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August 15, 2018

Notice of Funding Availability
California Earned Income Tax Credit
Education and Outreach Grant

2018 Cal EITC NOFA

Important Dates

NOFA Release Date – August 15, 2018
Bidders Conference – August 23, 2018
Deadline for Submitting Questions – August 24, 2018
Notice of Intent to Apply Due – August 24, 2018
Questions & Answers Posted on CSD Public Website – August 28, 2018
Deadline for Submitting Applications – September 5, 2018 by 5:00 p.m.
Notice of Awardees Posted – September 26, 2018

Serving Low-Income Families Through Community Partner

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Appendix 1

Part A: EITC Education and Outreach 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 private non-profit and local government community-based organizations (CBOs) 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.

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 as well as 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 families. 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 EITC credits were issued totaling almost \$324.7 million with an average credit of \$234¹.

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 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 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 Cal EITC Education and Outreach efforts under this Notice of Funding Availability (NOFA). A separate NOFA will be released to make grant funds available for free tax preparation assistance.

¹ Franchise Tax Board Cal EITC Total Statistics; Run date 7/2/2018

Awarded Cal EITC Education and Outreach grantees will embark on efforts to further increase the number of Cal EITC eligible filers reached. The efforts employed will include: outreaching towards the newly eligible population and those that have never filed their taxes, coordinating with public benefits agencies, and increasing efforts to ensure eligible Californians file their taxes for free at a free tax preparation assistance site. CSD will employ lessons learned from previous grants to improve existing infrastructure and capacity to administer the grant funding to organizations and entities to deliver education and outreach to low-income individuals and families.

3. Purpose of the NOFA

The purpose of this NOFA is to support Cal EITC education and outreach activities and to increase awareness of the credit and free tax preparation assistance programs among low-income individuals and families. Educational efforts for Cal EITC should also include information on the federal EITC program, as many taxpayers will be eligible for both. CSD seeks to engage established organizations that maintain an existing community presence and trusted relationships, demonstrate extensive experience conducting similar outreach campaigns, and regularly engage culturally diverse hard-to-reach populations. To this end, activities must be conducted in a culturally and linguistically appropriate manner that effectively meets the needs of the target population and community served.

Activities must connect low-income people with local free tax preparation sites or online resources that help people file their taxes at no-cost and claim the EITC credit, such as free online tax preparation (e.g., FTB's Cal File). Grantees will work closely with local free tax preparation sites to ensure that when conducting education and outreach activities, eligible Californians will know where to locate and when to access the nearest free tax preparation service. Applicants should conduct cost effective education and outreach that will inform community members about the availability of the Cal EITC and the importance of filing their taxes. Funding will support new or expansion activities and may not replace or supplant existing funding sources.

4. Goal and Objectives

Goal:

- To increase awareness about the Cal EITC and the free tax preparation assistance program among eligible low-income individuals and families. These efforts will also result in an increased awareness of the federal EITC credit.

Objectives:

- Partner with trusted organizations in the community to implement effective education and outreach activities.
- Deliver education and outreach that promotes and maximizes awareness of the Cal EITC and free tax preparation assistance programs. Information should also be provided on the federal EITC.
- Target eligible populations residing in areas identified as having a high percentage of unclaimed credits.

- Disseminate clear, accurate, and consistent information to target audiences, including culturally diverse hard-to-reach populations, to increase awareness of Cal EITC and the free tax assistance program in English and other languages, as applicable.
- Motivate eligible low-income individuals and families to file and receive the Cal EITC credit, which includes providing information on local, free tax filing services.
- Provide data on outreach efforts to support an evaluation of the most effective outreach strategies to reach the targeted populations.

5. Targeting

Outreach shall be targeted to low-income eligible Californians per the following targeting requirements:

i) Income Eligibility:

Target individuals and families with incomes at or below the Cal EITC filing requirement based on the income limits established for the 2018 tax year. 2018 eligibility guidelines are provided in the table below. For example, for the 2018 tax year, Cal EITC income limits for a family of two or more qualifying children is \$22,309. Cal EITC has recently expanded to include young adults ages 18 to 24 and seniors who are aged 65 and older. Applicants must detail their plans in the Scope of Work (CSD 171) and Application Narrative Template (CSD 171ANT) to reach these Cal EITC eligible Californians.

| Table 1: 2018 Cal EITC Income Eligibility |
|---|
| \$15,008 if there are no qualifying children |
| \$22,322 if there is one qualifying child |
| \$22,309 if there are two or more qualifying children |

ii) Messaging:

At minimum, education and outreach activities must be provided in English and Spanish. Activities shall be conducted in additional languages, as appropriate, to engage culturally diverse populations in targeted areas. Attention should be given to strategies that engage in-language (non-English language) media. Additionally, grantees must include information in their education and outreach efforts on where no-cost tax preparation assistance is available and how to locate local free tax preparation assistance sites. Grantees will be expected to report monthly on outcomes resulting from any collaboration with local free tax preparation assistance programs. Grantees should also include information about the federal EITC in their education and outreach efforts.

