



California Department of Community Services and Development

2016 Cal EITC Education and Outreach Grant

Bidders Conference

Wednesday, August 24, 2016

Today's Presenters



Sylmia Britt, Community Services Division, Deputy Director



Melanie Ely, Associate Governmental Program Analyst

AGENDA

- Overview of Department of Community Services and Development
- Earned Income Tax Credit (EITC) Background
- Purpose of the Notice of Funding Availability (NOFA)
- Education and Outreach Grant Activities
- Targeting
- Proposal Elements
- Grant Requirements
- Overview of Attachments
- Projected Timeline
- Evaluation Process
- Questions



Department of Community Services and Development (CSD)

Mission

CSD reduces poverty for Californians.

Vision

CSD lead the development and coordination of effective and innovative programs for low-income Californians.

-- Partners Against Poverty! --

How to Ask Questions on Bidder's Conference

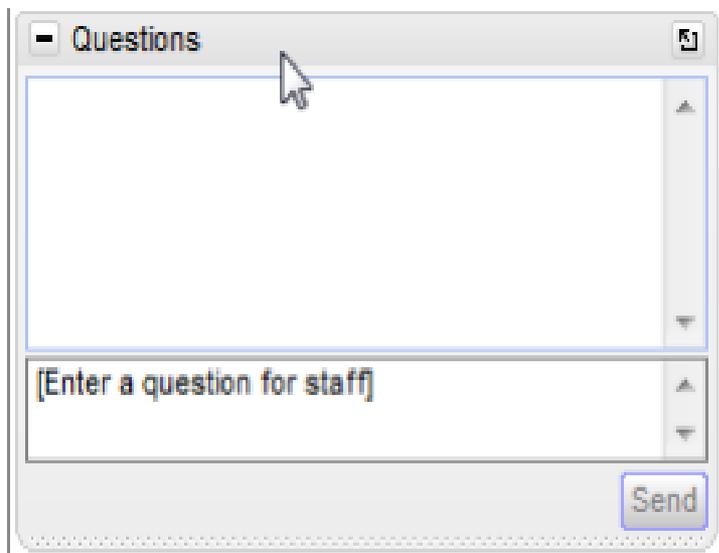
1) Typing Questions In

Questions

If you have any questions during a webinar, you can enter your questions into the Questions pane for the organizer or panelists to answer.

1. Type your question into the Questions pane and click **Send**.

The organizer can choose to answer the question themselves or to assign the question to panelists to answer.



We encourage attendees to ask questions using this option

How to Ask Questions on Bidder's Conference

2) Asking Questions Over the Phone

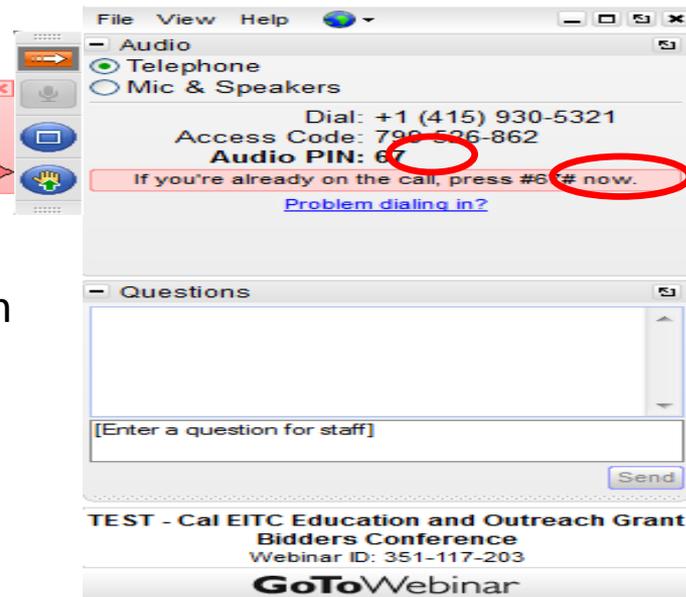
1) Raise Hand



If attendees would like to ask a question, please click the little hand feature. This will enable us to unmute you and allow you to speak. To ask your question(s).*

To enable muting controls, please enter your PIN on your telephone keypad now.

Audio PIN: #67#



*Remember you need to enter audio pin upon dialing in in order to enable audio controls/allow use to hear you.

