify that the information contained in this application is, to the best of my knowledge, correct and that the organization named above has authorized me as its representative to obligate this organization in a legally binding contractual agreement. I certify that any ensuing program and activity will be conducted in accordance and compliance with all applicable federal and state laws and regulations.

I further certify my acceptance of the requirements conveyed in the following portions of the LOI application, as applicable, and that these documents are incorporated by reference as part of the LOI application and Notice of Grant Award (NOGA):

- LOI application, guidelines, and instructions
- Debarment and Suspension Certification
- General and application-specific Provisions and Assurances
- Lobbying Certification

Authorized Official Name Title

Email Phone

Signature Date

Shared Services Arrangements

Shared services arrangements (SSAs) are NOT permitted for this grant.

Statutory/Program Assurances

The following assurances apply to this program. In order to meet the requirements of the program, the applicant must comply with these assurances.

Check each of the following boxes to indicate your compliance.

- 1. The applicant provides assurance that program funds will supplement (increase the level of service), and not supplant (replace) state mandates, State Board of Education rules, and activities previously conducted with state or local funds. The applicant provides assurance that state or local funds may not be decreased or diverted for other purposes merely because of the availability of these funds. The applicant provides assurance that program services and activities to be funded from this IDC will be supplementary to existing services and activities and will not be used for any services or activities required by state law, State Board of Education rules, or local policy.
- 2. The applicant provides assurance that the application does not contain any information that would be protected by the Family Educational Rights and Privacy Act (FERPA) from general release to the public.
- 3. The applicant provides assurance to adhere to all the Statutory and TEA Program requirements as noted in the 2023-2024 New Career and Technical Education State Student Organizations Grant Program Guidelines.
- 4. The applicant provides assurance to adhere to all the Performance Measures, as noted in the 2023-2024 New Career and Technical Education State Student Organizations Grant Program Guidelines, and shall provide to TEA, upon request, any performance data necessary to assess the success of the program.
- 5. The applicant assures that any Electronic Information Resources (EIR) produced as part of this agreement will comply with the State of Texas Accessibility requirements as specified in 1 TAC 206, 1 TAC Chapter 213, Federal Section 508 standards, and the WCAG 2.0 AA Accessibility Guidelines.
- 6. The applicant provides assurance to adopt and adhere to TEA CTSO oversight policy. (See *TEA CTSO Oversight Policy* posted with this RFA)
- 7. The applicant provides assurance to Agree to abide by existing TEA CTSO grant guidelines, requirements, and performance measures, including non-profit (501 c3) status.
- 8. The applicant provides assurance to agree to not duplicate any of the nine existing state CTSOs or their services.
- 9. The applicant provides assurance to accept Perkins funding up to \$27,077.

Summary of Program

Provide an overview of the program to be implemented with grant funds. Include the overall mission and specific needs of the organization. Describe how the program will address the mission and needs.

The overall mission and specific needs of Beyond Careers is to embed our Volunteer Income Tax Assistance (VITA) free tax preparation program into more high schools in Texas. The program will address the mission and needs by continuing to build relationships with current schools we partner with and to expand the program to other school districts and schools throughout the State of Texas.

Beyond Careers Virtual Volunteer Income Tax Assistance (VITA) in partnership with the Internal Revenue Service- Stakeholder Partnerships, Education and Communication (IRS-SPEC) provides free tax preparation to taxpayers in the low-to-moderate income bracket get their tax returns prepared at no cost and refunds they are eligible for and savings in tax preparation fees will go toward building wealth for those taxpayers.

Beyond Careers Virtual VITA and its VITA Club has participation by students and teachers in activities of Career and Technical Student Organizations (CTSO) – DECA supported by Texas Education Agency (TEA) and the State Board of Education. VITA has recently been added to the approved curriculum of the TEA. Beyond Careers Virtual VITA is embedded in CTSO-DECA- at Northside High School and integrates our new VITA Clubs programs that develop student leadership, personal growth, and career success through a well-rounded practical approach to learning. VITA does integrate career and technical education, Texas Essential Knowledge and Skills, and CTSO activities. The VITA Club at Northside High School through Beyond Careers VITA is a career and technical student organization. The VITA Club provides the skills for engagement in career and technical education activities as an integral part of the instructional program at the local level. VITA does not duplicate any of the nine existing state CTSOs or their services.