Efforts should be made to use uniform messaging statewide. To achieve this, grantees should utilize the example education and outreach collateral materials provided through the Cal EITC4ME website at <http://caleitc4me.org>.

Critical outreach and eligibility information is also available through the following implementing

agencies and websites and should be referenced as a resource:

- Franchise Tax Board: <https://www.ftb.ca.gov/individuals/faq/net/900>
- Internal Revenue Service: <https://www.eitc.irs.gov>

All messaging delivered as a part of this effort should be culturally sensitive and customized to the population in which the education and outreach materials are being distributed. Messaging should encompass, at a minimum, the following elements and target populations:

- Availability of state EITC
- Availability of federal EITC
- Free Tax Preparation
- Californians who have never claimed the EITC
- Self-employed workers
- Young adults ages 18-24
- Seniors ages 65 and older
- Workers with incomes up to \$22,322
- Californians whose low income does not require them to file taxes
- Where to get more information

iii) Geographic Area:

Education and outreach shall be provided to areas identified as having the highest proportion of eligible California residents not claiming the credit. Target Areas are identified in Section 7 (Available Funding) and Appendix 1: Maps of Target Areas.

iv) Identifying Characteristics:

Common characteristics of individuals who have failed to claim the EITC have been identified in past research reports, including the Left on the Table Report and Cal EITC Particularly Benefits Children of Color and Women². Focus of outreach may include the following common characteristics identified in Table 2 below.

| Table 2: Characteristics of Those Failing to Claim |
|--|
| Areas of high concentration of Hispanics |
| Individuals with lower incomes than required to file a tax return |
| Parents (particularly mothers) of Children of Color |
| Individuals participating in Cal Fresh / Supplemental Nutrition Assistance Program |
| Individuals without qualifying children |
| Populations with Limited English Proficiency |
| Culturally diverse populations and communities |

² For Update on the Left on the Table Report, go here: <http://www.csd.ca.gov/Resources/Reports.aspx>. For Cal EITC Benefits Children of Color and Women report, go here: <http://calbudgetcenter.org/blog/caleitc-particularly-benefits-children-color-women/>.

6. Education and Outreach

Activities conducted under this funding opportunity must align with the following 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.

Outreach activities are listed below. Other types of innovative outreach not specifically listed are allowed, per CSD approval, and encouraged if the applicant can clearly demonstrate the ability to implement the proposed outreach based on past success and/or research. Activities with a ✓ indicate activities required of all grantees.

| Required | EITC Outreach Type | Activity |
|----------|--------------------|---|
| ✓ | Web | <ul style="list-style-type: none"> • Create an EITC-specific website/web page • Host web banner on website • Add educational information and updates about the credits and free tax preparation assistance to website • Provide links to Cal EITC educational materials, tools, calculators, maps, etc. |
| ✓ | Social Media | <p>Utilize social media outlets to disseminate educational messages, share success stories, and inform the public about outreach events in targeted counties and local communities. Social media channels may include but are not limited to:</p> <ul style="list-style-type: none"> • Facebook/Instagram • Twitter |

| | | |
|---|----------------------|--|
| ✓ | Canvassing | <p>Make contact in targeted residential neighborhoods and community gathering places to engage individuals and families in one-on-one interactions.</p> <p>Canvassing options may include traditional door-to-door type activities or may be achieved through text messaging campaigns/phone banking to reach potentially eligible Californians.</p> |
| | Media | <p>Educate through media outlets including:</p> <ul style="list-style-type: none"> • Print • Radio • TV (e.g. solicit local news coverage and participate in interviews to educate viewers in targeted areas) • Internet/Website Ads • Social Media Promoted/Boosted Ads |
| | Collateral Messaging | <p>Distribute messaging in multiple languages as appropriate for the target audience and demographics through the following mediums:</p> <ul style="list-style-type: none"> • Flyers/Brochures • Direct mailers • Newsletters |
| | Group Events | <p>Host or participate in coordinated outreach events to engage groups of eligible people (more than one individual/family) at places like:</p> <ul style="list-style-type: none"> • Community gatherings/Resource fairs • 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 • City Council Meetings |
| | Other | <ul style="list-style-type: none"> • Other effective outreach strategies |

At minimum, education and outreach activities must be provided in English and Spanish. Activities shall be conducted in additional languages, as appropriate, to engage culturally diverse populations in targeted areas. Attention should be given to strategies that engage in-language (non-English language) media.