2) CSD will unmute you and you may ask your question

EITC Background

- **Federal EITC:** Refundable cashback tax credit for low-to-moderate income working individuals and families earning \$53,267 per year or less. EITC reduces tax liability and then issues any unused credits as a cashback refund when a tax return is filed.
- **State EITC:** First enacted in 2015 as the states first-ever California Earned Income Tax Credit (Cal EITC) to help working individuals and families earning less than \$13,870. A tax return must be filed to claim the credit.

Purpose of the Notice of Funding Availability (NOFA)

- Increase awareness of the credit and Volunteer Income Tax Assistance (VITA) program among low-income eligible individuals and families
- Support Cal EITC education and outreach activities

Definitions

Cal EITC Education: Information provided to eligible populations about the program, such as, but not limited to: the purpose, benefits, eligibility criteria, where to go, how to claim the credit at no cost and how to claim past years credits with the goal of increasing the number of eligible California residents claiming the credit.

Federal EITC Education: Information provided to eligible populations about the program, such as, but not limited to: the purpose, benefits, eligibility criteria, where to go, how to claim the credit at no cost and how to claim past years credits.

Cal EITC Outreach: Activities (like strategic grassroots campaigns) intended to increase the number of eligible California residents claiming the credit.

Required Outreach Activities

Web Presence

California Department of Community Services & Development

Home » Services » State & Federal Earned Income Tax Credits

CSD 2016 EITC PSAs

Click here to Listen now

Click here to listen to the 60 PSA

Escuche los anuncios de servicio público en español.

Go to **CalEITC4Me.org** to find out more

Know It!
State and Federal Earned Income Tax Credits (EITC) are cash back tax credits for working individuals and families. For the first time this year, California has established its own Earned Income Tax Credit, the CalEITC. With the combined state and federal credits, you can get up to \$6,000 back by filing your taxes. That's money you can use for rent, utilities, groceries, and other important expenses.

Earn It!
The amount of cash back tax credits you qualify for depends on your income and your family size. You may qualify for the state and federal EITC and not even know it! Under the new California Earned Income Tax Credit (CalEITC), families earning up to \$13,870 may qualify for a cash back tax credit. And, families with up to a maximum income of \$53,267 may receive cash back by claiming the federal EITC on their tax returns. [Visit CalEITC4Me.org to learn more and calculate your cash back tax credit.](#)

CONTRACTING OPPORTUNITY

- Notice of Funding Availability (NOFA) California Earned Income Tax Credit Education and Outreach Grants

EITC REPORTS

- The Costs of Unclaimed Earned Income Tax Credits in California's Economy: UPDATE of the 3rd on the "State Report" (March 2016)
- Let us be the Table Report (March 2016)

Enabling economic opportunity and financial security for California's working families and individuals.

LEARN AND EARN
Find out how much more you could get back in your pocket this tax season.

ESTIMATE MY EITC

KNOW IT - Learn about the Earned Income Tax Credit. Find out what the EITC is, the benefits of the credit and more.

EARN IT - Find out if you are eligible. Use our Calculator to find out if you are eligible and how much your credit could be in 3 easy steps.

GET IT - How to get money back in your pocket. Enter your city, ZIP code or address into our Free Tax Prep Finder to find no-cost help near you.

STATE OF CALIFORNIA Franchise Tax Board

Individuals Businesses Tax Professionals

California Earned Income Tax Credit (Cal EITC)

[Español](#)

California began offering its own Earned Income Tax Credit (Cal EITC) starting with calendar year 2015 tax returns. This is a new refundable tax credit that puts money back in the pockets of California's working families and individuals.

If you owe taxes, the Cal EITC reduces the amount of taxes you might owe and may allow you a refund when you file your taxes. If you do not owe taxes, the Cal EITC tax credit will provide you with a tax refund when you file your taxes.

If you have yet to file your 2015 state return and think you may qualify for Cal EITC, there is still time to file. While the deadline to file was April 18, 2016, all taxpayers receive an automatic extension to file until October 17, 2016. Free help is also available at free tax return prep sites around the state. Find a location near you at [CalEITC4Me.org](#).

If you already filed your 2015 state return and think you may qualify for Cal EITC, you may amend your return. Consider contacting your professional tax preparer, or follow these [instructions](#) to fill out a [Form 5405](#) and [Form 3514](#) to claim the credit.

How much is the credit?

