



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

Application Workbook

FY 25

Deadline to apply: July 31, 2024



Application for Grant to Provide Volunteer Taxpayer Assistance Services and Grant to Provide Tax Credit Outreach – Fiscal Year 2025

Name of Organization		Date of Submission
FY25 TAG Amount	FY25 TCO Amount	VITA, AARP/TCE Program, Other Org
Total FY25 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, attach additional pages.

Instructions for Completing the Workbook

Cover Page (required for all applicants)

Enter all required information.

Checklist Page (required for all applicants)

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

Site Data Pages (only complete if you are applying for Taxpayer Assistance Services grant funds)

You only need to complete this page if you are applying for Taxpayer Assistance Services grant funds. 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 hours for each tax site requesting funds. If this is your first year providing volunteer taxpayer assistance services, leave the Number of Returns Prepared in tax year 2023 and 2024 and Number of Volunteers fields blank. **Important:** Do not include data for tax sites that will not receive grant funds.

Narrative Pages (complete the narrative questions based on the services you will provide)

Answer all the questions listed based on which grant you are applying for. Provide detailed information about your organization.

Budget Pages (required for all applicants)

Provide an itemized budget for the year. You must separate expense requests into four categories. All expenses must be reasonable and necessary to operate your program successfully. For more information on types of positions and reasonable salary amounts, visit www.bls.gov/oes.

Definitions

Low income: Households making less than \$64,000 annually - follows the Earned Income Tax Credit guidelines.

Elderly: Age 60 or older.

Disadvantaged: Individuals with limited English-speaking ability, disabilities, among many others identified in the Request for Proposals.

Checklist

You must include these items with your grant proposal. These items are not included in this Fiscal Year 2025 Grant Workbook.

- If requesting over \$50,000 in grant funds, you must 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 990-EZ , or certified financial audit
 - **Total annual revenue is \$50,000 to \$750,000:** Submit your most recent IRS Form 990 or 990-EZ or your most recent certified financial audit.
 - **Total annual revenue is over \$750,000:** Submit your most recent certified financial audit.

Note: If your nonprofit organization has not existed long enough to have a completed IRS Form 990 or 990-EZ or audit, include your most recent board-reviewed financial statement. If you are a for-profit business requesting over \$50,000 in grant funds, you must include your most recent federal and state tax returns, current financial statements, certification that the business is not under bankruptcy proceedings, and disclosure of any liens on its assets. If your for-profit business has not been in business long enough to have a tax return, you must demonstrate appropriate internal financial controls.
- You must include one of these based on your 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 stationery to indicate 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.
- Evidence of good standing with the Secretary of State.

Site Data — Taxpayer Assistance

Complete a site data table for each tax site requesting grant funds. Do not include data for tax sites that will not receive grant funds. If this is your first year providing volunteer taxpayer assistance services, leave the Number of Returns Prepared in tax year 2023 and 2024 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

Select the type of tax return preparation methods that will be provided at this site:

- Traditional Virtual Facilitated Self Assistance (FSA)

Number of Returns Prepared	Tax Year 2023	Tax Year 2024 Goal
Federal	250	300
Minnesota State	240	300
Minnesota Property Tax	150	175
Previous Years	20	25
Total	660	800
Number of Volunteers	Tax Year 2023	Tax Year 2024 Goal
New	10	12
Returning	20	20
Total	30	32

2025 Season Hours (Tax Year 2024)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2/3/2025	4/14/2025	Wed/Fri	5 - 8 p.m.	11	66
2025 Off-Season Hours (After April 15, 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
5/5/2025	8/11/2025	Wed	1 - 4 p.m.	14	42
Total Weeks and Hours for Tax Season and Off-Season				25	108

Site Data, continued

Site Name, Address, and County

SIDN	EFIN	Is this a new tax site?
Site Coordinator Name	Site Coordinator Email	

Select the type of tax return preparation methods that will be provided at this site:

Traditional Virtual Facilitated Self Assistance (FSA)

Number of Returns Prepared	Tax Year 2023	Tax Year 2024 Goal
Federal		
Minnesota State		
Minnesota Property Tax		
Previous Years		
Total		
Number of Volunteers	Tax Year 2023	Tax Year 2024 Goal
New		
Returning		
Total		

2025 Season Hours (Tax Year 2024)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2025 Off-Season Hours (After April 15, 2025)					
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	