7. Available Funding

A total of five million dollars is available to specifically support Cal EITC education and outreach activities. Funds will be awarded to grantees serving low-income individuals and families across the state. Funding allocations are based on 15 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 Areas 1-13

Grantees for Target Areas 1 through 13 will serve eligible residents living in counties identified as having the highest proportion of eligible California residents not claiming EITC. Counties were identified by considering the number of potentially eligible Californians with incomes at approximately the Cal EITC income level by county using Census data and the number of Cal EITC filers claiming the credit. Outreach should be concentrated in communities where eligible individuals reside. The target areas are identified below and in further detail in Appendix 1: Maps of Target Areas.

| Target Area | Region |
|-------------|----------------------------------|
| 1 | Los Angeles County |
| 2 | San Diego County |
| 3 | Alameda/Santa Clara Counties |
| 4 | San Francisco/San Mateo Counties |
| 5 | Sacramento County |
| 6 | Riverside County |
| 7 | Orange County |
| 8 | Contra Costa/Sonoma Counties |
| 9 | San Bernardino County |
| 10 | Kern/Tulare Counties |
| 11 | San Joaquin/Stanislaus Counties |
| 12 | Fresno County |
| 13 | Ventura/Santa Barbara Counties |

Target Area 14: Rural Counties

The Target Area 14 grantees will serve rural residents in counties identified as those with a general population of less than 100,000 as defined by the California State Association of Counties. Butte County has been added to Target Area 14 to achieve geographic efficiencies in service delivery. Rural counties are identified in Appendix 1: Maps of Target Areas.

Education and outreach activities should include a variety of grassroots outreach strategies to best reach eligible individuals and families residing in rural areas. For example, because the geographic distribution of eligible individuals in rural areas varies considerably, outreach strategies such as group events or canvassing to businesses may be more appropriate when compared to going door-to-door in housing when developing an effective EITC campaign. The rural grantee may support canvassing efforts, but it is not a requirement. The funded grantee shall make every effort to reach as many rural counties as possible with effective and appropriate outreach methods.

Target Area 15: Statewide

Target Area 15 grantees will serve eligible residents statewide. The statewide grantees will provide coverage to the broadest audience, reaching the largest number of eligible Californians through a variety of outreach strategies. Thus, grantees may focus on activities designed to make an impact on the largest populations including, but not limited to: social media, hosting mega events, airing public service announcements, radio interviews, call center engagement, etc. Statewide grantees may support canvassing efforts, but it is not a requirement. Statewide grantees may also incorporate and oversee mini-grants targeted in specific areas to have the largest impact possible. The statewide grantees must consider economies of scale and coordination of efforts with other target areas.

Statewide grantee activities are also aimed at building sustainable infrastructure to support ongoing efforts for education and outreach on Cal EITC and EITC. Grantees will be expected to provide training and technical assistance and collateral materials to other regional grantees on an as-needed basis. Statewide grantees will coordinate to ensure consistent messaging across target areas. 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. Applicants proposing to conduct statewide education and outreach shall make every effort to reach as many eligible Californians as possible.

| Geography | Funding Allotment |
|---------------------|-------------------|
| Target Areas 1 - 13 | \$3,960,000 |
| Rural Counties | \$220,000 |
| Statewide | \$820,000 |
| Total | \$5,000,000 |

Below is a breakdown of the funding allotments for each target area. Applicant's budget (CSD 171A and CSD171B) must reflect the full contract award.

