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October 4, 2021

**Notice of Funding Availability  
2021 California Earned Income Tax Credit Plus (CalEITC+)  
Education and Outreach Grant**

**Important Dates**

Notice of Funding Availability Release Date – October 4, 2021  
Deadline to Submit Questions – October 15, 2021  
Bidder's Conference – October 21, 2021  
Notice of Intent to Apply Due Date – October 22, 2021  
Questions & Answers Posted on CSD Public Website – October 22, 2021  
**Deadline to Submit Applications – November 1, 2021 by 5:00 p.m.**  
Notice of Awardees Posted – November 22, 2021  
Contract Term – December 1, 2021 – June 30, 2022

*Serving Low-Income Families Through Community Partners*

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## Part A: CalEITC+ Education and Outreach Grant Overview

### 1. Department Overview

The mission of the California Department of Community Services and Development (CSD) is to reduce poverty for Californians by leading the development and coordination of effective and innovative programs for low-income individuals, families, and their communities.

Under the umbrella of the California Health and Human Services Agency, CSD administers community services and energy programs through a network of local providers and regional administrators to deliver services to low-income families, individuals, and communities. The services and programs administered by CSD help low-income Californians achieve and maintain economic security, meet their financial home energy needs, and reduce their utility costs through energy efficiency upgrades and access to clean, renewable energy.

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-income working individuals and families when they prepare and file their tax returns. For eligible filers, EITC delivers a much-needed income boost to help meet basic needs and strengthen their economic security. Yet, every year eligible Californians fail to claim EITC and other credits delivered through the tax system. The forgone economic benefits result in lost opportunities to improve the economic security of low- to moderate-income Californians, business sales, job growth, wages, labor income, and tax revenue for state, county, and city governments.

In 2015, California established the California EITC (CalEITC), extending a state cashback credit to the poorest working families in the state. Since then, the state has steadily expanded eligibility for CalEITC. In 2019, California introduced the Young Child Tax Credit (YCTC) to provide up to an additional \$1,000 to qualifying families with children under the age of six. In 2021, California enacted the Golden State Stimulus (GSS) I and II to support eligible low and middle-income families and individuals facing hardship due to the COVID-19 pandemic, including noncitizen Californians who file their taxes with an Individual Taxpayer Identification Number (ITIN). When combined, the expanded CalEITC, YCTC, and GSS I and II can put hundreds or even thousands of extra dollars in the pockets of eligible Californians. Helping Californians access additional federal financial assistance

provided by the federal EITC and federal Child Tax Credit only adds to the importance of encouraging and assisting residents to file their taxes.

To maximize participation and claiming of the available tax credits by eligible Californians, the Budget Act of 2021 appropriated \$15 million to the Franchise Tax Board (FTB) to increase awareness of CalEITC, YCTC, and GSS I and II<sup>1</sup> as well as ITIN tax status eligibility. These “CalEITC+” funds may also be used to increase awareness of and access to free tax preparation assistance services. CSD has partnered with FTB to make CalEITC+ grant funds available under this Notice of Funding Availability (NOFA) to conduct education and outreach, free tax preparation assistance, and ITIN application acceptance assistance activities to increase the number of eligible Californians who file for the 2021 tax filing season.

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

The purpose of this NOFA is to inform interested parties of the availability of funding to increase awareness of available tax credits and ITIN tax status eligibility, to make available ITIN application acceptance assistance to eligible noncitizen Californians, and to provide free tax preparation assistance services to low- to moderate-income individuals and families. Education and outreach efforts under the CalEITC+ grant program must also include information on the federal EITC and Child Tax Credit. CSD seeks to engage established organizations that maintain an existing community presence and trusted relationships, demonstrate extensive experience conducting similar outreach campaigns, and regularly interact with 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.

Applicants should conduct cost-effective education and outreach activities that will inform community members about the availability of the CalEITC, the YCTC, the federal EITC, and Child Tax Credit, and the importance of filing their taxes, including to noncitizen Californians who file using an ITIN or those who may be eligible to acquire an ITIN. Activities must connect low-income residents with local free tax preparation sites or online resources that help people file their taxes at no cost to claim the federal and California state credits, such as free online tax preparation (e.g., FTB’s CalFile).

