

Welcome!

The webinar will begin shortly. Remember to mute your microphone.

- We recommend using a headset
- If you cannot hear, turn on your computer speakers and adjust the volume
- The webinar is being recorded.



Grant to Provide Volunteer Taxpayer Assistance Services and Tax Credit Outreach Grant

Fiscal Year 2024-2025

Jessica Delcid | Grant Coordinator

June 21, 2023

Introduction



Jessica Delcid
Grant Coordinator

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 any grant-related questions, call us at 651-556-3052 or 1-800-818-6871, or email Volunteer.Grant.MDOR@state.mn.us.

Today's Agenda

- Grant overview
- Grant request for proposal (RFP) process
- Grant awards
- Reimbursement of grant funds
- Due dates



Grant Overview: Taxpayer Assistance Grant

What is the Grant to Provide Volunteer Taxpayer Assistance Services for?

- Providing volunteer taxpayer assistance to Minnesotans who are low-income, elderly, and disadvantaged

Who qualifies?

- Eligible organizations that meet the definition provided in section 7526A(2)(e)(b) of the Internal Revenue Code
- Organizations registered with the IRS as part of the Volunteer Income Tax Assistance (VITA) or Tax Counseling for the Elderly (TCE) programs

Grant Program Goals: Taxpayer Assistance Grant

Our long-term goals for expanding service remain for FY24-25:

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

Grant Overview: Tax Credit Outreach Grant

Tax Credit Outreach Grant

- Publicize and promote availability of eligible credits to taxpayers likely to be eligible for those credits

Who qualifies?

- Nonprofit organizations or federally recognized Indian Tribes with experience serving demographic regions that have historically low rates of participation in eligible credits
- Eligible organizations that meet the definition provided in section 7526A(2)(e)(b) of the Internal Revenue Code

Grant Program Goals: Tax Credit Outreach Grant

Our goal for this grant funding is to:

- Increase awareness and claims for credits such as:
 - Child Tax Credit
 - Renter's Income Tax Credit
 - Working Family Credit
 - Property Tax Refund

Grant Program Goals: Tax Credit Outreach Grant

Our goal for this grant funding is to:

- Increase awareness and claims for credits in these areas:
 - Greater Minnesota
 - Brooklyn Park
 - Brooklyn Center
 - North Minneapolis
 - Northeast Minneapolis
 - Tribal Reservations
- Increase publicizing and promotion of eligible credits to taxpayers in additional languages, including but not limited to:
 - Spanish
 - Hmong
 - Oromo
 - Somali

Grant Proposal Process

- Fillable PDF grant workbook
 - Available on our website beginning June 30, 2023
 - Fill out and submit electronically
 - Authorized representative must sign the cover sheet
 - There will be a separate grant workbook based on which grant you are applying for
- Proposal deadline is July 31, 2023

Grant Proposal Process

- Include all required documentation
- We will not consider your proposal if there is missing documentation
- We will not extend grant deadlines
- Questions about the RFP will be accepted June 30 – July 14

Tips for Completing Your Proposal

- Use the Grant Workbook
- Double-check calculations
- Be clear and concise
- Use more than one reviewer
- Prepare your proposal early

Grant Awards and Expenses

Eligible expenses for the **Taxpayer Assistance Grant** may include:

- Employee salaries
- Advertising (including costs of translation)
- Recruiting volunteers
- Training volunteers and creating training materials
- Equipment and accessories
- Other

Grant Awards and Expenses

Eligible expenses for the **Tax Credit Outreach Grant** may include:

- Employee salaries
- Advertising (including costs of translation)
- Digital content (social media, videos, podcasts, infographics, etc.)
- Targeted communication
- Promotional products or branded merchandise
- Other

Guidelines for Grant Expenses

- You may **not** purchase gift cards with grant funds.
- Food and beverages for volunteers may not exceed \$500 per organization per fiscal year. Itemized receipts are required.

Review the RFP for a full list of allowed and ineligible expenses.

Salary Funding

- Must be reasonable
- Cannot be used to pay volunteers
 - Volunteer activities include:
 - Conducting intake
 - Preparing tax returns
 - Doing quality review
 - Interpreting



Guidelines for Advertisements

Advertisements must:

- Be approved by Revenue **before** promoting.
- Be approved **each** grant period.
- Include this statement: “Service made available through a grant provided by the state of Minnesota.”
- Be professional and accurate.
- Represent the integrity and services provided.

Incentives for Volunteers

Incentives for recruiting volunteers:

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

Reimbursement of Grant Funds

You may request reimbursement of grant funds:

- When the progress report is due (up to half)
- When the final report is due (up to half)
- Before August 31 (remaining amounts)

Reimbursement of Grant Funds

- Reimbursement request expense tracking sheet
 - Complete one each time you request reimbursement
 - We will not accept requests without it
 - Available on our grant website
- Include supporting documentation



- Fiscal Year 2024-25 RFP
 - Available on our website **June 30, 2023**
 - Submit proposals by email
 - Proposals due **July 31, 2023**



- **FY24** Progress Reports due February 9, 2024
- **FY24** Final Reports due May 3, 2024

- **FY25** Progress Reports due February 14, 2025
- **FY25** Final Reports due May 2, 2025

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





Questions?

Outreach Services



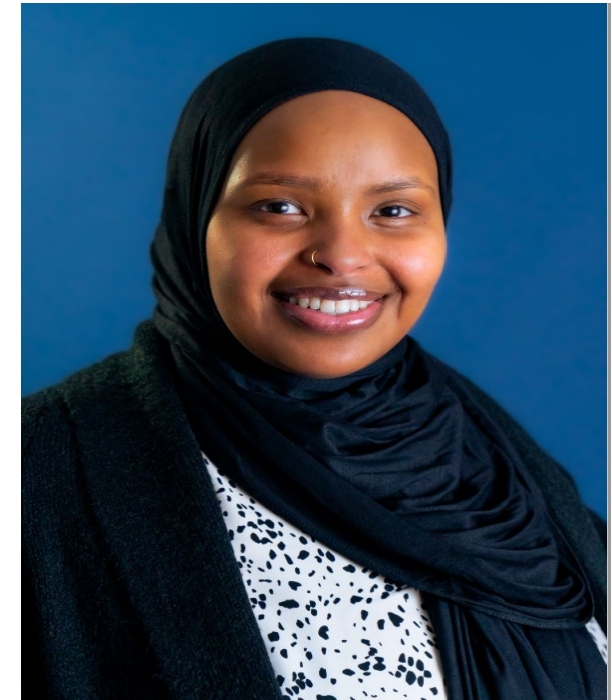
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Future of Our VITA/TCE Support Group

- Expand services throughout Minnesota
- Increase existing site capacity and find new partners to open sites
- Close service gaps in underserved regions and communities
- Ensure quality service for metro customers next season
- Provide resources, consultation, and support for Minnesota sites
- Connect interested volunteers with free tax preparation sites

Take our survey!

- See our link in the chat
- We appreciate your feedback

Thank you!

Jessica Delcid

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