Beyond Careers Virtual VITAs career ready education opportunities through such activities as the use of TaxSlayer, online accounting and tax industry-style client portal, to provide education for students to become an IRS-Certified volunteer tax preparer at the Advanced level. TaxSlayer, online accounting and tax industry-style client portal, virtually introduces students to technology used in business, industry, and work together in groups for the technical skills that enhance students' careers long-term.

Qualifications and Experience for Key Personnel

Outline the required qualifications and experience for primary project personnel and any external consultants projected to be involved in the implementation and delivery of the program. Include whether the position is existing or proposed.

Title and Responsibilities of Position	Required Qualifications and Experience
Program Manager, Develop and implementation of the program, technical training, building partnerships.	Masters Degree. Administrator of Beyond Careers VITA for 14 years. An IRS-Certified tax preparer and quality reviewer. Conduct technical training necessary for volunteers to become IRS-Certified.
Administrative Assistant, work with Program Manager and Project Coordinator to facilitate program.	Help coordinate program between Beyond Careers and volunteers, for 14 years. Assist with marketing/advertising, preparation of reports, other duties as assigned.
Instructional/Project Coordinator. Work with Program Manager on implementation of program.	Continuous training for student teams, guidance and assistance with the tax preparation process, quality reviews, and mentoring of students.

Goals, Objectives, and Strategies

Describe the major goals/objectives of the proposed program. What activities/strategies will be implemented to meet those goals/objectives?

The major goals/objective of the proposed program is the implement Beyond Careers Virtual VITA program at high schools and have a VITA Club for each school. We are partnering with the Northside High School teacher in the DECA program to embed Beyond Careers Virtual VITA into their curriculum for the VITA Club. DECA is recognized as a CTSO. Because VITA is now on the Texas Education Agency (TEA) approved curriculum list, the school will be able to use the program for its Accountability Rating, the students gain an Industry Based Certificate, technical training to become IRS-Certified, and the taxpayers in the community are able to get free tax preparation services. Even though ECHS does not have the structure for the VITA program approved by TEA, they do provide Beyond Careers regular Virtual VITA program at their schools and in the community. The ECHS have three years of experience and can provide peer-to-peer mentoring to the students at Northside VITA Club. In 2024, the ECHS VITA Club developed a 7-minute video on the VITA Intake process to provide to the students in the Northside VITA Club.

To expand our efforts, Beyond Careers has contacted multiple organizations in the community to collaborate on providing the IRS-SPEC VITA program for the upcoming tax season. We are continuing to build partnerships at schools and organizations that work directly with that target population in the community. Through their community service, the students can earn extra GPA points that normally comes with AP or dual credit courses. These students have completed their technical training to become IRS-Certified to continue with the ECHS VITA Club for the 2023 tax season. These students, along with their instructor, have recruited new students and are mentoring those students to become part of their ECHS VITA Club.

Performance and Evaluation Measures

Describe the performance measures identified for this program which are related to student outcomes and are consistent with the purpose of the program. Include the tools used to measure performance, as well as the processes that will be used to ensure the effectiveness of project objectives and strategies.

Performance measures identified for this program which are related to student outcomes and are consistent with the purpose of the program are: (1) Federal income tax returns that are electronically filed and verified as “ Accepted ” by the IRS upon filing by Beyond Careers ’ administrator, (2) State income tax returns that are electronically filed and verified as “ Accepted ” by the specific state upon filing by Beyond Careers ’ administrator, total refunds, total EITC and other tax benefits. The total number of tax returns completed is multiplied by \$250 to determine the amount of savings in tax preparation fees.

The tools Beyond Careers VITA uses to measure performance are generated in the Management Reports through TaxSlayer, online accounting and tax industry-style client portal, using Calculation Site Production reports. Trainers will also be IRS-Certified volunteers in the community and experienced in working with Beyond Careers ’ VITA. The technical training courses taught in Link & Learn include tax law, electronic filing, electronic tax preparation software, and site coordinator technical training. The trainers will make sure that all volunteers who answer tax law questions, instruct tax law, prepare or correct tax returns, and/or conduct quality return reviews are prepared to take the IRS test and become IRS-Certified volunteer roles such as tax preparer, Intake and expanding to other roles they are qualified to participate in.

