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August 20, 2018

## Notice of Funding Availability California Earned Income Tax Credit

### 2018 Cal EITC Free Tax Preparation Assistance Grant

#### **Important Dates**

NOFA Release Date – August 20, 2018

Bidders Conference – August 29, 2018

Deadline for Submitting Questions – August 31, 2018

Notice of Intent to Apply Due – August 31, 2018

Questions & Answers Posted on CSD Public Website – September 7, 2018

**Deadline for Submitting Applications – September 14, 2018 by 5:00 p.m.**

Notice of Awardees Posted – October 4, 2018

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## Appendix 1: Map of Target Areas

## Part A: Free Tax Preparation Assistance Grant Overview

### 1. Department Overview

Under the umbrella of the California Health and Human Services Agency, the Department of Community Services and Development (CSD) partners with a network of community-based private nonprofit and local government organizations dedicated to helping low-income families and individuals achieve and maintain self-sufficiency, meet their home energy needs, and reduce their utility costs through energy efficiency upgrades and access to clean renewable energy.

CSD's mission is to reduce poverty for Californians by leading in the development and coordination of effective and innovative programs for low-income residents. Additional information about CSD can be found online at [www.csd.ca.gov](http://www.csd.ca.gov).

### 2. Background

The Earned Income Tax Credit (EITC) is widely recognized as one of the nation's most powerful resources for lifting low-income people out of poverty. EITC provides a refundable cashback credit to low-to-moderate income working individuals and families when they file their tax return. EITC delivers a much-needed income boost, helping people meet basic needs, while at the same time encouraging work. According to the 2018 [The Costs of Unclaimed Earned Income Tax Credits to California's Economy: Update and Expansion of the "Left on the Table" Report](#), hundreds of thousands of eligible Californians fail to claim the federal EITC each year, leaving a reported \$1.9 billion unclaimed. The forgone economic impacts result in lost business sales, job growth, wages and labor income, and tax revenue for state, county, and city governments.

In 2015, Governor Jerry Brown and the California legislature established the California Earned Income Tax Credit (Cal EITC), extending a new cashback credit to working Californians. The creation of the Cal EITC, when combined with the federal EITC, increased the potential value of the tax credits for low-income families to over \$6,000. In 2017, 1,388,516 Cal EITCs were issued totaling almost \$324.7 million with an average credit of \$234<sup>1</sup>.

To maximize the participation and claiming of Cal EITC to eligible Californians, the 2017/2018 California State Budget Act expanded the age requirements for the credit to allow individuals 18 to 24 years of age and over 65 years to claim the Cal EITC. The Budget Act also appropriated ten million dollars to the Franchise Tax Board (FTB) to increase awareness and provide free tax preparation assistance. Of the amount appropriated, five million dollars was allocated for Cal EITC education and outreach activities, and \$4.9 million was allocated to support free tax preparation assistance. Also, \$100,000 was allotted for the evaluation of outreach strategies used to reach targeted populations. CSD has partnered with FTB to make grant funds available for community-based, free tax preparation assistance efforts under this Notice of Funding Availability (NOFA). A separate NOFA was released to make grant funds available for education and outreach.

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<sup>1</sup> Franchise Tax Board Cal EITC Total Statistics; Run date: 7-2-18

### 3. Purpose of the Notice of Funding Availability

The purpose of this NOFA is to support free tax preparation assistance among eligible, low-income Californians. The funding will build upon existing efforts to reach eligible populations that would benefit from no-cost tax preparation assistance and filing. The grant funds will be used to support the expansion of an organization's existing activities. Activities must connect low-income people with local free tax preparation assistance sites or online resources that help people file their taxes at no cost. Funding will support new or expanded activities and may not replace or supplant existing funding sources.

### 4. Goal and Objectives

The goal is to increase access to free tax preparation assistance services for eligible, low-income Californians. This will be achieved by expanding the capacity and infrastructure of existing free tax preparation assistance administrators through extended site offerings, extended hours of operation, increased staffing, improved outreach, and increased volunteer recruitment and retention campaigns.