Grantees will be required to provide free tax preparation assistance to eligible Californians through their own services or partner organizations. Grantees will work closely with local

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<sup>1</sup> Note: While increasing awareness of the Golden State Stimulus was included in the Budget Act of 2021 as a grant activity, eligibility for the Golden State Stimulus I and II requires a tax filing by October 15, 2021. As a result, Golden State Stimulus I and II will not be included in the scope of education and outreach activities because the eligibility period will expire prior to CalEITC+ program launch.

free tax preparation assistance sites, either with their own or partner 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 assistance service. Grantees will also be required to increase awareness of the availability of the ITIN for eligible noncitizens of California, and provide ITIN application assistance through their own services, partner organizations, or referrals to statewide grantees for ITIN application acceptance assistance.

Funding allocated under this grant program will support new or expansion activities and may not replace or supplant existing funding sources.

#### 4. Goals and Objectives

##### Goals:

- To increase the number of eligible Californians claiming the available tax credit(s) by providing information to raise awareness of CalEITC, YCTC, federal EITC, and federal Child Tax Credit;
- To provide access to free tax preparation assistance services for eligible low-income California individuals and families; and,
- To provide ITIN eligibility outreach and access to ITIN application acceptance assistance.

##### Objectives:

- Conduct CalEITC+ education and outreach activities to eligible California residents that promote and maximize awareness of CalEITC, YCTC, the federal EITC, and federal Child Tax Credit, including the purpose, benefits, eligibility criteria, where to go, how to claim the available credit(s) at no cost via free tax preparation assistance programs, and how to claim past years' credit(s).
- Partner with trusted organizations in the community to implement effective CalEITC+ education and outreach activities.
- Encourage eligible low-income individuals and families to file a state and federal tax return and receive the tax credits, which includes providing information on local, free tax filing services.
- Target eligible populations, including noncitizens who may file using an ITIN.
- Disseminate clear, accurate, and consistent information to target audiences, including culturally diverse, hard-to-reach populations, to increase awareness of the available tax credit(s), access to ITIN application assistance services, and access to free tax preparation assistance services in English, Spanish, and other languages, as applicable.
- Collect, track, and report outcomes on education and outreach efforts by providing

quality data to support identification of the most effective outreach strategies to reach the targeted populations.

- Increase access to free tax preparation assistance services for eligible Californians by expanding and maintaining the capacity and infrastructure of existing and new free tax preparation assistance administrators through:
  - Establishing new site offerings;
  - Extended hours of operation; and
  - Increased staffing, improved outreach, and increased volunteer recruitment and retention campaigns.
- Assist interested populations with processing their IRS Form W-7 application for Individual Taxpayer Identification Number either through direct service, via a subcontracted or partner Internal Revenue Service (IRS) certified Acceptance Agent, or a referral to statewide CalEITC+ grantees.

## 5. Education and Outreach Targeting

CalEITC+ education and outreach shall be targeted to eligible Californians per the following requirements:

### i) Income Eligibility:

CalEITC+ education and outreach activities must target individuals and families with incomes at or below the filing requirement based on the income limits established for the 2021 tax year. The maximum eligible earned income for CalEITC during the 2021 tax year is \$30,000, regardless of family size. Applicants must detail their plans to reach eligible Californians in the Workplan (CSD 171) and Application Narrative Template (CSD 171ANT).

### ii) Messaging:

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. At minimum, CalEITC+ 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 are expected to report on outcomes resulting from any collaboration with local free tax preparation assistance programs. Grantees should also include information about the federal EITC and Child Tax Credit 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 FTB’s website at <https://www.ftb.ca.gov/about-ftb/newsroom/caleitc/outreach-materials.html>.

Critical outreach and eligibility information is available through the following participating agencies and websites, and should also be referenced as a resource:

Franchise Tax Board:

- [https://www.ftb.ca.gov/about-ftb/newsroom/caleitc/index.html?WT.mc\\_id=akEITC](https://www.ftb.ca.gov/about-ftb/newsroom/caleitc/index.html?WT.mc_id=akEITC)
- <https://www.ftb.ca.gov/file/personal/credits/california-earned-income-tax-credit.html>
- <https://www.ftb.ca.gov/about-ftb/newsroom/golden-state-stimulus/help.html>

Internal Revenue Service:

- <https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit-eitc>
- <https://www.irs.gov/individuals/how-do-i-apply-for-an-itin>

Messaging should encompass, at a minimum, the required elements illustrated in the table below and directed to identified relevant target populations.