Budget Narrative

Describe how the proposed budget will meet the needs and goals of the program, including for staffing, supplies and materials, contracts, travel, etc. If applicable, include a high-level snapshot of funds currently allocated to similar programs. Include a short narrative describing how adjustments will be made in the future to meet needs.

An attached budget is from the Texas Financial Education Endowments (TFEE) grant that Beyond Careers previously applied for. This program expanded to include VITA sites in multiple locations and having a combination of in-person and virtual VITA for the communities we would serve. The TFEE proposed budget would meet the needs and goals of the Combination program (in-person and virtual tax preparation), including staffing, supplies and materials, contracts, travel, etc.

Because our program is 100% virtual for the VITA Clubs, a big portion of the items proposed in the TFEE budget, including for staffing, supplies and materials, contracts, travel, etc. are not applicable for this virtual program. Since this is the first year of seeking funding specifically for the VITA Clubs at the schools that are eligible for the VITA program on the TEA Approved Curriculum list, we do not have a previous budget. Once we have completed the program for the funding for the VITA Club participating under the TEA Approved Curriculum list this year, we'll be able to determine adjustments will be made in the future to meet needs.

Program Requirements

1. Describe the vision and mission of the proposed CTSO, how the proposed CTSO will support Texas CTE programs of study, the proposed level of statewide presence, and any national level affiliation.

The vision and mission of the proposed CTSO is to embed Beyond Careers VITA into the DECA (CTSO) program at Northside High School. The proposed CTSO will support Texas Career and Technical Education Programs (CTE) programs. VITA falls under the Accounting and Financial Services program of study teaches CTE learners how to examine, analyze, and interpret financial records.

Through this program of study, students will learn the skills necessary to perform financial services, prepare financial statements, interpret accounting records, give advice, or audit and evaluate statements prepared by others. This program of study will also introduce students to mathematical modeling tools.

Beyond Careers VITA recruits and train students to assist with VITA virtually. Students take the technical online independent study virtually to introduce them to technology used in business and industry and worked together in groups for the technical training that enhances students' careers long-term. Not only will this opportunity provide economic strength to those utilizing our free tax preparation, but it will allow students to graduate with an IRS-SPEC tax certification giving them real world experiences and career ready skills preparing them for post-secondary education and/or employment.

Technical training includes all exams required by the IRS-SPEC to certify and become an IRS-Certified volunteer are taken after using practice lab software online technology through Beyond Careers VITA. Guided practice on the designated TaxSlayer, online accounting and tax industry-style client portal, is given to ensure that all students are familiar with the software prior to volunteering. Exams required for certification and on the approved IBC list provided by TEA, are provided at no cost.

Program Requirements, cont'd.

2. Describe a plan for sustainability after the first year of funding.

Beyond Careers has demonstrated experience in the delivery of Earned Income Tax Credit (EITC) outreach to underserved taxpayers in the LMI bracket, through this partnership. Beyond Careers was awarded a 3-year Federal grant more than 9 years ago to conduct EITC outreach and provide third party marketing materials throughout the community. We have also received the Volunteer Income Tax Assistance (VITA) grant for the past 3 years.

We have applied for and received the new VITA grant for Year 1 of a 3-year grant. By applying and being approved for the VITA grant, we expect to increase our budget for the 2023 tax season. In addition, we anticipate receiving an annual grant from Comerica Bank and CenterPoint Energy in Houston, TX.

We anticipate receiving individual contributions. Our program has successfully used limited funds from small grants, business and individual contributions, in-kind donations and IRS-Certified volunteer hours to bring this program to the communities we serve.

Beyond Careers will also continue to seek funding and grants from foundations, and contributions from businesses and individuals who see the benefit of the program in the communities we serve. We will enhance our program through matching in-kind contributions from our partners for such things as publicity, space, computers, internet, and volunteer hours, which will result in lower program costs to implement our program each year for the future.