### 5. Codes of Conduct

To establish the greatest degree of public trust, all free tax preparation assistance volunteers have a responsibility to provide quality customer service and uphold the highest ethical standards. All volunteers must adhere to the following standards of conduct:

- Do not accept payment or solicit donations for federal or state tax return preparation.
- Do not solicit business from tax filers assisted or use knowledge gained (from their tax information) about tax filers for any direct or indirect personal benefit for the volunteer or any other specific individual.
- Do not knowingly prepare false returns.
- Do not engage in criminal, dishonest, or other conduct deemed to have a negative effect.
- Treat all tax filers in a professional, courteous, and respectful manner.

### 6. Eligibility Requirements

To be eligible for funding under this NOFA, applicants must meet the following requirements:

- Be a tax-exempt organization or government entity, including:
  - Private, nonprofit, or public organization that qualified for and received an Internal Revenue Service (IRS) determination letter confirming the organization's tax exemption under Section 501 of the Internal Revenue Code;
  - A local government agency (state agencies are ineligible for funding);
  - A federally recognized Indian Tribal Government; or
  - A registered business entity with the California Secretary of State.
- Be an existing Volunteer Income Tax Assistance (VITA) program administrator, maintain sub-grants with existing VITA program administrators, or have an existing or prior relationship with a free tax preparation assistance provider;

- Be eligible to receive public funds (A list of entities that have been declared ineligible to receive government funds can be found at <https://www.sam.gov>); and
- Be in good standing with federal and state administering grant issuing agencies.

The applicant that applies on behalf of a group of organizations is responsible for ensuring all participants within their coalition adhere to the NOFA requirements. Effective monitoring and communication processes are required to ensure adherence to both financial management and grant requirements. Applicants are responsible for ensuring coalition members understand the role they play in delivering a successful free tax preparation assistance site and the processes by which funds are requested and distributed.

## 7. Minimum Qualifications

To support free tax preparation assistance activities, applicants must demonstrate:

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

## 8. Available Funding

A total of \$4.9 million is available to support free tax preparation assistance activities. Funds will be awarded to grantees serving low- to moderate-income individuals and families across the state. Funding allocations are based on 11 target areas which are described below.

An applicant may apply for more than one target area. Applicants must submit a separate application for each target area to receive funding. Each application is considered a single, standalone application and should be customized to meet the needs of the target area.

### Target Area 1 – 10: Top 10 Counties

Target Areas 1 through 10 are counties identified as having the highest proportion of eligible California residents who will benefit from free tax preparation assistance. Using Census data, target counties were identified by considering the number of potentially eligible Californians with incomes at approximately the income level associated with the federal EITC and the federal VITA eligibility standards. The Top 10 counties are identified below and in further detail in *Appendix 1: Map of Target Areas*.

Target Area	Top 10 Counties
1	Los Angeles
2	San Diego
3	Orange
4	Riverside
5	San Bernardino
6	Sacramento
7	Alameda
8	Santa Clara
9	Fresno
10	Kern

Target Area 11: Statewide

Target Area 11 grantees will serve eligible residents statewide. The statewide area will provide coverage to the broadest audience, reaching the largest number of eligible Californians through a variety of strategies. Thus, grantees may focus on activities designed to make an impact on the largest populations throughout the state including, but not limited to: hosting group events, new and expanded sites, expanded hours of operation, etc.

Statewide grantee activities are also aimed at building sustainable infrastructure to support ongoing efforts for free tax preparation assistance activities. The statewide grantees are expected to provide support in relation to training and technical assistance. Training activities should focus on large scale efforts to organize, place, and certify volunteers to prepare taxes according to IRS standards. Statewide grantees should strongly consider incorporating sub-grantees into their strategies to have the largest impact possible and meet the unique needs of local communities. Statewide coverage includes all Target Areas.

Funding Allocations

Funding allocations, anticipated number of grants, and funding limits are provided in the tables below. Funding will be distributed to awarded applicants on a monthly reimbursement schedule upon receipt of submitted expenditures and progress reports.