Required Elements
Availability of the CalEITC
Availability of the YCTC
Availability of the federal EITC and Child Tax Credit
ITIN application acceptance assistance services
Free tax preparation assistance
Where to get more information

Target Populations
Californians eligible for CalEITC, YCTC, federal EITC, and federal Child Tax Credit
Eligible Californians who have never claimed the CalEITC
Californians who are not required to file taxes due to low income



Noncitizens who have a current ITIN
Noncitizens who may be eligible to apply for an ITIN

iii) Geographic Area:

CalEITC+ education and outreach activities shall be provided to counties identified as having the highest proportion of eligible California residents earning less than \$30,000. Target Areas are identified in Section 7 (Available Funding) and Appendix 1: Map 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 “CalEITC Particularly Benefits Children of Color and Women.”<sup>2</sup> Education and outreach activities should endeavor to target the following populations identified and listed in the table below:

<b>Characteristics of Those Failing to Claim</b>
Areas of high concentration of Latinos
Individuals with lower incomes than required to file a tax return
Parents (particularly mothers) of Children of Color
Individuals participating in CalFresh/Supplemental Nutrition Assistance Program (SNAP)
Individuals without qualifying children
Populations with Limited English Proficiency
Culturally diverse populations and communities
Qualifying workers who hold an Individual Taxpayer Identification Number (ITIN)

<sup>2</sup> For Update on the “Left on the Table Report,” go here: <https://www.csd.ca.gov/Pages/CalEITC.aspx>. For “CalEITC Particularly Benefits Children of Color and Women” report, go here: <http://calbudgetcenter.org/blog/caleitc-particularly-benefits-children-color-women/>.

## 6. Free Tax Preparation Assistance 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.

## 7. CalEITC+ Activities

Activities conducted under this funding opportunity must align with the following definitions:

[CalEITC](#): a tax credit that provides a tax refund that can put hundreds or even thousands of dollars back into the pocket of eligible low-income California workers. Information provided to eligible populations about the CalEITC 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 prior years' credit(s).

[CalEITC+ Education and Outreach Grant Program](#): Education and outreach efforts regarding CalEITC, YCTC, the federal EITC and Child Tax Credit, ITIN tax status eligibility, assistance with free tax preparation, and ITIN acquisition. Details on each element are listed below.

[Education and Outreach](#): Activities (e.g., strategic grassroots campaigns) intended to increase the number of eligible California residents claiming the available credit(s).

[Federal Child Tax Credit](#): Information provided to eligible families that the IRS is providing families with one-half of the federal 2021 Child Tax Credit of \$3,600 per child under the age of six and \$3,000 for each child between the ages of six and 17 in six monthly payments of \$300 and \$250 per child, respectively.

[Federal EITC](#): Information provided to eligible populations about the federal EITC 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 prior years' credit(s).

*Free Tax Preparation Assistance:* Support new, or the expansion of an organization's existing free tax preparation assistance activities among qualified, low- to moderate-income Californians to reach eligible populations that would benefit from no-cost tax preparation assistance and filing.

*ITIN Application Acceptance Assistance:* Assist interested noncitizen Californians with the IRS Form W-7 Application for Individual Taxpayer Identification Number at no cost; inform individuals that Form W-7 requires specific documentation substantiating foreign status and true identity for each individual applying.

*ITIN Eligibility Awareness:* Information provided to eligible noncitizen Californians, their spouses, and dependents; ITIN eligibility awareness is intended for all noncitizen residents who do not have a Social Security Number but may be eligible to acquire an ITIN and receive state tax credit(s) (CaEITC and YCTC) when they file their state tax return. Information provided to eligible noncitizen Californians on where they can obtain assistance on completing the ITIN application process.

*Young Child Tax Credit:* Information provided to eligible families who qualify for CaEITC and have a child under the age of six as of the end of the 2021 tax year, may qualify for up to \$1,000 through this credit.

## 8. Education and Outreach Activities

Education and outreach activities are listed below. Other types of innovative outreach not explicitly listed are allowed, per CSD approval, and encouraged if an applicant can clearly establish the effectiveness of the proposed outreach. Outreach activities listed with an “R” next to them indicate activities required of all grantees, while activities listed with an “O” are encouraged but optional.