| Target Area | Region | Allotment by Region | Anticipated # of Grants | Contract Award |
|-------------|--------------------------------|---------------------|-------------------------|----------------|
| 1 | Los Angeles County | \$1,287,000 | 3 | \$429,000 |
| 2 | San Diego County | \$379,000 | 1 | \$379,000 |
| 3 | Alameda/Santa Clara Counties | \$364,000 | 1 | \$364,000 |
| 4 | San Francisco/San Mateo | \$252,000 | 1 | \$252,000 |
| 5 | Sacramento County | \$233,000 | 1 | \$233,000 |
| 6 | Riverside County | \$226,000 | 1 | \$226,000 |
| 7 | Orange County | \$219,000 | 1 | \$219,000 |
| 8 | Contra Costa/Sonoma Counties | \$201,000 | 1 | \$201,000 |
| 9 | San Bernardino County | \$192,000 | 1 | \$192,000 |
| 10 | Kern/Tulare Counties | \$175,000 | 1 | \$175,000 |
| 11 | San Joaquin/Stanislaus | \$165,000 | 1 | \$165,000 |
| 12 | Fresno County | \$153,000 | 1 | \$153,000 |
| 13 | Ventura/Santa Barbara Counties | \$114,000 | 1 | \$114,000 |

| Target Area 11 | Allotment by Area | Anticipated # of Grants | Contract Award |
|----------------|-------------------|-------------------------|----------------|
| Rural Counties | \$220,000 | 2 | \$110,000 |

| Target Area 12 | Allotment by Area | Anticipated # of Grants | Contract Award |
|----------------|-------------------|-------------------------|----------------|
| Statewide | \$820,000 | 2 | \$410,000 |

8. Inappropriate Use of Funds

The following restrictions apply to grants made under this funding:

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 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.

9. Expected Number of Grants

CSD anticipates awarding a total of approximately 19 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.

10. 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 EITC education and outreach to eligible California residents.
- Funds must be used for cost effective education and outreach activities having a measurable outcome that is trackable.
- Grantees must target households with incomes at or below the filing limit.
- Grant funds must support new EITC education and outreach activities or expand upon existing efforts. These funds are not intended to replace or supplant existing EITC education and outreach funds.
- Submission of all Application Packet Documents (refer to Application Package Documents List).
- Grantees must conduct activities and messaging at minimum in both English and Spanish.
- Grantees must comply with monthly programmatic and fiscal reporting.
- Grantees must participate in monthly coordination calls with CSD and awarded grantees.
- Grantees must collaborate with each other and free tax preparation assistance programs to optimize education and outreach efforts for overlapping taxpayers or geographic areas.
- Grantees must collaborate with FTB by providing personally identifying data of individuals that were contacted during outreach efforts as well as information related to how these individuals were contacted so FTB can perform the legislatively mandated review of most effective outreach strategies to reach the targeted populations.
- 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.

11. Contract/Funding Term

The anticipated contract term is October 15, 2018 through June 30, 2019.

12. 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, non-profit, or public organization that qualified for and received an Internal Revenue Service 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.
- Eligible to receive public funds (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.

13. Minimum Qualifications

To support Cal EITC education and outreach activities, applicants must demonstrate:

- Knowledge of the Cal EITC and free tax preparation assistance program;
- Three 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(s); and
- Ability to collect and report reliable, valid, and timely data monthly for all proposed activities.

14. References

Applicants are required to submit two letters of reference with the submission of the application. Letters are required to be recent, dated within a 12-month period. References should be from organizations that are familiar with the applicant's qualifications, experience, and past performance on education and outreach related work.

15. Use of Planned Subcontractors

The use of subcontractor(s) is allowed if the subcontract helps support the outreach goals and the ability to reach the target population. The use of any planned subcontractor(s) must be fully explained in the Subcontractor Information Worksheet (CSD 171SI). CSD will make payments to the 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.

16. Projected Timeline

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

| Activity | Date |
|---|----------------------------------|
| NOFA Released | August 15, 2018 |
| Bidders Conference | August 23, 2018 |
| Deadline for Submitting Questions | August 24, 2018 |
| Notice of Intent to Apply | August 24, 2018 |
| Question & Answers Posted on CSD Public Website | August 28, 2018 |
| Deadline for Submitting Applications | September 5, 2018 |
| Notice of Awardees Posted | September 26, 2018 |
| Contracts Sent to Awardees | October 1, 2018 |
| Contract Due Back to CSD | October 9, 2018 |
| Contract Term | October 15, 2018 – June 30, 2019 |

Applicants receiving an award are asked to return their contracts to CSD as expeditiously as possible to prevent a delay in planned education and outreach activities, considering the projected timeline. Grantees must 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 this grant application, which will be held on August 23, 2018. The webinar registration link will be available at: www.csd.ca.gov.

2. Questions

CSD has compiled a Frequent Asked Questions document to address general inquiries and areas of clarification needed from the 2017 Cal EITC NOFA and grant (Appendix III – Frequently Asked Questions). However, to ensure fairness, applicants may submit additional questions regarding any part of this NOFA, including technical questions and required attachments. Questions must be emailed to CSBGDiv@CSD.CA.GOV using the following subject line: Questions on 2018-NOFA-Cal EITC.