Geography	Funding Allotment
Top 10 Counties	\$3,477,000
Statewide	\$1,423,000
Total	\$4,900,000

CSD expects to award more than one grant to Target Area 1 and Target Area 11 based upon the amount of funding available for these Target Areas. Below is a breakdown of the funding allotments for each target area. Applicant’s budget (CSD 842A and CSD 842B) must reflect the

full contract award. Note the budget is not a scored component of the NOFA.

Target Area	Top 10 Counties	Allotment by County	Anticipated # of Grants	Contract Award
1	Los Angeles	\$1,377,000	3	\$445,600
2	San Diego	\$399,000	1	\$399,000
3	Orange	\$312,000	1	\$312,000
4	Riverside	\$293,000	1	\$293,000
5	San Bernardino	\$271,000	1	\$271,000
6	Sacramento	\$220,000	1	\$220,000
7	Alameda	\$176,000	1	\$176,000
8	Santa Clara	\$153,000	1	\$153,000
9	Fresno	\$151,000	1	\$151,000
10	Kern	\$125,000	1	\$125,000
11	Statewide	\$1,423,000	2	\$711,500

9. Inappropriate Use of Funds

The following restrictions apply to grants made under this funding:

- Funds cannot be used to pay volunteers. Note: Grantees may reimburse volunteers for travel costs (e.g. mileage reimbursement) to meet demand in underserved areas.
- Funds cannot be used to purchase food.
- Funds cannot be used to supplant existing federal, state, or private funds allocated to conduct the same or similar work.
- Funds may not be used for any political or legislative advocacy work, nor to promote organizations, names, etc. of grantees.
- Costs are to be allocated for NOFA activities and are not intended to support organizational overhead.
- Applicants should make every effort possible to minimize overhead/administrative costs and target available funding towards providing direct services for eligible Californians.

10. Expected Number of Awards

CSD anticipates awarding a total 14 grants from this NOFA, subject to availability of funds and the quality of applications received. CSD reserves the right to make fewer or additional awards under this announcement.

11. Grant Requirements

Grant requirements include, but are not limited, to the following:

- Funds must be spent in a manner that serves the intended purpose of providing free tax preparation assistance to eligible California residents.
- Grant funds must be used for new or expanded free tax preparation assistance efforts.

Grant funds are not intended to replace or supplant existing free tax preparation assistance funds.

- Submission of all application packet documents by the due date.
- Grantees should provide translation services for eligible filers, as needed.
- Grantees must comply with programmatic and fiscal reporting.
- Grantees must participate in monthly coordination calls with CSD and awarded grantees.
- Grantees must possess insurance by the start of the contract term. Insurance requirements may include self-insurance, workers' compensation insurance, commercial or government crime coverage (fidelity bond), general liability insurance, and vehicle insurance. Specific requirements will be outlined in the awarded applicant's contract.
- Grantees must provide volunteer tax preparation assistance services free of charge.
- Grantees must file all eligible returns electronically.
- Grantees must ensure volunteers are properly trained to the level of returns they prepare; and must monitor the quality and technical proficiency of volunteers on an on-going basis.
- Limited funds may be utilized to purchase equipment to support the filing of taxes for eligible filers. However, every effort should be made to access in-kind equipment from the IRS - Stakeholder Partnerships, Education and Communication manager, or leveraged through other partnerships before using grant funds for this purpose.
- Training offered through the IRS or the FTB should be accessed to train volunteers when feasible.

#### 12. Contract/Funding Term

The anticipated contract term is November 1, 2018 through June 30, 2019.

#### 13. Letters of Reference

Applicants are required to submit two letters of reference with their application packet. Letters are required to be on the referring organization's letterhead and dated within a twelve-month period. References should be from organizations that are familiar with the applicant's qualifications, experience, and past performance on free tax preparation assistance-related work.

#### 14. Use of Planned Subcontractors

The use of subcontractor(s) is allowed if the subcontract helps support NOFA activities. CSD will make payments to awarded organizations directly on a reimbursement schedule. Grant awardees will be responsible for paying subcontractors. CSD will pay grant awardees using the state's reimbursement/payment system per the information provided in the Payee Data Record (STD 204). Selected applicants and their subcontractors are subject to all state laws and regulations.

#### 15. Projected Timeline

The projected timeline below will be used for the NOFA application submission, evaluation, and contract award process.



