

Application for Grant to Provide Volunteer Taxpayer Assistance Services — Fiscal Year 2022-2023

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	Phone Number of Person Authorized to Sign Contracts
Signature of Person Authorized to Sign Contracts	Date

Digital signatures are allowed.

Names and email addresses of additional contacts to receive grant communication. Include anyone who prepares the grant proposal, reports, or reimbursement requests, or a backup in case of turnover

Instructions

General Information About the Workbook

Entry Required

Complete all boxes, when applicable.

Text Boxes

This workbook is a fillable PDF. Text boxes do not expand. If you need more space to answer these questions, attached additional pages.

Instructions for Completing the Workbook

Cover Page

Enter all required information.

Checklist Page

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

Site Data Pages

Provide the Site Identification Number (SIDN), Electronic Filing Number (EFIN), Site Coordinator info, 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 tax year 2020 and Number of Volunteers fields blank. **Important:** 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.

Narrative Pages

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

Budget Pages

Provide an itemized budget for each year 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 2022-23 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.

- One of these, based on the entity type:
 - IRS determination letter recognizing an organization described in Internal Revenue Code, section 501(c), and exempt from tax under I.R.C., section 501(c)
 - Letter of academic accreditation for college, university, or other institution of higher learning
 - Letter submitted by agency or government head on its official stationary indicating it is a government entity.

- If your organization operates under a Group Exemption Ruling, you must provide **both** of these:
 - 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's Office, 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 will not receive grant funding. If this is your first year providing volunteer taxpayer assistance services, leave the Number of Returns Prepared in tax year 2020 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 SXXXXXXXX	EFIN XX-XXXX	Is this a new tax site? YES
Site Coordinator Name Jane Doe	Site Coordinator Email janedoe@email.com	

Number of Returns Prepared	Tax Year 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal	250	300	350
Minnesota State	240	300	350
Minnesota Property Tax	150	175	200
Previous Years	20	25	25
Total	660	800	925
Number of Volunteers	Tax Year 2020		
New	10		
Returning	20		
Total	30		

2022 Season Hours (Tax Year 2021)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2/3/2022	4/14/2022	Wed/Fri	5 - 8 p.m.	11	66
2022 Off-Season Hours (After April 15, 2022)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
5/5/2022	8/11/2022	Wed	1 - 4 p.m.	14	42
2023 Season Hours (Tax Year 2022)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2/3/2023	4/14/2023	Wed/Fri	5 - 8 p.m.	11	66
2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
5/5/2023	8/11/2023	Wed	1 - 4 p.m.	14	42
Total Weeks and Hours for Tax Season and Off-Season				50	216

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 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
Returning			
Total			

2022 Season Hours (Tax Year 2021)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2022 Off-Season Hours (After April 15, 2022)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2023 Season Hours (Tax Year 2022)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and 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 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
Returning			
Total			

2022 Season Hours (Tax Year 2021)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
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2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for Tax Season and Off-Season					

Site Data, continued

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 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
Returning			
Total			

2022 Season Hours (Tax Year 2021)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
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2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and 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 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
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Total			

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Total Weeks and Hours for Tax Season and Off-Season					

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Number of Returns Prepared	Tax Year 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
Returning			
Total			

2022 Season Hours (Tax Year 2021)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
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Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for Tax Season and Off-Season					

Site Data, continued

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Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
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Returning			
Total			

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2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
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Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
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Returning			
Total			

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2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for Tax Season and Off-Season					

Site Data, continued

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 2020	Tax Year 2021 Goal	Tax Year 2022 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
Returning			
Total			

2022 Season Hours (Tax Year 2021)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2022 Off-Season Hours (After April 15, 2022)					
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Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for Tax Season and Off-Season					

Site Data, continued

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Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2020		
New			
Returning			
Total			

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Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
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Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2023 Season Hours (Tax Year 2022)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2023 Off-Season Hours (After April 15, 2023)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for Tax Season and Off-Season					

Narrative

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

Describe how you determined the FY22 and FY23 goal numbers of returns prepared for your tax sites you listed on the Site Data tables.

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 you will meet those goals, to improve or expand volunteer taxpayer assistance services. This should include SMART (Specific, Measurable, Attainable, Realistic, Timely) goals.

Narrative, continued

Describe your specific partnership efforts or plans to collaborate with other organizations (such as schools, government entities, and community-based non-profit or for-profit organizations) for the tax program. 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.

Describe your plans to expand services to any new populations through collaboration and partnership with new organizations, especially focused on historically disadvantaged populations. Include how you will foster diversity and inclusion and recruit volunteers from these populations.

Narrative, continued

Describe your 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 first year providing volunteer taxpayer assistance services, explain your goals for recruiting volunteers.

Describe your plan to serve taxpayers who need services in languages other than English.

Narrative, continued

Describe your 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.

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 commitment to diversity and inclusion is a vital 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, and veteran status. Inclusion is welcoming individual differences and similarities, respecting others, treating people equitably, and forming meaningful connections. That way, every person's contributions are recognized, accepted, and incorporated.

Describe how you prepare your volunteers to work with people from different backgrounds (religions, culture, education, age, etc.). We give additional consideration to organizations that include cultural competency training and education for their volunteers and incorporate diversity and inclusion practices.

FY22 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			

FY22 Budget, Continued

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

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

FY23 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			

FY23 Budget, Continued

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

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