Required or Optional	Outreach Type	Activity
R	Web	<ul style="list-style-type: none"> <li>• Create or maintain a website or webpage(s) specifically designed to promote and maximize awareness of the CalEITC, YCTC, federal EITC and Child Tax Credit and ITIN eligibility.</li> <li>• Host educational information and updates about the credits and free tax preparation assistance on website.</li> <li>• Provide links to CalEITC educational materials, tools, calculators, maps, etc.</li> </ul>
R	Social Media	<p>Disseminate educational messages, share success stories, and inform the public about outreach events in targeted counties and local communities via social media channels that may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• Facebook</li> <li>• Instagram</li> <li>• Twitter</li> <li>• YouTube</li> <li>• TikTok</li> </ul>
R	Canvassing	<p>Make contact in targeted residential neighborhoods and community gathering places to engage individuals and families in one-on-one interactions. Canvassing can include traditional door-to-door activities, text messaging campaigns, phone banking, and other direct, targeted, person-to-person efforts to reach potentially eligible Californians.</p>
O	Media	<p>Educate through earned and unearned media activities through the following channels, including:</p> <ul style="list-style-type: none"> <li>• Print</li> <li>• Radio</li> <li>• TV</li> <li>• Internet/Website Advertising</li> <li>• Social Media Promoted/Boosted Advertising</li> </ul>

Required or Optional	Outreach Type	Activity
R	Collateral Messaging	Distribute messaging in multiple languages that are culturally appropriate for target audiences and demographics through the following mediums: <ul style="list-style-type: none"> <li>• Flyers/Brochures</li> <li>• Direct mailers</li> <li>• Newsletters</li> </ul>
O	Group Events	Host or participate in coordinated outreach events (virtual or in-person) to engage groups of eligible people (more than one individual/family) at locations that may include: <ul style="list-style-type: none"> <li>• Community gatherings</li> <li>• Resource fairs</li> <li>• Mega-events</li> <li>• Local businesses</li> <li>• Educational forums</li> <li>• Local free tax preparation assistance and filing service locations such as Volunteer Income Tax Assistance (VITA) sites</li> <li>• Grocery stores/Libraries</li> <li>• Food banks</li> <li>• Churches</li> <li>• Healthcare clinics including vaccination clinics</li> <li>• Schools</li> <li>• Public Meetings (City County, School Boards, etc.)</li> </ul>
O	Other	Other effective outreach strategies

At a minimum, CalEITC+ 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.

9. Target Areas

Regional target areas were identified based on a percentage of households earning less than \$30,000 annually. Statewide and Rural target areas were added to ensure coverage of all areas where eligible Californians live, regardless of the county in which they reside.

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

*Target Area 1: Statewide CalEITC+ (Two Awards)*

Statewide CalEITC+ 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. Statewide grantee activities are not required to reach every county throughout the state but should focus on activities designed to impact the largest number of eligible Californians possible. Education and outreach activities may include, but are not limited to, using social media, hosting mega-events, airing public service announcements, conducting radio interviews, facilitating call center engagement, canvassing, and other education and outreach strategies.

Statewide CalEITC+ grantee activities should build sustainable infrastructure to support ongoing efforts for CalEITC+ education and outreach on the CalEITC, YCTC, the federal

EITC, and federal Child Tax Credit, and to reach eligible populations that would benefit from free tax preparation assistance. Grantees are expected to provide technical assistance and collateral materials to regional grantees on an as-needed basis. Statewide grantees will coordinate with regional grantees to ensure consistent messaging across target areas and to avoid duplication of services. Statewide grantees may incorporate and oversee subgrants. Statewide grantees must consider economies of scale, and coordination of efforts with other target areas. Outreach must connect filers with local free tax preparation assistance sites or online resources that help people file their taxes at no cost.

Grant funds shall be used to support new free tax preparation activities, or the expansion of an organization's existing free tax preparation assistance activities, either through a grantee's direct services or partner organizations. Activities should support the expansion of existing or new efforts to connect eligible tax filers with local free tax preparation assistance sites or online resources. Activities should focus on efforts to organize, place, and certify volunteers to prepare taxes according to IRS standards. Grantees should consider incorporating subgrants into their strategies to make the most significant impact possible and meet the unique needs of local communities.