Activity	Dates
NOFA Released	August 20, 2018
Bidders Conference	August 29, 2018
Deadline for Submitting Questions	August 31, 2018
Notice of Intent to Apply	August 31, 2018
Questions & Answers Posted on CSD Public Website	September 7, 2018
<b>Deadline for Submitting Applications</b>	<b>September 14, 2018</b>
Notice of Awardees Posted	October 4, 2018
Contracts Sent to Awardees	October 9, 2018
Contracts Due Back to CSD	October 16, 2018
Contract Term	November 1, 2018 through June 30, 2019

Applicants receiving an award are asked to return their contracts to CSD as expeditiously as possible, considering the projected timeline. Grantees are expected to be ready and able to begin work on the first day of the contract term.

## Part B: Application Preparation & Submission

### 1. Bidders Conference

Potential applicants are strongly encouraged, but not required, to participate in a Bidders Conference regarding the grant application (2018-Free Tax Preparation Assistance Grant) on **August 29, 2018**. The webinar registration link is available at:

<https://attendee.gotowebinar.com/register/8928091984984805377>.

### 2. Questions

Applicants may submit additional questions regarding any part of this NOFA, including technical questions and required attachments, which must be submitted in writing. Questions must be emailed to [CSBGDiv@csd.ca.gov](mailto:CSBGDiv@csd.ca.gov) using the following subject line: Questions on 2018 - Free Tax Preparation Assistance Grant.

When submitting question(s), please reference the section, page number, and other useful information for identifying the specific area of concern. **All questions must be received before 5:00 p.m. on August 31, 2018.**

Questions and answers will be posted by CSD on **September 7, 2018**, on the CSD Public website

under “Contracting Opportunities” at <http://www.csd.ca.gov/Resources/ContractingOpportunities>. Questions will also be captured from the Bidders Conference.

3. Notice of Intent to Apply

Interested applicants should submit a Notice of Intent to Apply. The Notice of Intent to Apply form is located on the CSD Public website under “Contracting Opportunities” at <http://www.csd.ca.gov/Resources/ContractingOpportunities>. **Complete and submit per the instructions on the form by 5:00 p.m. on August 31, 2018.**

The Notice of Intent to Apply is not required, but interested applicants are strongly encouraged to submit the form as soon as the applicant believes it will be applying for the grant. The Notice of Intent to Apply may be submitted via email at [CSBGDiv@csd.ca.gov](mailto:CSBGDiv@csd.ca.gov) or by U.S. Mail to:

California Department of Community Services and Development  
 Attn: 2018 Free Tax Preparation Assistance Grant Application  
 2389 Gateway Oaks Drive, Suite 100  
 Sacramento, CA 95833-4246

4. Application Packet Requirements

Applicants must submit all documents listed below by the due date. The order indicates how the documents should be ordered upon mailing them to CSD. Title is the official title of the form and its form number. Please note that the Free Tax Preparation Assistance Grant Application Narrative Template (CSD 841) has a 20-page limit. All other forms do not have page limits. All NOFA documents are located at: [www.csd.ca.gov](http://www.csd.ca.gov).

Stack Order	Document Title
<b>N/A</b>	Application Packet Instructions and Document List (do not return with application)
<b>1</b>	Application Cover Sheet (CSD 840)
<b>2</b>	Application Narrative Template (CSD 841) - 20-page limit
<b>3</b>	Scope of Work (CSD 843)
<b>4</b>	Budget Forms <ul style="list-style-type: none"> <li>• Budget Summary (CSD 842A)</li> <li>• Budget Detail (CSD 842B)</li> </ul>
<b>5</b>	2 Letters of References
<b>6</b>	Payee Data Record (STD 204)
<b>7</b>	Contractor Certification Clauses Form (CCC-04/2017)

5. Application Pass/Fail Review

All applications received by the deadline will undergo an initial pass/fail review prior to evaluation to ensure completeness and adherence to the specifications and requirements detailed in this NOFA, including the following:

- One original **single-sided** application packet plus four exact copies (use a paper or binder clip to bind each of the packets – **do not staple any parts of the application or attachments**);
- Flash Drive with an electronic copy of all application documents (in PDF format);
- The requested funding within the funding limits;
- All application documents from the table above (1-7) have been completed by the due date; and
- Full contact information and applicable signatures on every document.

