Grant to Provide Volunteer Taxpayer Assistance Services and Tax Credit Outreach

Fiscal Year (FY) 2026-27 Grant Questions

FY26-27 Grant Questions received from the grant webinar on October 23, 2025

Does Minnesota Department of Revenue have, and can they share, information on credits currently claimed? Also, will TaxSlayer have data mining capabilities to isolate on these credits?

Thank you for the suggestion. We are working on ways to provide more general and site-specific data to our partners. We cannot answer on behalf of TaxSlayer.

If we received less funding than requested, should we submit a revised budget and use the same template?

Yes. If your actual grant award is less than the amount you requested, you are required to submit a revised budget and workplan by October 31, 2025. Find the required templates on our grant webpage in the Information and Forms for the FY2026-2027 Request for Proposals (RFP) section.

Can employees be reimbursed at the higher IRS business mileage rate instead of the 14 cents per mile rate for volunteers?

Yes. Employees may be reimbursed up to the IRS standard mileage rate for businesses, which is 70 cents per mile for 2025.

The IRS grant allows funding for quality reviewers' salaries. Has Revenue considered changing its requirements to match?

We review the IRS grant criteria every two years when updating our RFP to ensure our program aligns with federal guidance where possible. While salary funding for quality reviewers is not currently allowed under our grant, we recognize the importance of this support and will continue to explore this option in future updates.

For salary expenses, if an employee works solely on VITA, what documentation do you need for reimbursement?

Supporting documentation for salary reimbursement must include the employee's name, position, pay rate, and a description of the tasks they performed during the reporting period. For example, use a job description or similar documentation that clearly shows the employee's VITA-related duties. You must also include daily timesheets showing the hours worked during the reporting period and proof of payment, such as a paystub or payroll record.

Will reports be submitted in PDF format or Microsoft Forms?

You must complete and submit progress, final, and monthly summary reports through Microsoft Forms.

For the Microsoft Form, can you add a feature so we receive a copy of the form right after submission?

Microsoft Forms does not provide an immediate copy of the form. We will email you a confirmation and PDF copy of your submission.

Are there monthly reporting requirements for the Taxpayer Assistance Grant?

No. We only require progress and final reports for the Taxpayer Assistance Grant. We can monitor site performance by pulling the number of returns filed throughout the filing season.

How do we handle purchases from an online vendor, like Amazon, in terms of getting a receipt?

For standard Amazon purchases, payment is typically made at the time of the order, so the invoice will show the payment method. You could also submit a bank or credit card statement to verify payment.

For Amazon Business accounts, eligible customers may use “Pay by Invoice” or similar net-terms arrangements to place an order and pay later. In those cases, you must provide documentation showing the order and proof of payment.

What would it take to increase the funding limit for volunteer food and beverages?

We understand providing food and beverages is an important way to support and motivate volunteers. We would need to change grant guidelines to increase the current funding limit. An increase might come at the cost of adjusting other important tax site expenses. We’ll continue to consider this feedback in future reviews.

If we give food as the $10 volunteer appreciation gift, does it still count under the overall $500 limit for food and beverages?

Yes. Any food or beverages purchased during the grant period count toward the $500 food and beverage limit.

What are some ideas for volunteer appreciation gifts that are more personal than pens or coffee mugs?

Previous grantees have gifted personalized or handmade items such as t-shirts, candles, or keychains. More gift ideas include plants, ornaments, or other creative items valued at $10 or less per volunteer.

Are we allowed to move a certain percentage (for example 10%) across budget categories such as Equipment and Accessories, Advertising, Salaries, and Other Expenses?

Yes. You may move funds between approved budget categories without submitting a request if the amount you move is under 10% of the category total. If you need to move more than 10%, you must submit a revised budget request using the template on our grant webpage. You can submit revised budget requests at any time during the grant period.

The updated FY27 budget proposal due date is a Saturday, August 15, 2026. Can you confirm that date is correct?

Yes, the due date is correct. If a due date is on a weekend and you are not working that day, you must submit your proposal the business day before. Late report or document submissions can affect eligibility for future funding.

Does this webinar count toward the three required grant trainings?

No. At least one representative from each funded site must attend three of the six required grant training webinars held in December and January. The same requirement applies for FY27.

The required grant trainings focus on technical tax topics, which are separate from the administrative and grant requirement information covered in this webinar.

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.