Statewide CalEITC+ grantees are required to assist interested individuals with completing and submitting the IRS Form W-7 *Application for Individual Taxpayer Identification Number*. ITIN eligibility awareness and application acceptance assistance are intended for all noncitizen California residents who do not have a Social Security Number but may be eligible to receive an ITIN to comply with federal tax law and may be eligible to receive the tax credits (CalEITC and YCTC) when they file their state tax return. Statewide grantees will be expected to accept referrals for ITIN application assistance from regional grantees that lack the capacity to provide application assistance. ITIN application acceptance assistance may be achieved in two ways:

- **Direct service:** Assist interested individuals with completing the IRS Form W-7 *Application for Individual Taxpayer Identification Number* at no cost; inform individuals that Form W-7 requires specific documentation substantiating foreign status and true identity for each individual applying; may allow training for agency staff to become certified IRS Acceptance Agents. A certified Acceptance Agent is required to assist an eligible individual with completing the IRS Form W-7.
- **Subcontract:** Assist interested individuals with processing their IRS Form W-7 application at no cost through a subcontracted or partnered certified IRS Acceptance Agent. Acceptance Agents are entities (e.g., colleges, financial institutions, accounting firms, etc.) authorized by the IRS to assist applicants in obtaining ITINs.

Statewide CalEITC+ grantees are required to dedicate 10 to 30 percent of their activities toward ITIN related activities, a minimum of 35 percent of their activities toward education and outreach, and a minimum of 35 percent of their activities toward free tax preparation assistance. Based on meeting these requirements, grantees have the flexibility to allocate 20 percent of funded activities towards any mix of service categories based on their assessment of statewide needs.

*Target Area 1: Statewide CalEITC+ Free Tax Preparation Assistance (One Award)*

The Statewide CalEITC+ Free Tax Preparation Assistance (FTPA) grantee will serve eligible residents throughout California. Grant funds shall be used to support new free tax preparation activities, or the expansion of an organization's existing free tax preparation assistance activities, either through a grantee's direct services or partner organizations. Activities should support the expansion of existing or new efforts to connect eligible tax filers with local free tax preparation assistance sites or online resources.

Activities for free tax preparation assistance services should focus on efforts to organize, place, and certify volunteers to prepare taxes according to IRS standards. Applicants proposing to conduct statewide CalEITC+ FTPA activities shall make every effort to reach as many eligible Californians as possible. The Statewide CalEITC+ FTPA grantee should strongly consider incorporating subgrants into their strategies to make the most significant impact possible and meet the unique needs of local communities.

The Statewide CalEITC+ FTPA grantee is also required to assist interested noncitizen California residents with completing and submitting the IRS Form *W-7 Application for Individual Taxpayer Identification Number* at no cost. As with the Statewide CalEITC+ grantees, the Statewide CalEITC+ FTPA grantee may achieve ITIN application acceptance assistance by offering direct services through agency staff trained as IRS certified Acceptance Agents and/or through the use of partners or subcontracts.

Statewide CalEITC+ FTPA grantees are required to dedicate 10 to 30 percent of their activities toward ITIN assistance, up to 90 percent for free tax preparation assistance, and a maximum of 10 percent for free tax preparation education and outreach.

*Target Area 2: Los Angeles CalEITC+ Free Tax Preparation Assistance (One Award)*

The Los Angeles CalEITC+ FTPA grantee will serve eligible Californians residing in Los Angeles County. The purpose of the Los Angeles CalEITC+ FTPA grant is to support free tax preparation assistance services for eligible, low- to moderate-income filers that would benefit from no-cost tax preparation assistance and filing. Grant funds shall be used to support new free tax preparation activities, or the expansion of an organization's existing



free tax preparation assistance activities, either through a grantee's direct services or partner organizations. Activities should support the expansion of existing or new efforts to connect eligible tax filers with local free tax preparation assistance sites or online resources. Los Angeles grantee activities for free tax preparation assistance services should also be aimed at building sustainable infrastructure to support ongoing efforts for no-cost tax preparation assistance activities and to provide training, organize, place, and certify volunteers to prepare taxes according to IRS standards.

The Target Area 2 Los Angeles CalEITC+ FTPA grantee is required to dedicate 10 to 30 percent of their activities toward ITIN related activities, up to 90 percent for free tax preparation assistance, and a maximum of 10 percent for free tax preparation education and outreach. Providing no-cost ITIN application acceptance assistance is optional for the Los Angeles CalEITC+ FTPA grantee based on capacity and locally determined needs, but the Los Angeles CalEITC+ FTPA grantee is required to outreach to this eligible population, promote the availability of ITIN, and refer applicants to the statewide grantees or partners for no-cost ITIN application assistance.