CSD may disqualify and not score applications that receive a “fail” mark. **Late applications will be rejected and will not be considered for funding.**

6. Application Submission Instructions

Only hard copy paper submissions will be accepted. **Applications must be received by 5:00 p.m. on September 14, 2018.** The full application packet must be sealed, addressed, and shipped to:

California Department of Community Services and Development  
Attn: 2018 Free Tax Preparation Assistance NOFA Application  
2389 Gateway Oaks Drive, Suite 100  
Sacramento, CA 95833-4246

The following delivery methods are acceptable:

- U.S. Mail
- Express Delivery
- Hand Delivery

## Part C: Evaluation Process

1. Scoring

The table below summarize the available points for the scored documents of the application packet: The Application Narrative and the Scope of Work. Scores will be assigned per the points identified in the table below.

Document Title	Total Possible Points	Target Area 11 Statewide Only
Application Narrative Template (CSD 841)	70	70
	N/A	5 Target Area 11 – Statewide Only
	5 Possible Preference Points	5 Possible Preference Points
Scope of Work (CSD 843)	40	40
<b>Total</b>	<b>115</b>	<b>120</b>

Evaluators will assign points to all scored components using the scoring criteria below.

Rating	Score	Target Area 11 Statewide Only	Ranking
Exceeds all requirements	103 - 115	108 - 120	Exceptional
Excellent ability to meet all requirements	92 – 102	96 - 107	Outstanding
Expected to meet all requirements	80 – 91	84 - 95	Good
Capable of meeting all requirements	69 – 79	72 - 83	Fair
May not be able to meet all requirements	57 – 68	60 - 71	Poor
Not likely to meet all requirements	56 or below	59 or below	Fail

## 2. Proposal Elements Evaluation

The documents in the table above will be reviewed and scored by an Evaluation Team. Scoring criteria is designed to assess the quality of the proposed project and to determine the likelihood of success. **With preference points, the maximum number of possible points is 115, or 120 for Target Area 11 – Statewide applicants.**

Applicants must receive a final total score of at least 69 points (72 points for Target Area 11 – Statewide), including preference points, to be placed into the rank order to be considered for funding.

The Evaluation Team will use a consensus scoring methodology, where one score is awarded per the team’s collective assessment. Applications will be scored against each other in each of the 11 Target Areas. For example, Target Area 1 (Los Angeles County) applicants will be evaluated

against other applications applying for funding in Los Angeles County only. The scores from each subsection will be added to determine the preliminary total score.

Applicants are required to provide a detailed narrative in the Application Narrative Template (CSD 841) and Scope of Work (CSD 843) to address the following proposal elements:

3. Application Narrative (70 Total Possible Points)

A total of 70 points is possible for the Application Narrative Template (CSD 841). The Application Narrative Template includes: Experience Conducting Free Tax Preparation Assistance, Strength of Program, Free Tax Preparation Assistance Target Populations, and Program Measures sections detailed below.

Experience Conducting Free Tax Preparation Assistance – 25 points

Describe your organization’s experience coordinating and/or operating volunteer tax return preparation assistance services for eligible taxpayers and/or experience coordinating with partners who can leverage outreach and direct clients to free tax preparation assistance sites. Present a detailed description of your organization’s:

- a) Experience conducting free tax preparation assistance to low-income individuals and families in the specified Target Area for which you are applying, including the number of years.
- b) Experience conducting outreach to eligible populations, including (if applicable) experience directing clients to free tax preparation assistance.
- c) Operational readiness and expertise in conducting, budgeting, and implementing similar scale free tax preparation assistance activities.
- d) Performance as it relates to tax returns completed on an annual basis for the past three years. Address any reduction in services from year-to-year in the table provided in the template.