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 on or before 5:00 p.m. on August 24, 2018.

Questions and answers will be posted by CSD on August 28, 2018 at: www.csd.ca.gov. Questions will also be captured at the Bidders Conference.

3. Notice of Intent to Apply

Interested applicants should submit a Notice of Intent to Apply by 5:00 p.m. on August 24, 2018. The Notice of Intent to Apply form is located on the CSD Public website at: www.csd.ca.gov. The completion and submission instructions are detailed on the form.

The Notice of Intent 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 form may be submitted via email at CSBGDiv@csd.ca.gov or by mail to:

Department of Community Services and Development
 Attn: 2018 Cal EITC NOFA
 2389 Gateway Oaks Drive, Suite 100
 Sacramento, CA 95833-4246

4. Application Package Requirements

Applicants must submit all documents listed below. The order indicates how the documents should be collated upon mailing them to CSD. Title is the official title of the form and its form number. File Name refers to the specific Word, Excel, or PDF files each are located in. Please note that the Cal EITC Education and Outreach Grant Application Narrative Template (CSD 171ANT) has a 20-page limit. All other forms do not have page limits. All NOFA documents are located at: www.csd.ca.gov.

| Stack Order | Document Title |
|-------------|--|
| N/A | Application Packet Instructions and Document List *NOTE (do not return with application) |
| 1 | Application Cover Sheet (CSD 171 Cover Sheet) |
| 2 | Application Narrative Template (CSD 171ANT) |
| 3 | Scope of Work (CSD 171) |
| 4 | Budget Forms <ul style="list-style-type: none"> • Budget Summary (CSD 171A) • Budget Detail (CSD 171B) |

| | |
|---|---|
| 5 | Timeline (CSD 171TL) |
| 6 | Two letters of Reference |
| 7 | Subcontractor Information Worksheet (CSD 171SI) |
| 8 | Payee Data Record (STD 204) |
| 9 | 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 package 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) submitted;
- The requested funding within the funding limits;
- All completed application documents from the table above (1-9) included with the application; and
- Full contact information and applicable signatures for 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 paper submissions will be accepted. Applications must be received by 5:00 p.m. on September 5, 2018. The full application package must be sealed, addressed, and shipped to:

Department of Community Services and Development
 Attn: 2018 Cal EITC NOFA
 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 summarizes the available points for the scored documents of the application package. Scores will be assigned per the points identified in the table below and in Appendix II: Scoring Matrix.

| Document Title | Subtitle | Total Possible Points |
|--|--|-----------------------|
| Application Narrative Template (CSD171 ANT) (55 possible) | Education and Outreach | 20 |
| | Organizational Capacity | 25 |
| | Trusted Partners and Leveraging | 10 |
| Preference Points (10 possible) | Past Activities Conducting EITC Education and Outreach | 5 |
| | Languages (other than English and Spanish) | 5 |
| Scope of Work (CSD 171) | | 45 |
| Total Points Possible | | 110 |

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

| Rating | Score | Ranking |
|--|----------|-------------|
| Exceeds all requirements | 101-110 | Exceptional |
| Excellent ability to meet all requirements | 90 – 100 | Outstanding |
| Expected to meet all requirements | 80 – 89 | Good |
| Capable of meeting all requirements | 70 – 79 | Fair |
| May not be able to meet all requirements | 60 – 69 | Poor |
| Not likely to meet all requirements | 50 – 59 | 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 110.

Applicants must receive a final total score of at least 70 points, not 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 15 Target Areas. For example, Target Area 1 (Los Angeles) applicants will be evaluated against other applications applying for funding in Los Angeles 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 171ANT) and Scope of Work (CSD 171) to address the following proposal elements:

3. Application Narrative Template (CSD 171ANT) (55 Points)

A total of 55 points is possible for the Application Narrative Template (CSD 171ANT). The Application Narrative Template includes Experience Conducting Education and Outreach Activities, Organizational Capacity, and Trusted Community Partners and Leveraging Resources sections detailed below.

Experience Conducting Education and Outreach Activities (20 Points)

Present a detailed description of the applicant's:

- a) Experience conducting similar education and outreach activities to low-income individuals and families in the specified Target Area for which the applicant is applying. A minimum of three years of experience is required;
- b) Past education and outreach campaigns conducted in the proposed target area in appropriate languages; and
- c) Operational readiness and expertise in conducting, budgeting, and implementing similar scale education and outreach activities.