Find your filing status below to see how much you may qualify for, view the [2015 Earned Income Tax Credit Table](#), or use the [CalEITC4Me online calculator](#) to estimate your credit:

Number of Qualifying Children	CA Maximum Income	Cal EITC (up to)	IRS EITC (up to)
None	\$6,580	\$214	\$503
1	\$9,880	\$1,428	\$3,359
2	\$13,870	\$2,358	\$5,548
3 or more	\$13,870	\$2,653	\$6,242

Who qualifies?

This credit is available to California households with adjusted gross incomes of less than \$6,580 if there are no qualifying children, less than \$9,880 if there is one qualifying child, or less than \$13,870 if there are two or more qualifying children.

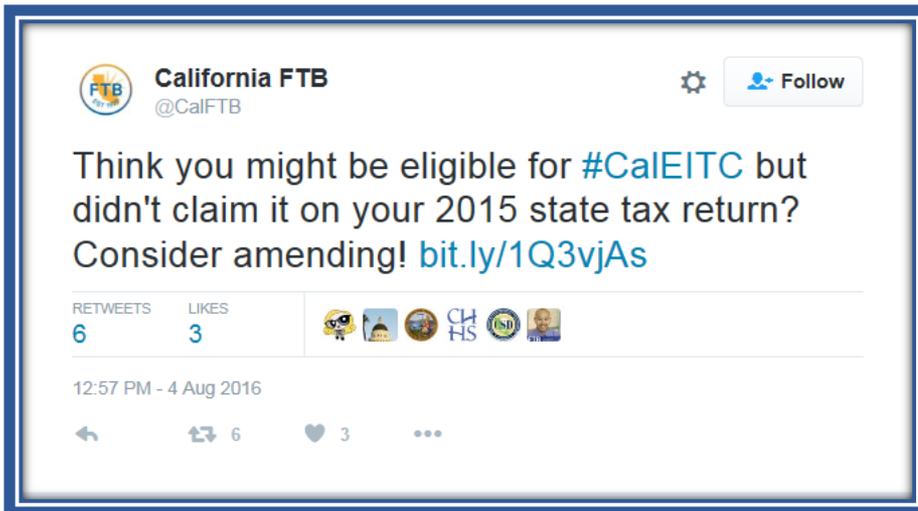
You qualify for Cal EITC if:

- You have wages and adjusted gross income within certain limits. AND
- You, your spouse, and any qualifying children each have a social security number issued by the Social Security Administration that is valid for employment. AND
- You do not use the "married/RDP filing separately" filing status. AND
- You lived in California for more than half the tax year.

Qualification	Description
Earned Income	Eligible sources of earned income from: <ul style="list-style-type: none"> W-2 wages. Salaries, tips. Other employee compensation subject to California withholding. <p>Note: For Cal EITC, earned income does not include income from self-employment.</p>
Maximum Income Limit	Both your adjusted gross income and earned income (defined above) must be no more than:

Required Outreach Activities

Social Media Presence



Recommended Outreach Activities

CSD recommends utilizing various types of outreach to ensure diverse, eligible low-income populations are being reached. Outreach activities may include:

- Local Media
- Distribution of Materials and Messaging
- Community Canvassing (Person-to-Person Contact)
- Outreach Events (Person-to-Person Contact)
- Other

Media

 **To claim new California tax credit, you need to file**
By KCRA Staff
Cal EITC created last year by Gov. Jerry Brown
UPDATED 1:17 PM PST Feb 09, 2016

Text Size: A A A



A volunteer income tax assistance workshop was held Jan. 30 at Grant High School in Sacramento, Calif. Courtesy photo

SACRAMENTO, Calif. — A new tax credit in California is aimed at putting cash in the pockets of low-income working families, and several free tax preparation workshops are now under way in Sacramento and elsewhere in the state to help eligible taxpayers claim this money.

Distribution of Educational Material and Messaging

Critical EITC and eligibility information is available through:

Franchise Tax Board <https://www.ftb.ca.gov/individuals/faq/net/900.shtml>

Internal Revenue Service <https://www.eitc.irs.gov/>

CalEITC4Me <http://caleitc4me.org>

Distribution of Educational Material and Messaging

Informational Call Center

- Add brief messaging to wait time recordings
- Have call center representatives provide information to callers

Community Canvassing

Person-to-person contact in targeted residential neighborhoods and community gathering places to engage individuals and families.

Outreach Events

May include:

- Mega events
- Local businesses
- Bus tours
- Educational forums
- Local, Free Tax preparation and Filing Services, such as VITA sites
- Grocery stores/Libraries
- Food banks
- Churches
- Health care clinics
- Schools
- Etc.