Tax Year	Total Tax Returns Completed
2015	
2016	
2017	
2018 (PROJECTION)	

Strength of Program - 20 points

- a) Describe your organization’s strategies for volunteer recruitment, retention, and training. Plans should include, but are not limited to:

- Plan to recruit new volunteers to support the expanded services;
  - Method that you will use to train volunteers, such as self-study or classroom training, and the training materials used whether developed by you or the IRS;
  - Any unique training curriculum you have developed or identified, such as training based on a position held (e.g. tax return preparers, site coordinators, or other position related to tax return preparation); and
  - Strategies utilized to retain volunteers.
- b) Describe your organization’s outreach plan or how you will make potentially eligible individuals aware of the free tax preparation assistance services. Be sure to address:
- Messages, methods, materials, and channels (media, website, etc.) to be used to reach the eligible populations and areas you will target.
- c) Describe your organization’s plan to expand VITA services in your area. Be sure to address:
- Expansion to new sites or extending hours, etc. to increase free tax preparation assistance services.

**Free Tax Preparation Assistance Target Populations - 20 points**

- a) Describe your organization’s plans to focus on extending services to eligible populations and hard-to-reach/underserved areas. Be sure to:
- Describe the need for free tax preparation assistance services in the community, county, or Target Area in which you are seeking grant funds.
  - Discuss the underserved population, underserved geographic area, and/or hard-to-reach area your organization’s program will target.
  - Any services being provided for special populations (e.g., interpreters for individuals hard of hearing, or with Limited English Proficiency).
- b) Provide the total number of volunteers you had in the last three tax years that were used in support of delivering free tax preparation assistance services, and the anticipated number to be used during this tax year.

Tax Year	Total Volunteers
2015	
2016	
2017	
2018 (PROJECTION)	

**Program Measures – 5 Points**

- a) Describe the means your organization has in place to capture data, measure results, and provide reports including the tools and systems used for data analysis.

**Target Area 11 – Statewide Applicants Only – 5 Points**

- a) Identify your organization’s free tax preparation assistance objectives and additional program goals for the award year. Your organization’s additional program goals are those that are over

and above the Free Tax Preparation Assistance Grant objectives, as stated above. Goals should be specific and measurable. Some examples may include: use of eBuses to reach underserved areas, large group events, trainings, or financial education/asset building programs.

*(This item will only be scored against other Target Area 11 Statewide applicants – 5 points)*

4. Preference Points (5 Points)

Up to five preference points will be provided to organizations with experience providing financial education and asset building activities in conjunction with free tax preparation assistance. Some examples of financial education and asset building activities may include Individual Development Accounts, credit counseling workshops, home buyer workshops, assistance in opening bank accounts, foreclosure workshops, identity theft workshops, etc. Be sure to provide the number of sites providing financial education and asset building services.

5. Scope of Work (40 Total Possible Points)

Complete the attached Scope of Work (CSD 843) and include the proposed activities described in the table, projected outcomes, and performance measurements. Activities must have measurable and pragmatic outcomes for which your organization or entity can reliably collect and validate.

Applicants must include:

- Identifying information on the new or established site(s) to be expanded (site address, Site Identification Number [SIDN], etc.);
- Existing and projected hours of operation at each site;
- Number of returns projected to be completed at each site; and
- Services to support Limited English Proficiency filers and other special focus populations.

## Part D: Contract Award Process

1. Contract Award Information

Contracts will be awarded based on final scores and available funding. Applicants shall agree to comply with the terms and conditions of a contractual agreement with CSD. CSD reserves the right to award less than the amount available through this funding opportunity based on the quality and number of applications received.

2. Appeal Process

All funding decisions are made at the sole discretion of CSD and all decisions are final. There is no appeal process.

3. CSD Reservations

CSD reserves the right to:

- Modify, amend, cancel, or terminate this NOFA at any time by issuance of an

addendum or notice;

- Not make any awards pursuant to this NOFA;
- Make an award under the NOFA in whole or in part;
- Disqualify any applicant whose application fails to conform to the requirements of this NOFA;
- Change any of the scheduled dates in the Projected Timeline with notice; and
- Accept modifications to the proposed budget during contract negotiations to align with the Scope of Work in compliance with program requirements.

4. Public Records Act

Upon execution of award(s), all documents submitted in response to this NOFA will become property of the State of California and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.).

**-- END NOFA --**