

Application for Grant to Provide Volunteer Taxpayer Assistance Services — Fiscal Year 2020

Name of Organization		Date of Submission	
Grant Amount Requested		Federal Tax ID #	
Name of Contact Person		State ID #/Tax Exempt #	
Email Address of Contact Person		Phone (include extension)	
Street Address			
City		State	ZIP Code

By submitting a proposal in response to this Request for Proposals (RFP), the applicant declares that the organization is free of debt that could cause recapture or offset of grant funds. The applicant allows the Minnesota Department of Revenue to verify this information before awarding funds.

Name of Person Authorized to Sign Contracts		Title
Email of Person Authorized to Sign Contracts		
Signature of Person Authorized to Sign Contracts (Digital Signature Not Allowed)		Date

Names and email address of additional contacts to receive grant communication:

Instructions

General Information About the Workbook

Text Boxes

This workbook is a fillable PDF. Text boxes do not expand. If you need more space to answer these questions, you may provide a Word document with those answers.

Instructions for Completing the Workbook

Cover Page

Enter information in each required cell.

Checklist

Use this checklist to ensure you have included all necessary documentation with your proposal to have a complete application.

Site Data

Provide the Site Identification Number (SIDN), Electronic Filing Number (EFIN), return data, volunteer data, site opening date, site closing date, and anticipated site hours for each tax site your organization is requesting grant funds to support. If this is your first year providing volunteer taxpayer assistance services, leave the Number of Returns Prepared in 2018 and Number of Volunteers fields blank.

Only complete a site data table for tax sites your organization is requesting grant funds to support. Do not include data for tax sites not receiving part of the grant award.

Populations Served

Indicate the populations your organization assisted this past tax filing season and those you intend to assist this next filing season. You must also indicate if any of your sites are located in one of our designated underserved areas of Minnesota. Describe how your organization identified and educated these populations about your volunteer taxpayer assistance services.

Narrative

Answer all the questions listed by providing detailed information about your organization.

Budget

Provide an itemized budget for your grant request. You must separate expense requests into four categories. Ensure all expenses requested are reasonable and necessary for successful program operation. You can find information on types of positions and reasonable salary amounts at www.bls.gov/oes/

Checklist

Be sure to include the following items with your grant proposal. These items are not included in this Fiscal Year 2020 Grant Workbook.

- If requesting over \$25,000 in grant funds, include financial information depending on if your organization's:
 - **Annual income is under \$50,000:** Submit your most recent board-reviewed financial statement, IRS Form 990, or audit.
 - **Total annual revenue is \$50,000 to \$750,000:** Submit your most recent IRS Form 990 or your most recent certified financial audit.
 - **Total annual revenue is over \$750,000:** Submit your most recent certified financial audit.

Note: If your organization has not existed long enough to have a completed IRS Form 990 or audit, include your most recent board-reviewed financial statement.

- If your organization operates under a Group Exemption Ruling, you must provide **both** of the following:
 - A copy of the group exemption ruling letter listing the affiliated tax-exempt organization your organization operates under.
 - A copy of the IRS determination letter recognizing the affiliated organization qualifies under section 501(c)(3) of the Internal Revenue Code.

- If your organization is exempt from registering with the Minnesota Attorney General, you must explain why.

Site Data

Complete a site data table for each tax site your organization is requesting grant funds to support. Do not include data for tax sites that would not receive grant funding. If this is your first year providing volunteer taxpayer assistance services, leave the Number of Returns Prepared in tax year 2018 and Number of Volunteers fields blank.

The example below (in red) shows how to complete a site data table.

Site Name, Address, and County					
ABC Community Center, 123 Main Street, St. Paul, MN 55104 Ramsey Co.					
SIDN		EFIN		Is this a new tax site?	
SXXXXXXXX		XX-XXXX		YES	
Site Coordinator Name			Site Coordinator Email		
Jane Doe			janedoe@email.com		
Number of Returns Prepared				Tax Year 2018	2019 Goal
Federal				250	300
State				240	300
Property Tax				150	175
Previous Year(s)				20	25
Total				660	800
Number of Volunteers				Tax Year 2018	
New				10	
Returning				20	
Total				30	
2020 Tax Season Hours (2019 Tax Year)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2/2/2020	4/13/2020	Wed/Fri	5-8 p.m.	11	66
2020 Off-Season Hours (After April 16, 2020)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
5/8/2020	8/7/2020	Wednesdays	1-4 pm	14	42
Total Hours for Tax Season and Off-Season					108

Site Data, continued

Use the following blank tables to enter your site information. Attach additional sheets if necessary.