Q & A

Targeting

Four Targeting Elements:

(1) Income Eligibility – must be at or below the Cal EITC filing requirement

Number of Qualifying Children	Maximum Income	Cal EITC (up to)	IRS EITC (up to)
None	\$6,580	\$214	\$503
1	\$9,880	\$1,428	\$3,359
2	\$13,870	\$2,358	\$5,548
3	\$13,870	\$2,653	\$6,242

Targeting

(2) Messaging

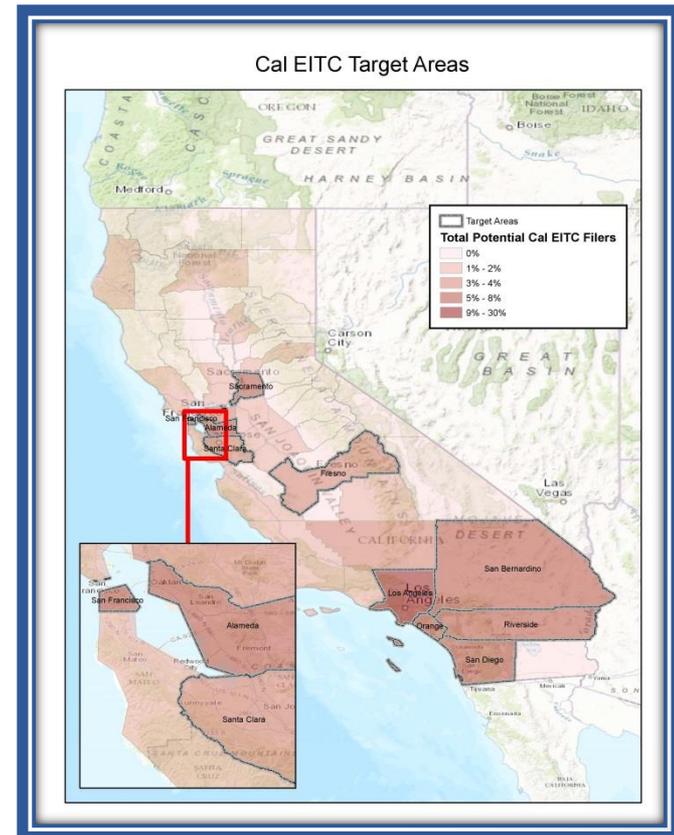
- Availability of state EITC
- Availability of federal EITC
- Free Tax Preparation – VITA
- Where to get more information

Targeting

(3) Geographic Area – areas identified as having the highest proportion of eligible California residents not claiming the credit.

- Target Area 1 – 10: Top 10 Counties

Target Area	Top 10 Counties	Percent of Top 10
1	Los Angeles	41.40%
2	San Diego	11.70%
3	Orange	7.60%
4	Riverside	6.90%
5	San Bernardino	6.50%
6	Sacramento	6.20%
7	Alameda	6.10%
8	San Francisco	5.20%
9	Santa Clara	4.30%
10	Fresno	4.20%
Top 10 Total		100.00%



Targeting

- Target Area 11: Rural Counties

Target Area 11	Percent of Total
Rural Counties	5.48%

- Target Area 12: Statewide

Target Area 12	Percent of Total
Statewide	22.47%

Targeting

(4) IDENTIFYING CHARACTERISTICS: Common characteristics of individuals, who have failed to claim the federal credit, have been identified in past research reports including the 2015 *Update of the Left on the Table Report*. Focus of outreach may include the following common characteristics identified in Table II below.

Table II: Characteristics of Those Failing To Claim
Areas with high concentration of Hispanics
Individuals with lower incomes than required to file a tax return
Individuals participating in Cal Fresh /Supplemental Nutrition Assistance Program (SNAP)
Individuals without qualifying children
Populations with Limited-English Proficiency
Culturally diverse populations and communities

Available Funding

Geography	Percent of Total	Allotment	Rounded
Top 10 Counties	72.05%	\$1,480,000.00	\$1,480,000.00
Rural Counties	5.48%	\$109,508.00	\$110,000.00
Statewide	22.47%	\$410,492.00	\$410,000.00
Total	100.00%	\$2,000,000.00	\$2,000,000.00

CSD anticipates awarding approximately 13 to 18 grants.

