

## Grant to Provide Volunteer Taxpayer Assistance Services — Fiscal Year 2024 Final Report

Due May 3, 2024

Name of Organization

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List the populations you served at your organization's free tax preparation sites this filing season.

What policies and procedures do you have in place to ensure quality site operations and the accuracy of returns prepared?

Identify advertising methods used to reach the populations you served this filing season. If you have previously received grant funding, how was advertising different this year than in other years? Briefly evaluate whether the advertising helped you reach your goals.

## Fiscal Year 2024 Final Report, Continued

How has this grant helped you develop or expand the volunteer taxpayer assistance services provided?

What were your FY24 goals as outlined in your original grant proposal?

Identify the steps you took to meet your FY24 goals. How can you measure your success toward these goals?

## Fiscal Year 2024 Final Report, Continued

Identify any issues that hindered you from working toward your FY24 goals outlined in your grant proposal. How did you overcome these issues?

Describe how your service levels have changed from prior years. If service levels have decreased, describe the steps you are taking to increase those service levels.

Describe how the grant helped you collaborate with other organizations to increase volunteer taxpayer assistance services. Include the roles and responsibilities of each collaborating organization, such as space provided for the site, equipment, training assistance, advertising, supplies, etc.

## Fiscal Year 2024 Final Report, Continued

What testimonials have you received from your customers? For customers who claimed the Child Tax Credit, what impact did it have on their lives?

Share any other important information to better demonstrate how the grant has helped your volunteer taxpayer assistance services this filing season. What resources do you need from the Minnesota Department of Revenue (training, resources, etc.)?

If you need more space for responses, attach a separate sheet of paper.

# Fiscal Year 2024 Final Report, Continued

	Current Tax Year	Current Year Goal (from proposal)
Number of Volunteers	_____	_____
Number of Tax Assistance Sites	_____	_____
Number of Federal Returns Prepared	_____	_____
Number of Minnesota Income Tax Returns Prepared	_____	_____
Number of Property Tax Refund Returns Prepared	_____	_____
Number of Minnesota Property Tax Refund Returns Prepared in AARP's PTA Software	_____	_____
Number of Clients Turned Away	_____	_____

Signature of Authorized Representative	Date
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*Digital signatures are allowed.  
Email completed report to Volunteer.Grant.MDOR@state.mn.us*