Select the type of tax return preparation methods that will be provided at this site:

Traditional
 Virtual
 Facilitated Self Assistance (FSA)

Number of Returns Prepared	Tax Year 2023	Tax Year 2024 Goal
Federal		
Minnesota State		
Minnesota Property Tax		
Previous Years		
Total		
Number of Volunteers	Tax Year 2023	Tax Year 2024 Goal
New		
Returning		
Total		

2025 Season Hours (Tax Year 2024)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2025 Off-Season Hours (After April 15, 2025)					
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	

Select the type of tax return preparation methods that will be provided at this site:

Traditional
 Virtual
 Facilitated Self Assistance (FSA)

Number of Returns Prepared	Tax Year 2023	Tax Year 2024 Goal
Federal		
Minnesota State		
Minnesota Property Tax		
Previous Years		
Total		
Number of Volunteers	Tax Year 2023	Tax Year 2024 Goal
New		
Returning		
Total		

2025 Season Hours (Tax Year 2024)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2025 Off-Season Hours (After April 15, 2025)					
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	

Select the type of tax return preparation methods that will be provided at this site:

Traditional
 Virtual
 Facilitated Self Assistance (FSA)

Number of Returns Prepared	Tax Year 2023	Tax Year 2024 Goal
Federal		
Minnesota State		
Minnesota Property Tax		
Previous Years		
Total		
Number of Volunteers	Tax Year 2023	Tax Year 2024 Goal
New		
Returning		
Total		

2025 Season Hours (Tax Year 2024)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2025 Off-Season Hours (After April 15, 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for Tax Season and Off-Season					

Narrative — Taxpayer Assistance

Answer each of the questions below if you are requesting grant funds to provide volunteer taxpayer assistance services. If you need more space to answer questions, attach additional pages.

Describe your history performing the work this grant will fund. Also describe your organization's current staffing.

Verify none of the current principals (public officials, board members, or staff with authority to access grant funds) were convicted of a felony financial crime in the last 10 years.

Are you opening a new in-person free tax preparation site on a Tribal reservation or in rural areas greater than 50 miles from a current free tax preparation site? If not, are you marketing any nearby sites to these communities or have partnership efforts to reach these communities?

Narrative, continued

Our free tax preparation services are not reaching enough taxpayers on Tribal reservations or in Greater Minnesota. What is your creative solution for assisting taxpayers in person on Tribal reservations and in rural areas greater than 50 miles from a current free tax preparation site? Detail step-by-step what your organization will commit to with additional grant funding this filing season.

Describe how grant funding will improve (or provide, if this is your first year) volunteer taxpayer assistance services to immigrant, low-income, elderly, and disadvantaged Minnesotans. Include clearly stated goals, and how you will meet those goals to expand (or provide, if this is your first year) volunteer taxpayer assistance services. This should include SMART goals (Specific, Measurable, Attainable, Realistic, Timely).

Narrative, continued

Describe specific partnerships or plans to collaborate with other organizations (such as schools, government entities, Tribal governments, American Indian nonprofits, and community-based non-profit or for-profit organizations) to increase (or provide, if this is your first year) volunteer taxpayer assistance services. Describe the roles and responsibilities of each organization. This may include providing equipment, training assistance, advertising, or supplies. Describe specific contributions your organization plans to provide to expand volunteer taxpayer assistance services to immigrant, low-income, elderly, and disadvantaged Minnesotans.

Describe your plan to expand services to new populations identified in this workbook. Describe how you will do this through collaboration and partnerships with new organizations, especially those focused on historically disadvantaged populations. This may include expanded filing options such as virtual services, drop-off services, or Facilitated Self Assistance (FSA). We give additional consideration to organizations that foster diversity and inclusion and recruit volunteers from these populations.

Narrative, continued

Describe your plan to recruit new volunteers and retain past volunteers. Also describe how grant funds will improve these plans. If this is your first year providing volunteer taxpayer assistance services, include your goals to recruit volunteers. We give additional consideration to organizations that detail recruitment of multilingual volunteers and work to recruit volunteers who represent the communities they serve.

Describe your plan to serve taxpayers in languages other than English, including but not limited to Spanish, Hmong, Oromo, and Somali. Include any details about needed translation, whether done internally or through contractors.

