



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

Application Workbook

FY26-27

Deadline to apply: July 31, 2025

Application for Grant to Provide Volunteer Taxpayer Assistance Services and Grant to Provide Tax Credit Outreach – Fiscal Year 2026-2027

Name of Organization		Date of Submission
FY26 TAG Amount	FY26 TCO Amount	Total FY26 Grant Amount Requested
FY27 TAG Amount	FY27 TCO Amount	Total FY27 Grant Amount Requested
VITA, AARP/TCE Program, Other Org		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.

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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 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 each year. You must separate expense requests into four categories: equipment and accessory items, advertising, salaries, and other expenses. 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 \$69,000 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 2026-27 Grant Workbook. The Exhibits can be found on the grant webpage.

- ☐ **Exhibit A:** Required financial and grantee capacity review. For requests of \$50,000 or more, you must describe your history of performing the work that will be funded by the grant. This includes describing your organization's current staffing and budget.
- ☐ **Exhibit B:** If you are requesting over \$50,000 in grant funds, you must include financial information according to your organization's income bracket:
 - **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.
- ☐ **Exhibit C:** Evidence of good standing with the Secretary of State.
- ☐ **Exhibit D:** You must provide a written certification that none of your 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.
- ☐ **Exhibit E:** Certification not suspended or debarred by the State of Minnesota or the Federal government.

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 2025 and Number of Volunteers fields blank.

The example 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	

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 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
Federal	250	300	350
Minnesota State	240	300	350
Minnesota Property Tax	150	175	200
Previous Years	20	25	30
Total	660	800	930
Number of Volunteers	Tax Year 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
New	10	12	15
Returning	20	20	25
Total	30	32	40

2026 Season Hours (Tax Year 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2/3/2026	4/14/2026	Wed/Fri	5 - 8 p.m.	11	66
2026 Off-Season Hours (After April 15, 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
5/5/2026	8/11/2026	Wed	1 - 4 p.m.	14	42
Total Weeks and Hours for 2026 Tax Season and Off-Season				25	108
2027 Season Hours (Tax Year 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2/3/2027	4/14/2027	Wed/Fri	5 - 8 p.m.	11	66
2027 Off-Season Hours (After April 15, 2027)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
5/5/2027	8/11/2027	Wed	1 - 4 p.m.	14	42
Total Weeks and Hours for 2027 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 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
New			
Returning			
Total			

2026 Season Hours (Tax Year 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2026 Off-Season Hours (After April 15, 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2026 Tax Season and Off-Season					
2027 Season Hours (Tax Year 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2027 Off-Season Hours (After April 15, 2027)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2027 Tax Season and Off-Season					

Site Data, continued

Site Name, Address, and County

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Site Coordinator Name	Site Coordinator Email	

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

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Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
New			
Returning			
Total			

2026 Season Hours (Tax Year 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2026 Off-Season Hours (After April 15, 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2026 Tax Season and Off-Season					
2027 Season Hours (Tax Year 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2027 Off-Season Hours (After April 15, 2027)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2027 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 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
New			
Returning			
Total			

2026 Season Hours (Tax Year 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2026 Off-Season Hours (After April 15, 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2026 Tax Season and Off-Season					
2027 Season Hours (Tax Year 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2027 Off-Season Hours (After April 15, 2027)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2027 Tax Season and Off-Season					

Site Data, continued

Site Name, Address, and County

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Number of Returns Prepared	Tax Year 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
Federal			
Minnesota State			
Minnesota Property Tax			
Previous Years			
Total			
Number of Volunteers	Tax Year 2024	Tax Year 2025 Goal	Tax Year 2026 Goal
New			
Returning			
Total			

2026 Season Hours (Tax Year 2025)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2026 Off-Season Hours (After April 15, 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2026 Tax Season and Off-Season					
2027 Season Hours (Tax Year 2026)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
2027 Off-Season Hours (After April 15, 2027)					
Opening Date	Closing Date	Days Open	Hours Open	Weeks Open	Total Hours
Total Weeks and Hours for 2027 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.

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

Our free tax preparation services are not reaching enough taxpayers on Tribal reservations or in rural areas. What is your creative solution for assisting taxpayers in person on Tribal reservations and in rural areas? Detail step-by-step what your organization will commit to with grant funding this filing season to assist taxpayers in person on Tribal reservations and rural areas.

Describe your plan for expanding services which may include expanding filing options to meet the needs of your community, such as virtual services, drop-off services, or Facilitated Self Assistance (FSA). Also describe your plan for expanding hours during and after filing season.

Narrative, continued

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

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 points to organizations that detail recruitment of multilingual volunteers and work to recruit volunteers who represent the communities they serve.

Narrative, continued

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, and Timely.

Describe specific partnerships or plans to collaborate with other organizations (such as schools, government entities, Tribal governments and 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 has provided and plans to provide to increase and expand volunteer taxpayer assistance services to immigrant, low-income, elderly, and disadvantaged Minnesotans.

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 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. We give additional points to organizations who provide extensive Minnesota tax training.

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 plan to publicize and promote available Minnesota tax credits. What languages do you plan to use? We give additional points to organizations with experience serving demographic groups and communities with historically low claim rates. This includes immigrant communities, limited English-speaking communities, senior communities, low-income communities, Tribal reservations, and rural areas.

Identify the populations you plan to serve. We give additional points to organizations who serve individuals who speak limited or no English, have low income, are age 60 or older, are Indigenous, or have historically low claim rates.

Narrative, continued

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

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, K-12 Education Credit, Renter's Credit, and Homestead Credit Refund (for Homeowners) to taxpayers with historically low claim rates. 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 and 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 has provided and plans to provide to reach taxpayers with historically low claim rates. We give additional points if your partners serve demographic groups and communities with historically low claim rates, including immigrant communities, limited English-speaking communities, senior communities, low-income communities, Tribal reservations, and rural areas.

FY26 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			
Utilities			
Food/Beverages (\$500 limit)			
Other:			
Subtotal			
FY26 TOTAL			

FY26 Budget, Continued

Budget: Explain how you will spend grant funds and why these items will help you 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 available Minnesota tax credits.

FY27 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			
Utilities			
Food/Beverages (\$500 limit)			
Other:			
Subtotal			
FY27 TOTAL			

FY27 Budget, Continued

Budget: Explain how you will spend grant funds and why these items will help you 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 available Minnesota tax credits.

FY26 Budget Proposal — Taxpayer Assistance

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

B. Advertising	Quantity	Cost	Total
Flyers			
Newspaper			
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)			
Utilities			
Other:			
Subtotal			
FY26 TOTAL			

FY26 Budget, Continued

Budget: Explain how you will spend grant funds and why these items will help you 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.

FY27 Budget Proposal — Taxpayer Assistance

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

B. Advertising	Quantity	Cost	Total
Flyers			
Newspaper			
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)			
Utilities			
Other:			
Subtotal			
FY27 TOTAL			

FY27 Budget, Continued

Budget: Explain how you will spend grant funds and why these items will help you 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.