#### [Target Areas 2 through 14 CalEITC+: Regional Awards](#)

CalEITC+ grantees for Target Areas 2 through 14 will serve California residents living in counties identified based on the percentage of household populations with incomes at or below the CalEITC income eligibility level of \$30,000 annually. Grant funds shall be used to provide CalEITC+ education and outreach, free tax preparation assistance, and ITIN eligibility awareness.

Providing no-cost ITIN application acceptance assistance is optional for regional grantees based on grantee capacity and locally determined needs, but regional grantees will be required to outreach to this eligible population, promote the availability of ITIN, and refer applicants to the statewide grantees or other partners for no-cost ITIN application acceptance assistance services.

Regional grantees are required to dedicate 10 to 30 percent of their activities towards ITIN related activities, a minimum of 35 percent of their activities toward education and outreach, and a minimum of 35 percent of their activities toward free tax preparation assistance. Based on meeting these requirements, grantees will have the flexibility to allocate 20 percent of funded activities towards any mix of these service categories based on their assessment of community needs.

### [Target Area 15 CalEITC+: Rural Counties \(Two Awards\)](#)

Rural 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 the rural counties target area to achieve geographic efficiencies in service delivery. Rural counties are identified in [Appendix 1: Map of Target Areas](#).

CalEITC+ 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 Californians 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 communities when developing an effective CalEITC+ campaign. The rural grantee may support canvassing efforts, but this is not required. The funded grantee shall make every effort to reach as many rural counties as possible with effective and appropriate outreach methods.

Grant funds shall be used to support new free tax preparation activities, or the expansion of an organization's existing free tax preparation assistance activities, either through a grantee's direct services or partner organizations. Activities should support the expansion of existing or new efforts to connect eligible tax filers with local free tax preparation assistance sites or online resources and certify volunteers to prepare taxes according to IRS standards. Activities should focus on efforts to organize, place, and certify volunteers to prepare taxes according to IRS standards. Grantee should consider incorporating subgrants into their strategies to make the most significant impact possible and meet the unique needs of rural communities.

Rural grantees are required to dedicate 10 to 30 percent of their activities towards ITIN related activities, a minimum of 35 percent of their activities toward education and outreach, and a minimum of 35 percent of their activities toward free tax preparation assistance. Grantees will have the flexibility to allocate 20 percent of funded activities toward any mix of these service categories based on their assessment of community needs. Providing no-cost ITIN application acceptance assistance is optional for rural grantees based on capacity and locally determined needs, but rural grantees are required to outreach to this eligible population, promote the availability of ITIN, and refer applicants to the statewide grantees for no-cost ITIN application acceptance assistance.

## 10. Available Funding

A total of \$15 million is available to specifically support CalEITC+ education and outreach activities, free tax preparation assistance, and ITIN eligibility awareness and application acceptance assistance. Funds will be awarded to grantees serving low-income individuals and families in communities across the state. An applicant may apply for more than one target area. Applicants must submit a separate application for each target area to be considered for funding and are expected to report separate outcomes for each target area awarded. Each application is considered a single, standalone application and should be customized to meet the needs of the target area. Funding allocations are based on 15 target areas, which are described below.

## 11. Funding Allocations

Funding allocations, anticipated number of grants, and funding limits are provided in the table below. Funding will be distributed to awarded applicants on a reimbursement schedule, upon receipt of submitted and approved expenditures and monthly program reports. An applicant may only apply for the full amount found under the “contract award” column. The applicant’s proposed budget (CSD 171A and CSD171B) must reflect the full contract award.

Target Area	Region	CalEITC+ Allotment by Region	Proposed # of CalEITC+ Grants	CalEITC+ Contract Award
1	Statewide	\$1,640,000	2	\$820,000
1	Statewide FTPA	\$820,000	1	\$820,000
2	Los Angeles County	\$2,984,898	3	\$994,966
2	Los Angeles County FTPA	\$994,969	1	\$994,969
3	San Diego County	\$1,057,619	1	\$1,057,619
4	Alameda/Santa Clara Counties	\$884,924	1	\$884,924
5	Sacramento County	\$625,058	1	\$625,058
6	Riverside County	\$841,344	1	\$841,344
7	Orange County	\$844,770	1	\$844,770
8	Contra Costa/Sonoma Counties	\$448,608	1	\$448,608
9	San Bernardino County	\$761,629	1	\$761,629

