

MINNESOTA • REVENUE

# Grant Proposal Evaluation Form

## Volunteer Taxpayer Assistance Grant

**Reviewers:** Review the application for how well it meets the evaluation factors from the Request for Proposal.  
 In the Reviewer Score column, assign points up to the maximum points available for each outcome.  
 This form will automatically total the points. Enter any comments on the following page.

Applicant Name:			
	Criteria	Points Available	Reviewer Score
<b>1</b>	Grant proposal clearly states the specifically underserved populations and proposes to serve individuals from _____ categories listed.	15	
<b>2</b>	Grant proposal clearly states how many hours taxpayer assistance services will be provided per week. The higher the average number of service hours proposed per site, the more points awarded.	20	
<b>3</b>	Grant proposal clearly states the period of time during the calendar year taxpayer assistance services will be available. The higher the average number of weeks open per site, the more points awarded.	20	
<b>4</b>	Evaluation of average number of 1040, M1, and M1PR returns prepared per site in the previous filing season or the number of projected returns in combination with the rationale.	20	
<b>5</b>	Grant proposal clearly states previous experience and success in training and recruiting volunteers to prepare accurate returns. It also includes a detailed training plan for the upcoming year.	15	
<b>6</b>	Grant proposal includes a detailed work plan and corresponding budget. The work plan and budget tie together; the proposed expenses are reasonable and represent a well-structured plan.	15	
<b>7</b>	Grant proposal includes a description of how funding will improve volunteer taxpayer assistance services. It also includes specific goals for improving services. Goals are explained well and attainable.	15	
<b>8</b>	Organization adhered to grant policies, procedures, and timelines.	20	
	<b>TOTAL</b>	<b>140</b>	

**Disclaimer:**

1. Before awarding a grant of over \$25,000, we will assess a recent financial statement. Items of significant concern will be discussed with the grant applicant and resolved to our satisfaction before a grant is awarded.
2. Under Minn. Stat. §13.599, all data created as part of the evaluation process will be public data after the evaluation process is completed (for this grant, when all grant agreements have been fully executed).

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Reviewer comments:

## **Grant Proposal Evaluation Form**

### **Volunteer Taxpayer Assistance Grant**

**1. Organization proposes to help individuals in the following populations**

- a) Individuals living in greater Minnesota
- b) Individuals with limited English-speaking abilities
- c) Individuals with disabilities
- d) Seniors
- e) People who are not required to file but benefit from filing a tax return
- f) Other low-income and disadvantaged individuals

**2. Average number of hours organization will spend per week providing volunteer taxpayer assistance services.**

**3. Average number of weeks organization will spend per calendar year (starting February 1) providing volunteer taxpayer assistance services.**

**4. Evaluation of the average number of returns prepared per site in the previous filing season or the number of projected returns in combination with the rationale. The average number of 1040, M1, and M1PR returns will be calculated per site and compared.**

**5. Grant proposal clearly states previous experience and success in training and recruiting volunteers. It also outlines a training plan for the upcoming year.**

Organization demonstrated proficiency in volunteer training and provided a detailed outline for training volunteers in the upcoming year. Examples of a detailed outline may include a comprehensive training schedule and multiple training methods such as lectures, hands on training, checking for understanding, etc. The proposal includes a list of topics, how many hours will be spent on each topic and the delivery method of the training (online vs. classroom). Proposal contains a plan for recruiting new volunteers including organizations from which to recruit, groups that are underrepresented, etc.

**6. Grant proposal has clear continuity between work plan and budget. The work plan and budget tie together; the proposed expenses are reasonable and represent a well-thought out plan.**

Proposal includes a well thought out work plan. Every item in the work plan has appropriate funding associated with it. Examples of a well thought out work plan include the following: proposed salaries are reasonable for position descriptions, equipment requested lines up with number of volunteers and projected number of returns, amount of mileage is reasonable for the location of the site, etc.

**7. Grant proposal clearly states goals and outlines how organization will improve volunteer taxpayer assistance services. If this is the first year providing volunteer taxpayer assistance services, grant proposal clearly identified goals and how they will lead to a successful volunteer taxpayer assistance program.**

Goals are explained well and are attainable by the organization. A plan for improving volunteer taxpayer assistance services is clearly outlined.

**8. Organization adhered to grant policies, procedures, and timelines.**

Previous grant recipients submitted reports before due dates, advertisements were submitted prior to publication (if applicable), additional information was submitted in a timely manner if requested and a steady line of communication was maintained throughout the grant period. New applicants clearly followed all instructions detailed in the RFP, submitted all required grant application documentation prior to the August 26, 2015 deadline, and all questions were submitted prior to the August 19, 2015 deadline.