3. Describe a plan on how they will conduct leadership activities for student membership.

Beyond Careers partners with the school's assigned designated teacher or instructor who are the liaison for the program. Our program has 100% virtual tax preparation using TaxSlayer, online accounting and tax industry-style client portal. This involvement will give the student knowledge of the workforce as well as enhance and develop their soft skills.

Students earn an industry-based certification approved by TEA earning the school district credit under career readiness.

The plan and outline for the leadership development training will include mentoring by experienced volunteers with a minimum of one year participation in Beyond Careers Virtual VITA program. Experienced students become Team Leaders after their first year of participation. We project the number of student participants to increase a minimum of 20% per year.

Team Leaders: (1) develop and narrate Intake training video for new volunteers. (2) teach new volunteers how to use the Government-Affiliated tax website, IRS TaxSlayer, online accounting and tax industry-style client portal. (3) Create flyers in English/Spanish for Beyond Careers VITA program. (4) Recruit students in their sophomore and junior years to take the place of those students currently in their school's VITA Club. (5) Provide peer-to-peer technical training to high school students at multiple schools.

Some students have volunteered with Beyond Careers Virtual VITA for three years. They began by entering the data for Intake. They mastered the Intake process and moved into the tax preparation phase. For their second year with the program, they had dual roles of tax preparer and Team Leader. As a Team Leader, they helped new volunteers understand how to file clients' tax returns and check the client's documents provided. For the third year, these students have multiple roles Site Coordinator, Team Leader, Quality Reviewer, and tax preparer.

Program Requirements, cont'd.

4. Describe a plan to include leadership opportunities for student members, including positions at local, district/area, and state levels.

Having VITA listed on the student's resume has been shown to get the attention of potential employers, especially in the financial industry, and some of those students have reached out to the organizations where they volunteered with VITA and said they were highly considered for interviews for potential job and career opportunities with these employers.

As our program expands, we would like to offer volunteer part-time positions at a local, district/area, and state levels.

As we are already reaching out to multiple school districts in areas in Texas, as the relationships are developed, we will be able to expand to a larger area.

Because our VITA Clubs at the high schools are 100% virtual, we will be able to expand to multiple areas in Texas as we continue to build relationships with the high schools.

This expanded program would be for those students who have been with the VITA Clubs at their school and who want to continue to volunteer with Beyond Careers.

Contingent upon funding, we would like to have some paid internships for those students who have been exceptional in their activities with their VITA Club through Beyond Careers.

5. Describe a plan for how you will use resources providing recognition and scholarship opportunities for student membership.

Beyond Careers reaches out to Elected Officials to provide Proclamations to the schools partnering with Beyond Careers VITA to give recognition to the schools and introduce the students to their elected officials.

Previously, U.S. Congresswoman Sheila Jackson Lee did provide a Proclamation to one of our partnering schools, East Early College High School. Key students are recognized on Beyond Careers' website.

We encourage the schools to also include the students on their website. Every five years of volunteering with VITA, a Certificate of Appreciation to provided. This is an incentive for volunteers to continue with the program for many years.

There are no scholarship opportunities for student membership as the schools we are working with require community service going towards the student's graduation requirements.

For those outstanding students, Beyond Careers does provide Letters of Recommendation for their applications for institutions of higher education as well as scholarship and grant opportunities.

Program Requirements, cont'd.

6. Describe a plan for how you will support local chapter efforts to increase student engagement, increase memberships, and increase inclusion of special populations CTE students.

We have reached out to the Houston Independent School District (HISD) letting them know about Beyond Careers ' VITA program and implementation of the program two of their high schools where we began VITA Clubs for 2 Years at Northside High School and 3 Years at East Early College High School. Students participating in the VITA Clubs do not pay any membership fees.

Northside High School can participate in the Texas Education Agency (TEA) approved certification on the Industry Based Certifications (IBC) list for public school accountability, meeting the TEKS requirements. This accountability counts towards the student ' s college, career and military readiness (CCMR). Beyond Careers VITA is embedded in the DECA teacher ' s class in which DECA is a CTSO. The teacher's goal is to increase the number of classes at Northside High School to become part of the VITA Club and participate in the TEA CTSO. In partnership with the DECA instructor at Northside High School, Beyond Careers VITA agrees to have a direct plan on how we will report on participating students and their race, ethnicity, and gender.