Organizational Capacity (25 Points)

Provide a detailed narrative to complement applicant's Scope of Work (CSD 171) that describes:

- a) The geographic area(s) to be targeted, including:
 - county
 - zip code
 - city/neighborhood (if available)
 - rural or urban
 - other identifying targeting information
- b) The service delivery strategy to be used to deliver education and outreach activities. Emphasis should be given to those strategies with the greatest amount of person to person and targeted interventions. Targeted interventions, for example, may include grantees

collaborating with public agencies and CBOs to reach eligible individuals and families receiving public benefits such as CalWORKs, Cal Fresh, or Medi-Cal.

- c) Why the type(s) of outreach chosen is/are determined to be the most effective method for reaching the proposed area/population to be served.
- d) Efforts to ensure proposed education and outreach activities are reaching:
 - Culturally diverse low-income eligible populations in multiple languages
 - Young adults ages 18-24
 - Seniors ages 65 and older
 - Self-employed workers
 - Workers with incomes up to \$22,322
 - Individuals and families whose low income does not require them to file taxes
 - Californians who have never claimed the EITC, regardless of whether filed taxes previously.
- e) Expertise, staffing, partnerships, etc. that will help in the delivery of the proposed activities with a specific emphasis on partnerships that will assist in reaching those that are not required to file taxes, self-employed, individuals 18 to 24 years, and individuals over 65 years.
- f) Activities designed to help connect people with local free tax preparation assistance sites and/or other resources (e.g. <https://www.eitc.irs.gov>), making it convenient, easy, and accessible for people to claim the credit. Free tax preparation assistance activities could include setting appointments, providing referrals, making follow-up calls, etc.
- g) Describe how data will be collected monthly to ensure accurate and timely submission of outcomes and expenditures.

Trusted Community Partners and Leveraging Resources (10 Points)

Applicants are required to engage trusted community partners with their education and outreach efforts. Engaged partners should have established trusted relationships with low-income community members, preferably with EITC and tax preparation assistance experience. Trusted community partners are not subcontractors in that, for this NOFA, they are unfunded collaborative and CBOs that have a positive, past working relationship with applicants.

In the table indicate:

- Name(s) and location(s) of community partner(s) to be engaged
- Purpose of the community partner
- Description of how the partner will help the applicant achieve the projected outcomes identified in the Scope of Work (CSD 171)
- Efforts involving coordinating with public benefits agencies as well as public and private

faith-based school, social services program, veteran, and disability entities.

4. Preference Points (10 Points)

A total of 10 Preference Points is possible. Preference points can be obtained by adequately completing the sections below;

Past Activities Conducting EITC Education and Outreach (5 Points)

Up to five preference points will be provided to organizations with past EITC education and outreach experience, which may include free tax preparation assistance programs. If applicants have experience conducting past EITC-specific education and outreach services, they must provide data to demonstrate past accomplishments spanning one to three years in the table provided on the Application Narrative Template (CSD 171 ANT).

Languages Other Than English and Spanish (5 Points)

Up to five preference points will be provided to organizations that will provide education and outreach activities in languages beyond English and Spanish to meet the needs of the Target Area.

5. Scope of Work (CSD 171) (45 Points)

Activities must have measurable and pragmatic outcomes for which the applicant's organization or entity can reliably collect and validate.

Applicants must include:

- Identifying information on individuals and families proposed for services;
- Estimate of the number of eligible Californians to be served by the education and outreach activities; and
- Description of performance measures.

For the sake of this NOFA, "Outcome" is defined as the result, effect, or consequence that will occur from carrying out the education and outreach activity that is directly related to this NOFA's goals and objectives. Outcomes must be achievable within the contract/funding term. CSD will evaluate the effectiveness of the applicant's plan for tracking and measuring its performance toward reaching the estimated number of eligible Californians.

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; and
- Change any of the scheduled dates in the Projected Timeline with notice.

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.).

