



Grant to Provide Volunteer Taxpayer Assistance Services and Tax Credit Outreach

Fiscal Year (FY) 2026-27 Grant Questions

FY26-27 Grant Questions received between July 1 – July 11, 2025

Referring to the grant workbook checklist page (page 4): "These items are not included in this Fiscal Year 2026-27 Grant Workbook. The Exhibits can be found on the grant webpage." Does this mean we do not need to supply what is requested in Exhibits A to E?

Exhibits A to E are new this year and **are required**. They are only listed in the grant workbook checklist on page 4 and not in the workbook. Go to the [grant webpage](#) and select **Information and Forms for the Fiscal Year 2026-2027 RFP** to access them.

Who is required to sign the Exhibits?

An employee of the organization applying for the grant must sign the exhibits, not a volunteer of the VITA and TCE program who is assisting with completing the grant proposal.

Are you aware of the timeline for signing on with the IRS as a Volunteer Income Tax Assistance (VITA) site? If we started this process now, is there a chance that we could be considered eligible for the Volunteer Taxpayer Assistance Services grant in time for the July 31 submission deadline?

Yes, the IRS recommends new tax sites request Site Identification Numbers (SIDN) starting in June or July. When you receive your SIDN, you can register as a Responsible Official and apply for an Electronic Filing Identification Number (EFIN). We will consider you for this grant if you have begun the process to obtain a SIDN by the due date of the proposals. You must provide copies of both the SIDN and EFIN applications with your proposal.

Could we be considered for the Taxpayer Assistance Services grant if we started the process of registering as a VITA site with the IRS and would be ready to implement at the start of the grant period, or would it be better to focus on the Tax Credit Outreach proposal for this round and save the other program for a future round?

We will consider you for the Taxpayer Assistance Services grant if you begin the process now. The [Volunteer Grant Team](#) can assist you with getting started and connect you with IRS representatives. You must provide copies of the SIDN and EFIN applications with your proposal.

Can an organization apply for the Tax Credit Outreach grant and use the funds awarded to provide personal representation before the IRS and Minnesota Department of Revenue?

Yes. See [Minnesota Statute section 270C.21 subd. 4\(2\) and Minn. Stat. section 270C.21 subd. 2\(d\)](#).

There is a \$500 per organization limit on food and beverages for volunteers. Our program operates seven sites with over 100 volunteers. Is there any exception from this \$500 limit?

No, we do not make exceptions to this limit. Our grant guidelines include a food and beverage limit of \$500 per organization.

Could you elaborate on the new Exhibit A Performance Capacity Questions 1 and 3? What level of detail are you asking for? Are you asking to repeat the information provided in progress and final reports or is a general response such as, "The program received prior year grants and utilized such grants to operate a VITA program serving over XXXX taxpayers." sufficient?

Answer each question with a short, clear summary. You do not need to include extensive detail or repeat information from previous reports.

Question 3 example: "We received grants from these state agencies (list agencies) for \$X,XXX. We met all proposed goals, including (give brief outcome)."

On the Site Data pages, there is a question asking if this is a new site. How should we answer if it is a prior site adding additional sessions?

If the site was open in previous years, answer "no." Additional sessions or dates do not qualify as a new site. Current site expansion in sessions, dates, or hours are given additional consideration and points.

We understand based on prior outreach grants that interpretation services would qualify under the Tax Credit Outreach grant. However, interpretation services are mentioned on page 6 of the RFP under the Taxpayer Assistance Grant, but not under the Tax Credit Outreach Grant. Can we use outreach funds to fund interpretation services?

Yes, the Tax Credit Outreach Grant allows interpreter services. Find it on page 6 under **What Activities are allowed for Tax Credit Outreach Grant funds**: Translating advertising materials with contracted interpreter services. These services may also be used for hosting events to promote Minnesota tax credits.

FY26-27 Grant Questions received from the grant webinar on June 18, 2025

Can I apply for the Taxpayer Assistance Grant and the Tax Credit Outreach Grant?

Yes, you can apply for both grants.

When can grant work begin?

October 1, 2025, or when the grant contract is signed by both parties, whichever is later.

Is there a cap on the amount of grant funds I can apply for?

No. The Taxpayer Assistance Grant has \$1.25 million available each fiscal year and the Tax Credit Outreach Grant has \$1.5 million available each fiscal year. There is no individual cap on the amount of grant funds you can apply for, but requests should be reasonable and justified in the grant application.

May I use Taxpayer Assistance Grant funding to host an info session to the public to promote expanded services we offer, such as expanded hours and Facilitated Self Assistance (FSA) delivery service, or do I need to apply for a separate Tax Credit Outreach grant? Anticipated expenses include advertising and food and would be less than \$200 per session.

Advertising expenses would be approved under the Taxpayer Assistance Grant, but food for the public is not an eligible expense. When deciding whether to apply, remember to consider the time commitment of the application and reporting processes to determine if the amount you're requesting is worthwhile for you and your organization.

What is the difference between the Tax Credit Outreach Monthly Summary, Progress, and Final Reports?

The Monthly Summaries report on what credits were promoted and the events and activities you facilitated or attended each month. The Progress Reports detail your goals and how you prepared for the season. The Final Reports give us information on the progress of your goals and what work you did during the fiscal year. The progress and final reports show a breakdown of how you used grant funds vs. the monthly summaries which show the events and activities you participated in.

For the Tax Credit Outreach Grant, do I still need to submit Monthly Summary Reports when Progress and Final Reports are due?

Yes.

How many months of Monthly Summary Reports are required for the Tax Credit Outreach Grant?

The Tax Credit Outreach Grant contract covers October through June. Eight months of reports are required, beginning in November and concluding in June.

Why do you only accept questions on the Request for Proposals (RFP) until July 11? What if I have an important question after July 11?

Questions are accepted July 1 through July 11 so we have time to respond to questions and allow all potential applicants to review the information before the application deadline of July 31. We will not respond to questions after July 11.

If a vendor invoice is stamped "paid," is that sufficient evidence of payment?

No. Proof of payment is required for all expenses, including receipts, cancelled checks (front and back), or credit card and bank statements.