Target Areas 1-10: Top 10

Target Area	Top 10 Counties	Percent of Top 10	Allotment By County (Rounded Up)	Maximum Application Amount	Anticipated # of Grants	Contract Award Ranges
1	Los Angeles	41.40%	\$600,000.00	\$300,000.00	2 – 3	\$100,000.00 - \$300,000.00
2	San Diego	11.70%	\$170,000.00	\$170,000.00	1 – 2	\$85,000.00 - \$170,000.00
3	Orange	7.60%	\$110,000.00	\$110,000.00	1 – 2	\$55,000.00 - \$110,000.00
4	Riverside	6.90%	\$100,000.00	\$100,000.00	1	\$100,000.00
5	San Bernardino	6.50%	\$100,000.00	\$100,000.00	1	\$100,000.00
6	Sacramento	6.20%	\$90,000.00	\$90,000.00	1	\$90,000.00
7	Alameda	6.10%	\$90,000.00	\$90,000.00	1	\$90,000.00
8	San Francisco	5.20%	\$80,000.00	\$80,000.00	1	\$80,000.00
9	Santa Clara	4.30%	\$70,000.00	\$70,000.00	1	\$70,000.00
10	Fresno	4.20%	\$70,000.00	\$70,000.00	1	\$70,000.00
Top 10 Total		100.00%	\$1,480,000	N/A	Up to 14	N/A

Target Area 11: Rural Counties

Target Area 11	Percent of Total	Allotment By Area (Rounded Up)	Maximum Application Amount	Anticipated # of Grants	Funding Request Limits
Rural Counties	5.48%	\$110,000.00	\$110,000.00	1 – 2	\$55,000.00 - \$110,000.00

Target Area 12: Statewide

Target Area 12	Percent of Total	Allotment By Area (Rounded Up)	Maximum Application Amount	Anticipated # of Grants	Funding Request Limits
Statewide	22.47%	\$410,000.00	\$410,000.00	1 – 2	\$205,000.00 - \$410,000.00

Applications

Applicants may apply for more than one target area, and for more than one of the top 10 counties, if it possesses the capacity, infrastructure and expertise to serve multiple areas. Applicants must submit a **separate** application for each target area to receive funding.

Q & A

Proposal Elements

(1) Past Experience Conducting Education and Outreach (25 Points)

Up to 5 preference points for past EITC specific education and outreach experience, including the VITA program.

Proposal Elements

(2) Proposed New Cal EITC Education and Outreach Activities

- Part A: Detailed Narrative (20 Points)
- Part B: Scope of Work (20 Points)

40 Points Total

Proposal Elements

(3) Community Partners (15 Points)

(4) Targeting Efforts (20 Points)

Q & A

Inappropriate Use of Funds

- Funds *cannot* be used to supplant existing federal, state, or private funds allocated to conduct the same or similar work. Funds must be used for new or expanded EITC outreach and education.
- Costs are to be allocated for outreach and education activities and are not intended to support organizational overhead. Considering the limited amount of grant funds available, applicants should make every effort possible to minimize overhead/administrative costs and target available funding towards providing direct services for eligible Californians.

Grant Requirements

- Must be spent in a manner that serves the intended purpose of providing EITC education and outreach to eligible California residents
- Funds must be used for cost effective education and outreach activities having a measurable outcome
- Cost sharing or matching funds must be at least 50 percent
- Submission of all attachments listed in Part *B3. Application Requirements*
- Conduct activities and messaging at minimum in both English and Spanish
- Grantees must work together to optimize education and outreach efforts for overlapping taxpayers or geographic areas
- Adhere to all state laws and regulations

Eligibility

- Tax exempt organization or government entity including:
 - Private, non-profit or public organization
 - State or local government agency
 - Federally recognized Indian Tribal Government

Minimum Qualifications

Applicants must demonstrate:

- Knowledge of the Cal EITC and VITA;
- Three (3) years of experience successfully providing, coordinating and implementing education and outreach activities that serve low-income populations;
- Established and trusted relationships with community partners serving low-income populations, preferably with partners who have extensive EITC and tax preparation experience;
- Capacity to implement and deliver all elements of the proposed activities described in the narrative response to this application;
- Ability to provide education and outreach activities appropriate to the language and culture of the targeted population; and
- Ability to collect and report reliable and valid data for all proposed activities.