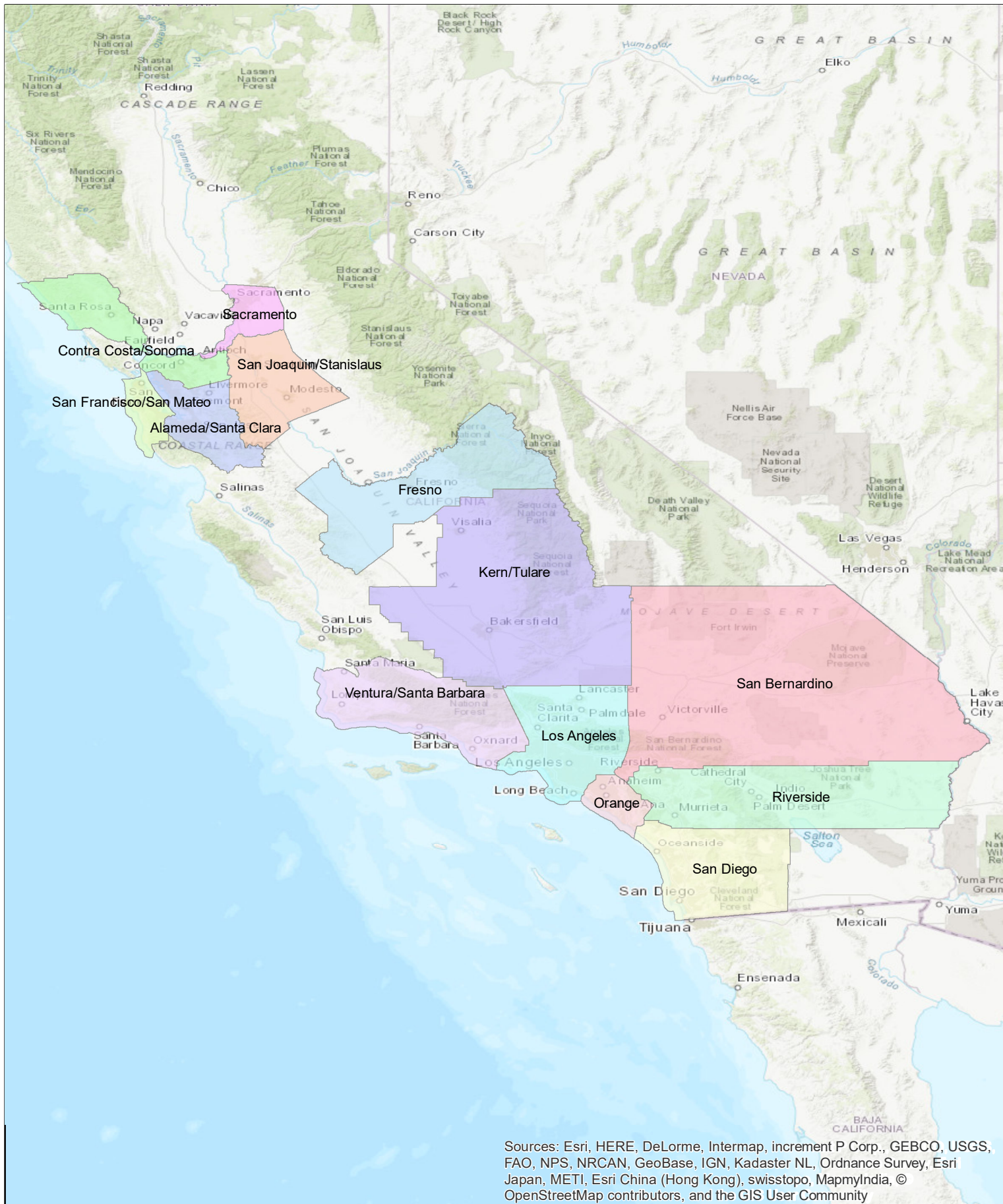
-- END NOFA --

Cal EITC Education and Outreach Grant
Appendix 1
Maps of Target Areas 1-13

Total Potential Cal EITC Filers Calculation Methodology

Potential Cal EITC filers was calculated by using Census data to identify households that approximately meet the income thresholds to claim the Credit. This is then subtracted from the amount of filers that claimed the Cal EITC from the previous year.

Education and Outreach Grant Target Areas



Sources: Esri, HERE, DeLorme, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, MapmyIndia, © OpenStreetMap contributors, and the GIS User Community

Top Cal EITC Total Potential Filers for each Target Area by Zip Code

Target Area 1: Los Angeles County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|-------------|
| 90044 | Los Angeles |
| 90011 | Los Angeles |
| 90037 | Los Angeles |
| 90057 | Los Angeles |
| 90046 | Los Angeles |
| 90006 | Los Angeles |
| 90019 | Los Angeles |
| 90250 | Hawthorne |
| 93550 | Palmdale |
| 90005 | Los Angeles |