Beyond Careers has reached out to HISD about its CTE programs at high schools and that the VITA program is now on the TEA approved curriculum list. The information Beyond Careers provided was how we have implemented our VITA program at HISD schools, and the program is even more enhanced because it is on the TEA approved curriculum list.

Beyond Careers has applied to be on the HISD Vendor ' s list and our application is pending in the HISD Legal Department. Because of the major changes at HISD, the process is taking longer than usual, but we anticipate getting a positive response and having our program listed on the HISD Vendor list this year.

7. Describe a plan for how you will demonstrate commitment to recruiting and serving special population students and non-traditional students.

To recruit volunteers, Beyond Careers sends our volunteer flyer to our partnering high schools, community organizations, members of the community, businesses, and other appropriate entities in order to leverage the resources for free tax preparation.

We provide a customized flyer for student volunteers to the school's instructors and teachers who will refer their students to Beyond Careers VITA and these instructors and teachers have the option to allow students to get extra credit on their grades. Team Leaders recruit students at their schools who are in their sophomore and junior years to take the place of those students currently in their school's VITA Club. By new students becoming a member of the VITA Club, this will continually connect current students with the new students. With current students working on teams with new students, this is the opportunity for peer-to-peer mentoring and increase the membership from year to year.

For students who are not in a CTSO course, they can become an IRS-Certified volunteer individually and determine from their teacher or instructor if they can use their volunteering as extra-curricular activity. If nothing else, even if the student can ' t use their volunteering for school credit or extra-curricular activity, they will benefit from the program in their individual life. They will be able to promote the program to their community, families and other taxpayer ' s who would need to have their tax returns prepared at no cost.

We will recruit and train bilingual tax preparers. This will eliminate the barrier for taxpayers who only speak Spanish.

Program Requirements, cont'd.

8. Describe a plan for how you will support statewide efforts to increase student engagement, increase memberships, and increase inclusion of special populations CTE students.

Since VITA has recently been added to the Texas Education Agency (TEA) approved certification on the Industry Based Certifications (IBC) list for public school accountability, meeting the TEKS requirements, this is a great opportunity for the school as well as the student. This opportunity will allow students to graduate with an IRS-SPEC tax certification giving them real world experiences and career ready skills preparing them for post-secondary education and/or employment.

The objective of our initiative is to increase the number of students that certify in IRS-SPEC VITA Tax Certification, including train the trainer programs. Within VITA we provide technical training for the students and there is also peer-to-peer technical training/mentoring for current students who will help with technical training for the new students. This accountability counts towards the student's college, career and military readiness (CCMR) which plays a substantial role in all domains in high school and district ratings.

We have already begun reaching out to multiple school districts, since 2023, to recruit the schools and their students to participate in the CTSO and to let them know about the VITA program and its inclusion on the TEA approved curriculum list. This includes HISD, Fort Bend Independent School District (FBISD), Alief Independent School District (AISD) and other interested entities.

Because Beyond Careers Virtual VITA integrate career and technical education and its use of online accounting and tax industry-style client portals, we are able to include students from small and rural schools, as well as students from large and urban schools throughout the State of Texas. This includes efforts to increase the participation of students in nontraditional fields and students who are members of special populations such as those economically disadvantaged.

Appendix I: Amendment Description and Purpose (leave this section blank when completing the initial application for funding)

An amendment must be submitted when the program plan or budget is altered for the reasons described in the "When to Amend the Application" document posted on the [Administering a Grant](#) page. The following are required to be submitted for an amendment: (1) Page 1 of the application with updated contact information and current authorized official's signature and date, (2) Appendix I with changes identified and described, (3) all updated sections of the application or budget affected by the changes identified below, and, if applicable, (4) Amended Budget Request. Amendment Instructions with more details can be found on the last tab of the budget template.

You may duplicate this page

Amended Section

Reason for Amendment