Site Name, Address, and County

SIDN	EFIN	Is this a new tax site?
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Site Coordinator Name	Site Coordinator Email
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Number of Returns Prepared	Tax Year 2018	2019 Goal
Federal		
State		
Property Tax		
Previous Year(s)		
Total		

Number of Volunteers	Tax Year 2018
New	
Returning	
Total	

2020 Tax Season Hours (2019 Tax Year)

Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours

2020 Off-Season Hours (After April 16, 2020)

Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours

Total Hours for Tax Season and Off-Season

Site Data, continued

Site Name, Address, and County					
SIDN		EFIN		Is this a new tax site?	
Site Coordinator Name			Site Coordinator Email		
Number of Returns Prepared				Tax Year 2018	2019 Goal
Federal					
State					
Property Tax					
Previous Year(s)					
Total					
Number of Volunteers				Tax Year 2018	
New					
Returning					
Total					
2020 Tax Season Hours (2019 Tax Year)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2020 Off-Season Hours (After April 16, 2020)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Hours for Tax Season and Off-Season					

Site Data, continued

Site Name, Address, and County					
SIDN		EFIN		Is this a new tax site?	
Site Coordinator Name			Site Coordinator Email		
Number of Returns Prepared				Tax Year 2018	2019 Goal
Federal					
State					
Property Tax					
Previous Year(s)					
Total					
Number of Volunteers				Tax Year 2018	
New					
Returning					
Total					
2020 Tax Season Hours (2019 Tax Year)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2020 Off-Season Hours (After April 16, 2020)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Hours for Tax Season and Off-Season					

Site Data, continued

Site Name, Address, and County					
SIDN		EFIN		Is this a new tax site?	
Site Coordinator Name			Site Coordinator Email		
Number of Returns Prepared				Tax Year 2018	2019 Goal
Federal					
State					
Property Tax					
Previous Year(s)					
Total					
Number of Volunteers				Tax Year 2018	
New					
Returning					
Total					
2020 Tax Season Hours (2019 Tax Year)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2020 Off-Season Hours (After April 16, 2020)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Hours for Tax Season and Off-Season					

Populations Served

Place an “X” to indicate each population your organization assisted this past tax filing season. If this is your first year, leave this section blank and complete the one below.

Populations Served — Tax Year 2018

- Individuals with annual income of \$55,000 or less
- Individuals with limited English-speaking abilities
- Individuals with disabilities
- Individuals who have recently immigrated to the United States
- Individuals who are geographically underserved, including individuals living in Greater Minnesota
- Seniors
- Veterans
- Racial and ethnic communities, including American Indians
- Individuals who are homebound
- International students
- Individuals who identify as lesbian, gay, bisexual, transgender, questioning, queer, intersex (LGBTQQI)
- Individuals who are not required to file but benefit from filing
- Other, please specify: _____

Place an “X” to indicate each population your organization intends to assist for the 2019 tax year.

Populations Intended to Serve — Tax Year 2019

- Individuals with annual income of \$55,000 or less
- Individuals with limited English-speaking abilities
- Individuals with disabilities
- Individuals who have recently immigrated to the United States
- Individuals who are geographically underserved, including individuals living in Greater Minnesota
- Seniors
- Veterans
- Racial and ethnic communities, including American Indians
- Individuals who are homebound
- International students
- Individuals who identify as lesbian, gay, bisexual, transgender, questioning, queer, intersex (LGBTQQI)
- Individuals who are not required to file but benefit from filing
- Other, please specify: _____

Indicate if any of your sites are located in one of these underserved areas:

- Greater Minnesota (More than 30 miles outside the seven-county metro area of Hennepin, Ramsey, Anoka, Washington, Dakota, Scott, and Carver)
- Brooklyn Park
- Brooklyn Center
- North Minneapolis
- Northeast Minneapolis

Populations Served, Continued

For the past filing season (tax year 2018), describe how your organization identified and educated the above populations about tax credits they may be entitled to or tax issues of concern.