Notice of Intent to Apply

2016-Cal EITC NOFA	
<p>Department of Community Services and Development</p> <p>Notice of Intent to Apply</p>	
<p>Instructions: Submit this Notice of Intent to Apply via mail, in-person delivery or email, no later than 5:00 p.m. on August 24, 2016.</p>	
<p>Submit by mail or deliver in-person to: Department of Community Services and Development Attn: PDTS, 2016 Cal EITC NOFA 2389 Gateway Oaks Drive, Ste. 100 Sacramento, CA 95833</p>	
<p>Submit by email to: CSBGDIV@CSD.CA.GOV</p>	
<p>Use the following subject line: 2016 Cal EITC NOFA</p>	
Applicant Name:	
Address:	
City:	Zip Code:
Email Address:	
Target Area(s): (Check all target areas you plan to apply for)	<input type="checkbox"/> Target Area 1: Los Angeles <input type="checkbox"/> Target Area 7: Alameda <input type="checkbox"/> Target Area 2: San Diego <input type="checkbox"/> Target Area 8: San Francisco <input type="checkbox"/> Target Area 3: Orange <input type="checkbox"/> Target Area 9: Santa Clara <input type="checkbox"/> Target Area 4: Riverside <input type="checkbox"/> Target Area 10: Fresno <input type="checkbox"/> Target Area 5: San Bernardino <input type="checkbox"/> Target Area 11: Rural Counties <input type="checkbox"/> Target Area 6: Sacramento <input type="checkbox"/> Target Area 12: Statewide
Signature of Designated Person (Executive Director or Chief Executive Officer)	
Print Name and Title:	
Signature:	

Application Requirements

Attachments	Title
A. 1	Cal EITC Education and Outreach Grant Application Narrative Instructions (do not return with application)
A. 2	Cal EITC Education and Outreach Grant Application Narrative Template (25 page limit)
A. 3	Scope of Work (no page limit) <ul style="list-style-type: none"> • CSD 171
A. 4	Budget Forms (both a scored component of the narrative response and a required attachment) (no page limit) Budget Summary CSD 171A Budget Detail CSD 171B
A. 5	Timeline (no page limit)
A. 6	Matching Funds Worksheet (no page limit)
A. 7	2 Letters of Reference (no page limit)
A. 8	<ul style="list-style-type: none"> • Subcontractor Information Worksheet(s) (no page limit) • 1 Letter of Reference for each planned subcontract (no page limit)
A. 9	Payee Data Record (no page limit) <ul style="list-style-type: none"> • STD 204
A. 10	Certification Regarding Lobbying & Disclosure of Lobbying Activities

Q & A

Evaluation Process

- Phase 1 – Pass/Fail
- Phase 2 – Evaluation Team Consensus Scoring
- Applications will be scored against other applications applying for funding in the same target area.

Subsection	Weight	Points
1. Past Experience Conducting Education and Outreach Activities	25%	25
2. Proposed New Cal EITC Education and Outreach Activities <ul style="list-style-type: none">• Narrative• Scope of Work (CSD 171)	40% (20%) (20%)	40 (20) (20)
3. Community Partners	15%	15
4. Targeting Efforts	20%	20
Total	100%	100

Evaluation Process

Preference Points	Points
1. Past Experience Conducting EITC Education and Outreach	5
2. Demonstration of Ability to Provide Education and Outreach in Other Languages In Addition to Required English/Spanish	5
Total	10

Submission Structure

- Follow Application Checklist Order
- One signed Copy
- 4 Exact Copies
- CD ROM or Flash Drive containing PDF entire application
- **By 5 PM on September 12, 2016**

Department of Community Services and Development
Attn: PDTS, 2016 NOFA EITC Application
2389 Gateway Oaks Drive, Suite 100
Sacramento, CA 95833-4246

Projected Timeline

Projected Timeline	
Activity	Date
NOFA Released	August 15, 2016
Bidders Conference	August 24, 2016
Notice of Intent to Apply	August 24, 2016
Deadline for Submitting Questions	August 24, 2016
Questions & Answers Posted on CSD Public Website	August 30, 2016
Applications Due	September 12, 2016
Notice of Awardees Posted	September 29, 2016
Contracts Mailed to Awardees	October 6, 2016
Contracts Due Back to CSD	October 14, 2016
Contract Term	October 17, 2016 through May 31, 2017

Questions

2 Ways to Submit Questions:

- Captured and recorded today
- Emailed questions to CSBGDIV@csd.ca.gov using the subject line: Questions on 2016 NOFA EITC

All questions and answers will be posted to the CSD website <http://www.csd.ca.gov/Resources/ContractingOpportunities.aspx> on August 30.

Q & A

Thank You!