

Grant to Provide Volunteer Taxpayer Assistance Services

Fiscal Year 2021 (FY21) Grant Questions

FY21 Grant Questions received from the October 15 Required Grant Webinar

Is the \$10 per person limit for volunteer recognition items included in the \$500 limit for food and beverages?

No. The \$10 per person for volunteer recognition items and \$500 for food and beverages are separate allowable expenses.

If we pay a portion of the utilities for a month, can we provide details for one month and then apply that for the three months we are open?

Yes, if you pay the same amount each month. If your monthly utility costs vary, see Part 10 – Grant Payments in the RFP for more information.

What are the requirements for attending the tax trainings in December/January?

Your organization must have one representative attend the required tax training webinar for each site you receive grant funding for.

The trainings are scheduled for:

- Wednesday, December 16, 2020 – 9:00 a.m. to 12:00 p.m.
- Tuesday, December 22, 2020 – 12:00 to 3:00 p.m.
- Thursday, January 14, 2020 – 9:00 a.m. to 12:00 p.m.

Have the FY21 grant awards amounts been confirmed?

Yes. Grant awards are final for FY21, and grant contracts were issued on October 1.

How do I request advance grant funds instead of reimbursed grant funds?

We will not consider advance grant funds if your proposal did not request them.

Fiscal Year 2021 (FY21) Grant Questions

Is the AARP Tax-Aide Program eligible for this grant?

AARP sites can qualify for the grant if they partner with a qualifying non-profit organization applying for the grant.

The grant is available to organizations if both of these apply:

- They are a non-profit organization qualifying under section 501(c)(3) of the Internal Revenue Code
- They are registered with the IRS as part of the Volunteer Income Tax Assistance (VITA) or Tax Counseling for the Elderly (TCE) programs

If a partner who supports the program (but is not the grant holder) creates advertisements and are not applying for this grant, do they have to follow the same guidelines?

Yes. If you are using Minnesota Department of Revenue grant funds for advertising, the partner's advertisements must follow the grant program's guidelines.

Can my organization use grant funds to train volunteers on current federal and Minnesota tax rules?

Yes.

Does an organization have to be part of the VITA or TCE program to receive grant funds?

Yes. The grant is only available to non-profit organizations that qualify under section 501(c)(3) of the Internal Revenue Code and are registered with the IRS as part of the VITA or TCE programs.

Can grantees reimburse non-VITA or non-TCE organizations for support services, such as scheduling?

Yes.

Is the reimbursement process the same as in prior years?

No. See the Request for Proposals (RFP) for specific information based on how much your organization is awarded.

Fiscal Year 2021 Grant Questions Received Between July 31 - August 14, 2020

Are images of tax information, Social Security cards or ITINs, and state-issued photo IDs sufficient to verify ID when video conferencing is not easily available?

Yes, this was sufficient for the 2020 filing season. Our Virtual VITA procedures that allow these images for taxpayer identification are based on the temporary IRS SPEC guidelines for the 2020 filing season. The IRS may change their guidance for the 2021 filing season.

All my volunteers will work remotely next season. Can we use grant funds to cover volunteers' technology costs, including computers, headsets, and phones?

Yes. These are qualified expenses for the grant program if you use them solely for volunteer taxpayer assistance services.

Does the Minnesota Department of Revenue require equipment to be locked up when not in use and returned by a certain date?

Yes. You must follow all requirements for the VITA and TCE programs. Review the IRS's security guidelines in [IRS Publication 4299](#).

Our tax site partners cannot confirm a space to safely provide services before the grant application deadline. Should we include data for all potential sites in our application, even if they end up not hosting our services?

Yes. When you know what sites will not be operating in 2021, you must notify the department. Email us at volunteer.grant.mdor@state.mn.us.

Do virtual and mail tax preparation opportunities offered to customers in Greater Minnesota, Brooklyn Park, Brooklyn Center, North Minneapolis, or Northeast Minneapolis meet the geographic criteria for additional points?

No. We will award additional points to organizations opening a new in-person site in Greater Minnesota, Brooklyn Park, Brooklyn Center, North Minneapolis, or Northeast Minneapolis. We will also award additional points to organizations offering virtual assistance.

We are exploring different service methods and options to provide resources and information to tax filers, but not all of these will be specific to tax preparation and filing. How will the department evaluate expansion of services within this context?

We will evaluate your organization based on the criteria listed in Part 6 – Selection Criteria and Weight of the RFP. This includes expanding volunteer taxpayer assistance service hours and weeks, opening new sites, and providing virtual assistance options.

We expect to revise our 2021 budget over the next few months as we follow up-to-date health guidelines. How should we account for ongoing changes in a budget proposal we submit by the end of August?

Complete your grant application with the information you have today. If your plans change how you will spend the grant money compared to your proposed budget, request a budget change approval from us before incurring those expenses. Email requests to volunteer.grant.mdor@state.mn.us.

My organization plans to maintain remote services for our immediate population and some remote services for clients in Greater Minnesota regardless of when the COVID-19 pandemic ends. Should we list "Greater Minnesota" as one of our site locations?

Yes.