

# Welcome!

**The webinar will begin shortly. Please mute your microphone.**

- We will begin at 1 p.m. It will be quiet until then.
- We recommend using a headset.
- If you cannot hear, turn on your computer speakers and adjust the volume.
- This webinar is being recorded.



## Grant Webinar for Fiscal Year 2024-25

Jessica Delcid | Grant Coordinator

October 18, 2023

# Introduction



Jessica Delcid  
Grant Coordinator

# Disclaimer

This presentation is for educational purposes only. It is meant to accompany an oral presentation and not to be used as a standalone document.

This presentation is based on the facts and circumstances being discussed and on the laws in effect when it is presented. It does not supersede or alter any provisions of Minnesota laws, administrative rules, court cases, or revenue notices.

If you have grant-related questions, call us at 651-556-3052 or 1-800-818-6871, or email [Volunteer.Grant.MDOR@state.mn.us](mailto:Volunteer.Grant.MDOR@state.mn.us).

# Today's Agenda

- Grant awards
- Reimbursement of grant funds
- Required Minnesota tax training
- Reporting due dates
- Site monitoring visits



# FY24-25 Grant Awards



30 Taxpayer Assistance Grantees

33 Tax Credit Outreach Grantees

# Taxpayer Assistance Grant Goals

## Expanding services:

- Increase multilingual volunteers
- Expand the availability of services, specifically in:
  - Greater Minnesota
  - Brooklyn Park
  - Brooklyn Center
  - North Minneapolis
  - Northeast Minneapolis
  - Tribal Reservations

# Tax Credit Outreach Grant Goals

Increase awareness and claims for eligible credits such as:

- Child Tax Credit
- Working Family Credit
- K-12 Education Credit
- Renter's Income Tax Credit
- Property Tax Refund



# Tax Credit Outreach Grant Goals

Increase awareness and claims in:

- Greater Minnesota
- Brooklyn Park
- Brooklyn Center
- North Minneapolis
- Northeast Minneapolis
- Tribal Reservations

Publicize and promote in additional languages, including:

- Spanish
- Hmong
- Oromo
- Somali

# Grant Awards and Expenses

- Lump sum
- Categories:
  - Equipment and accessories
  - Advertising
  - Salaries
  - Other

# Awards and Expenses: Taxpayer Assistance Grant

Eligible expenses include:

- Salaries
- Advertising
- Recruiting and training
- Training materials
- Equipment and accessories
- Other

# Awards and Expenses: Tax Credit Outreach Grant

Eligible expenses include:

- Salaries
- Advertising
- Digital content
- Targeted communication
- Promotional products
- Other

# Guidelines for Grant Expenses

- No gift cards
- Food and beverages only for **Taxpayer Assistance Grant**.
  - \$500 per organization per fiscal year
  - Itemized receipts

# Complete Grant Expense Guidelines

## Review the RFP

# Salary Funding

- Must be reasonable
- Cannot be used to pay volunteers who:
  - Conduct intake
  - Prepare tax returns
  - Perform quality review
  - Interpret



# Guidelines for Advertisements

Advertisements must:

- Be approved **before** promoting
- Be approved **each** grant period
- Include: “Service made available through a grant provided by the state of Minnesota”
- Be professional and accurate



# Incentives for Volunteers: Taxpayer Assistance Grant

## Incentives for recruiting volunteers:

- \$500 for food and beverages
- \$10 per volunteer for recognition
- Mileage reimbursement
- Certificates

# Disallowed Grant Expenses

## Disallowed expenses:

- Coffee machines
- Gift cards

# Complete Grant Expense Guidelines

## Review the RFP

# Grant Periods: Taxpayer Assistance Grant

## FY24 Grant Period

- October 1, 2023 (or when both parties sign the grant contract, whichever is later), through August 31, 2024

## FY25 Grant Period

- October 1, 2024, through August 31, 2025

# Grant Periods: Tax Credit Outreach Grant

## FY24 Grant Period

- October 1, 2023 (or when both parties sign the grant contract, whichever is later), through **June 30, 2024**

## FY25 Grant Period

- October 1, 2024, through **June 30, 2025**

# Reimbursement of Grant Funds: Taxpayer Assistance Grant

You may request reimbursement:

- When the progress report is due
- When the final report is due
- Before August 31

# Reimbursement of Grant Funds: Tax Credit Outreach Grant

You may request reimbursement:

- When the progress report is due
- When the final report is due
- Before **July 15, 2024**, for FY24
- Before **July 15, 2025**, for FY25

# Reimbursement of Grant Funds

- Reimbursement request expense tracking sheet
  - For each request
  - Mandatory
  - Available on our grant website
- Include supporting documentation





# Required Minnesota Tax Training: Taxpayer Assistance Grant

Choose one mandatory training webinar:

- Wednesday, December 13  
9 to 11:30 a.m.
- Monday, December 18  
5 to 7:30 p.m.
- Thursday, January 11, 2024  
Noon to 2:30 p.m.
- Each site must be represented

# Required Minnesota Tax Training: Taxpayer Assistance Grant

Choose one mandatory training webinar:

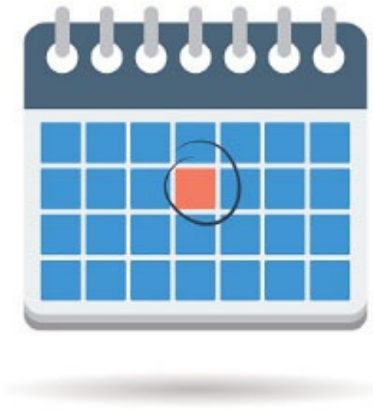
- Wednesday, December 20  
8:30 to 10 a.m.
- Tuesday, January 9, 2024  
5 to 6:30 p.m.
- Thursday, January 18, 2024  
1 to 2:30 p.m.
- Each site must be represented

## FY24

- Progress Reports – February 9, 2024
- Final Reports – May 3, 2024

## FY25

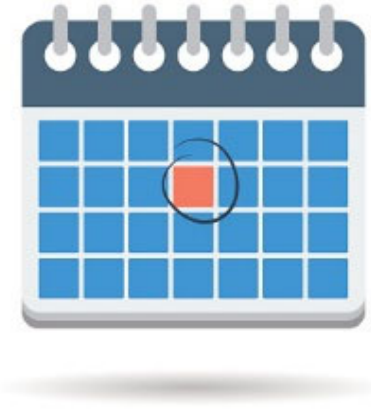
- Progress Reports – February 14, 2025
- Final Reports – May 2, 2025



**All grantees must submit progress reports and final reports**

# Due Dates

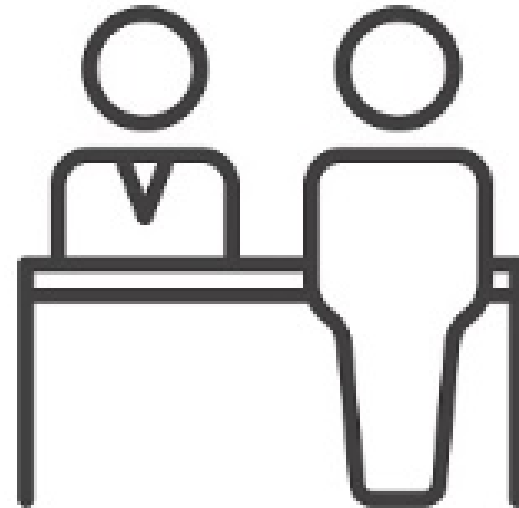
Revised Budgets – October 31, 2023



# Site Monitoring Visits

We conduct monitoring visits for:

- New grantees
- Grants over \$50,000
- Randomly-selected grantees





Questions?

# We Have Materials

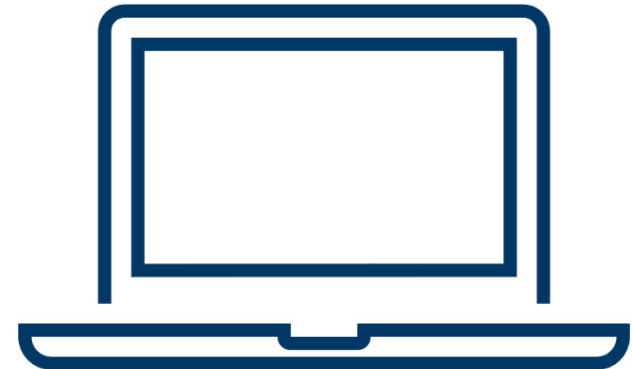
- Printable materials
- Articles
- Social media
- Videos
- Multilingual



## How to Find Them

[www.revenue.state.mn.us](http://www.revenue.state.mn.us)

Search “promotional”





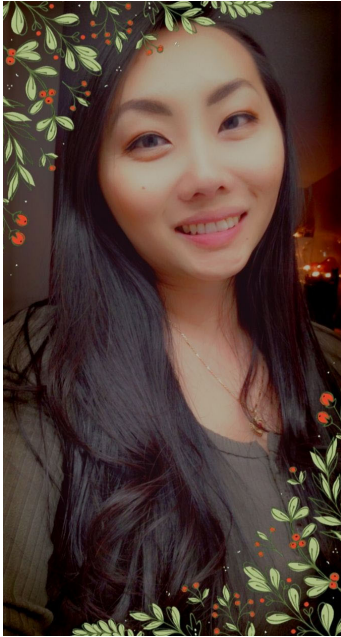
## Tax Credits Covered

- Child Tax Credit
- Working Family Credit
- K-12 Education Credit and Subtraction
- Property Tax Refund for Homeowners and Renters

# Ways to Share Materials

- Print and distribute
- Your publications
- Social media messages
- Link to tax credit videos

# Introduction



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# Future of Our VITA/TCE Support Group

- Expand services throughout Minnesota
- Increase capacity and find new partners
- Close service gaps in underserved communities

# Future of Our VITA/TCE Support Group

- Ensure customers are well served
- Provide resources, consultation, and support for state sites
- Connect interested volunteers with free tax sites

Take our survey on this webinar!

- See the survey in the chat box
- We appreciate your feedback

# Thank you!

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