For the upcoming filing season (tax year 2019), describe how your organization plans to identify and educate the above populations about tax credits they may be entitled to or tax issues of concern. Include if your organization intends to expand services to any new populations.

If your organization did not provide services this past tax filing season, indicate which populations you intend to assist for the upcoming filing season and your plan to identify and educate the above populations about tax credits they may be entitled to or tax issues of concern.

Narrative

Answer each of the questions below. If you need more space to answer questions, attach additional pages.

The State of Minnesota is committed to advancing diversity and inclusion in its own organization and in the volunteer programs that support Minnesota taxpayers. Demonstrating your organization’s commitment to diversity and inclusion is an important part of the grant application process. Diversity is the mix of human differences and similarities that impact our interactions and access to opportunity. The concept of diversity extends to all facets of life including, but not limited to: age, color, education, ethnicity, gender identity and expression, language, marital status, race, religion, sexual orientation, socioeconomic status, veteran status. Inclusion is welcoming individual differences and similarities, respecting others, treating people equitably, and forming meaningful connections, so that every person’s contributions are recognized, accepted, and incorporated.

List all of the languages spoken by volunteers and staff who will be available at your free tax preparation sites.

Describe how your organization is increasing the diversity and inclusiveness of your volunteers and customers at your free tax preparation sites.

Describe how your organization prepares volunteers to work with others who come from different backgrounds than their own (religion, culture, education, age, etc.)

Narrative, continued

Describe how grant funding will improve (or provide, if this is your first year) volunteer taxpayer assistance services to low-income, elderly, and disadvantaged Minnesotans. Include specific goals, and how your organization will meet those goals, to improve and expand volunteer taxpayer assistance services.

Describe your organization's plan for recruiting new volunteers and retaining past volunteers this filing season and how grant funds will improve these plans. Include details about how you will recruit multilingual volunteers or volunteers who represent the community your organization serves or intends to serve. If this is your organization's first year providing volunteer taxpayer assistance services, explain your goals for recruiting volunteers.

Narrative, continued

Describe your organization's plan for training volunteers to provide volunteer taxpayer assistance services this filing season and how grant funds will improve training. Include a list of federal, Minnesota, and other topics covered during training, the hours spent on each topic, the delivery method of the training (such as Link & Learn, self-study, or classroom training), and the training materials used.

Describe your organization's efforts or plans to collaborate with other organizations (such as schools, government entities, and community-based non-profit or for-profit organizations). Include specific partnership efforts and contributions your organization has provided, and plans to provide this filing season, to increase and expand volunteer taxpayer assistance services to low-income, elderly, and disadvantaged Minnesotans. Describe the roles and responsibilities of each collaborating organization, such as space provided for the site, equipment, training assistance, advertising, supplies, etc.

Budget Proposal

A. Equipment and Accessories

Item	Quantity	Cost	Total
Computers			
Printers			
Copiers			
Other:			
Subtotal			

B. Advertising

Type	Quantity	Cost	Total
Flyers			
Newspaper			
Volunteer Recruitment			
Other:			
Subtotal			

C. Salaries

Position	Hourly Wage	Number of Hours	Total
Tax Site Coordinator			
Electronic Filing Coordinator			
Volunteer Coordinator			
Administrative Staff			
Translator			
Other:			
Go to https://www.bls.gov/oes/home.htm to determine if salaries are reasonable			
Subtotal			

D. Other Expenses

Type	Quantity	Cost	Total
Volunteer Training			
Supplies			
Mileage			
Rental Space			
Volunteer Recognition			
Other:			
Subtotal			
TOTAL			

Budget, Continued

Budget: Explain how your organization will spend grant funds and why you need these items to reach your organization's goals for providing volunteer taxpayer assistance services.

- If your organization requests advertising funds but does not plan to use print advertisements, provide a detailed description of your marketing plan.
- If your organization requests salary funds, you must specify job duties and the percentage of time devoted to the volunteer taxpayer assistance program.