Narrative, continued

Describe your plan to train volunteers this filing season, and how grant funds will improve training. Include a list of federal, Minnesota, and other covered topics, 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. We give additional consideration to organizations who provide extensive Minnesota tax training.

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.

Narrative — Tax Credit Outreach

Answer each of the questions below if you are requesting grant funds to publicize and promote available Minnesota tax credits. If you need more space to answer questions, attach additional pages.

Describe your history performing the work this grant will fund. Also describe your organization's current staffing.

Verify that none of the current principals (public officials, board members, or staff with authority to access grant funds) were convicted of a felony financial crime in the last 10 years.

Describe your plan to publicize and promote available Minnesota tax credits. What languages do you plan to use? We give additional consideration to organizations that have experience serving demographic groups or geographic regions that have historically had low rates of participation in eligible credits, including immigrant communities, limited English-speaking communities, senior communities, low-income communities, Tribal reservations, rural areas greater than 50 miles from a current site, Brooklyn Park, Brooklyn Center, North Minneapolis, and Northeast Minneapolis.

Narrative, continued

Describe how grant funding will help you publicize and promote available Minnesota tax credits. Include clearly stated goals that describe how you will promote the Child Tax Credit, Working Family Credit, the K-12 Education Credit, the Renter's Income Tax Credit, and the Homestead Credit Refund (for Homeowners) to taxpayers with historically low rates of claiming these credits. This should include SMART goals (Specific, Measurable, Attainable, Realistic, Timely).

Describe specific partnerships or plans to collaborate with other organizations (such as schools, government entities, Tribal governments, American Indian nonprofits, and community-based non-profit or for-profit organizations) to promote available Minnesota tax credits. Describe the roles and responsibilities of each organization. This may include providing equipment, training assistance, advertising, or supplies. Describe specific contributions your organization plans to provide to reach taxpayers with historically low rates of claiming these credits. We give additional consideration if your partners serve demographic groups or geographic regions with historically low rates of participation in eligible credits, including immigrant communities, limited English-speaking communities, senior communities, low-income communities, Tribal reservations, rural areas greater than 50 miles from a current site, Brooklyn Park, Brooklyn Center, North Minneapolis, and Northeast Minneapolis.

Narrative, continued

Describe your plan to serve taxpayers who need materials in languages other than English, including but not limited to Spanish, Hmong, Oromo, and Somali. Include any details about translating materials, whether done internally or through contractors.

Identify the populations you plan to serve. We give additional consideration to organizations who serve individuals who speak limited or no English, have low income, are age 60 or older, are American Indian, or have historically low rates of participation in eligible Minnesota tax credits.

FY25 Budget Proposal — Tax Credit Outreach

A. Equipment and Accessories	Quantity	Cost	Total
Computers			
Printers			
Copiers			
Toner/Ink Cartridges			
Other:			
Subtotal			

B. Advertising	Quantity	Cost	Total
Flyers			
Print Advertisements			
Direct Mailings			
Digital Content			
Other:			
Subtotal			

C. Salaries	Hourly Wage	Number of Hours	Total
Outreach Coordinator			
Administrative Staff			
Translator			
Other:			
Go to https://www.bls.gov/oes/home.htm to determine if salaries are reasonable			
Subtotal			

D. Other Expenses	Quantity	Cost	Total
Outreach Fair Event Fees			
Supplies			
Promotional/Branded Products			
Other:			
Subtotal			
FY25 TOTAL			

FY25 Budget, Continued

Budget: Explain how you will spend grant funds and why you need these items to reach your goals to publicize and promote available Minnesota tax credits.

- 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 publicizing and promoting the availability of eligible Minnesota tax credits.

FY25 Budget Proposal — Taxpayer Assistance

A. Equipment and Accessories	Quantity	Cost	Total
Computers			
Printers			
Copiers			
Hotspots			
Toner/Ink Cartridges			
Software			
Other:			
Subtotal			

B. Advertising	Quantity	Cost	Total
Flyers			
Print Advertisements			
Volunteer Recruitment			
Digital Content			
Other:			
Subtotal			

C. Salaries	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	Quantity	Cost	Total
Volunteer Training			
Supplies			
Rental Space			
Food/Beverages (\$500 limit)			
Utilites			
Other:			
Subtotal			
FY25 TOTAL			

FY25 Budget, Continued

Budget: Explain how you will spend grant funds and why you need these items to reach your goals to provide 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.