Target Area 2: San Diego County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|-------------|
| 92101 | San Diego |
| 92105 | San Diego |
| 91910 | Chula Vista |
| 92115 | San Diego |
| 91911 | Chula Vista |

Target Area 3: Alameda County/Santa Clara County

| Alameda County | |
|-----------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 94606 | Oakland |
| 94607 | Oakland |
| 94601 | Oakland |
| 94704 | Berkeley |
| 94541 | Hayward |

| Santa Clara County | |
|---------------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 95112 | San Jose |
| 95116 | San Jose |
| 95111 | San Jose |
| 95126 | San Jose |
| 95050 | Santa Clara |

Target Area 4: San Francisco County/San Mateo County

| San Francisco County | |
|-----------------------------|---------------|
| <i>Zip Code</i> | <i>City</i> |
| 94109 | San Francisco |
| 94102 | San Francisco |
| 94103 | San Francisco |
| 94110 | San Francisco |
| 94133 | San Francisco |

| San Mateo County | |
|-------------------------|---------------------|
| <i>Zip Code</i> | <i>City</i> |
| 94080 | South San Francisco |
| 94015 | Daly City |
| 94063 | Redwood City |
| 94401 | San Mateo |
| 94010 | Burlingame |

Top Cal EITC Total Potential Filers for each Target Area by Zip Code

Target Area 5: Sacramento County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|-------------|
| 95823 | Sacramento |
| 95825 | Sacramento |
| 95608 | Carmichael |
| 95821 | Sacramento |
| 95828 | Sacramento |

Target Area 6: Riverside County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|----------------|
| 92543 | Hemet |
| 92201 | Indio |
| 92234 | Cathedral City |
| 92507 | Riverside |
| 92399 | Yucaipa |

Target Area 7: Orange County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|--------------|
| 92683 | Westminster |
| 92804 | Anaheim |
| 92627 | Costa Mesa |
| 92637 | Laguna Woods |
| 92701 | Santa Ana |

Target Area 8: Contra Costa County/Sonoma County

| Contra Costa County | |
|----------------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 94565 | Pittsburg |
| 94509 | Antioch |
| 94806 | San Pablo |
| 94804 | Richmond |
| 94520 | Concord |

| Sonoma County | |
|----------------------|--------------|
| <i>Zip Code</i> | <i>City</i> |
| 95404 | Santa Rosa |
| 94928 | Rohnert Park |
| 95403 | Santa Rosa |
| 95472 | Sebastopol |
| 95401 | Santa Rosa |

Target Area 9: San Bernardino County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|----------------|
| 92345 | Hesperia |
| 92335 | Fontana |
| 92410 | San Bernardino |
| 92404 | San Bernardino |
| 92376 | Rialto |

Top Cal EITC Total Potential Filers for each Target Area by Zip Code

Target Area 10: Kern County/Tulare County

| Kern County | |
|--------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 93307 | Bakersfield |
| 93309 | Bakersfield |
| 93308 | Bakersfield |
| 93304 | Bakersfield |
| 93306 | Bakersfield |

| Tulare County | |
|----------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 93257 | Porterville |
| 93291 | Visalia |
| 93277 | Visalia |
| 93292 | Visalia |
| 93247 | Lindsay |

Target Area 11: San Joaquin County/Stanislaus County

| San Joaquin County | |
|---------------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 95207 | Stockton |
| 95206 | Stockton |
| 95240 | Lodi |
| 95210 | Stockton |
| 95205 | Stockton |

| Stanislaus County | |
|--------------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 95350 | Modesto |
| 95351 | Modesto |
| 95355 | Modesto |
| 95307 | Ceres |
| 95382 | Turlock |

Target Area 12: Fresno County

| <i>Zip Code</i> | <i>City</i> |
|-----------------|-------------|
| 93727 | Fresno |
| 93702 | Fresno |
| 93726 | Fresno |
| 93703 | Fresno |
| 93722 | Fresno |

Target Area 13: Ventura County/Santa Barbara County

| Ventura County | |
|-----------------------|-------------|
| <i>Zip Code</i> | <i>City</i> |
| 93003 | Ventura |
| 93001 | Ventura |
| 93030 | Oxnard |
| 93060 | Santa Paula |
| 93033 | Oxnard |

| Santa Barbara County | |
|-----------------------------|---------------|
| <i>Zip Code</i> | <i>City</i> |
| 93117 | Goleta |
| 93436 | Lompoc |
| 93101 | Santa Barbara |
| 93455 | Santa Maria |
| 93105 | Santa Barbara |