10	Kern/Tulare Counties	\$628,542	1	\$628,542
11	Fresno County	\$470,750	1	\$470,750
12	San Joaquin/Stanislaus Counties	\$486,294	1	\$486,294
13	San Francisco/San Mateo Counties	\$502,531	1	\$502,531
14	Ventura/ Santa Barbara Counties	\$348,065	1	\$348,065
15	Rural Counties	\$660,000	2	\$330,000

12. Expected Number of Grants

CSD anticipates awarding approximately 21 grants from this NOFA, subject to the availability of funds and the quality of applications received. CSD reserves the right to grant fewer or additional awards under this announcement.

13. Grant Requirements: All Awards

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

- Funds must be spent in a manner that serves the intended purpose of providing CalEITC+ activities to eligible California residents.
- Funds must be used for cost-effective activities that have a measurable outcome that is trackable.
- For education and outreach activities, grantees must target households with incomes at or below the income eligibility limit of \$30,000.
- Grant funds must support new CalEITC+ activities or expand upon existing efforts. These funds are not intended to replace or supplant existing CalEITC education and outreach or free tax preparation assistance funds.
- Grantees must submit all application packet documents by the due date (refer to Application Package Documents List).
- Grantees must conduct activities and messaging at a minimum in both English and Spanish.
- Grantees must comply with monthly programmatic and fiscal reporting.
- Grantees must comply with a fiscal monitoring review.
- Grantees must participate in coordination calls with CSD and awarded grantees.
- Grantees must collaborate with each other and CalEITC+ free tax preparation assistance programs to optimize activities for overlapping taxpayers or geographic areas.
- Grantees must collaborate with CSD and 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 to facilitate the evaluation of effective outreach strategies to reach the targeted populations upon request.

- 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 provide ITIN application assistance service free of charge.
- Grantees must file all eligible returns electronically. For returns prepared for taxpayers requesting an ITIN that has not yet been received, filing a paper return is acceptable.
- 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 (if available), or leveraged through other partnerships before using grant funds for this purpose.
- Training offered through the IRS or FTB should be accessed to train volunteers when feasible.

#### 14. Contract/Funding Term

The anticipated contract term for each awarded contract shall be from December 1, 2021 through June 30, 2022. At CSD's sole discretion, each contract may be amended annually to extend the contract term for additional time, for up to a total of three additional years through June 30, 2025, subject to funding availability and program requirements. There is no obligation for CSD to exercise its right to extend the contract.

#### 15. 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 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 (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 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 successful services and the processes by which funds are requested and distributed.

## 16. Minimum Qualifications

To support CalEITC+ education and outreach activities, applicants must demonstrate:

- Knowledge of the CalEITC, the YCTC, the federal EITC, and Child Tax Credit, and free tax preparation assistance activities;
- Knowledge of the IRS *W-7 Application for IRS Individual Taxpayer Identification Number* application process for noncitizen taxpayers interested in acquiring an ITIN;
- At least three years of experience successfully providing, coordinating, and/or implementing education and outreach and/or free tax preparation assistance activities;
- Established and trusted relationships with community partners serving low-income populations, preferably with partners who have extensive EITC and free tax preparation assistance experience;
- Capacity to implement and deliver all elements of the proposed activities as described in the narrative response to this application;
- Ability to provide education and outreach and free tax preparation assistance activities appropriate to the language and culture of the targeted population(s); and
- Ability to collect and report reliable, valid, and timely data for all proposed activities.

## 17. References

Applicants are required to submit two letters of reference with the submission of each application. Letters are required to be 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. Applicants who have been previously awarded a grant from CSD do not need to submit reference letters.

## 18. Use of Planned Subcontractors

The use of subcontractor(s) is allowed if the subcontract supports the outreach goals and the ability to reach the target population. The use of any planned subcontractor(s) must be fully disclosed in the Subcontractor Information Worksheet (CSD 171SI). CSD will make payments to the awarded organizations directly on a reimbursement schedule. Reimbursement will be for actual cost. CSD will pay grant awardees using the state's reimbursement/payment system per the information provided in the Payee Data Record (STD 204). Grant awardees shall be responsible for paying subcontractors. Selected applicants and their subcontractors are subject to all state laws and regulations.

## 19. Projected Timeline

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

Activity	Date
NOFA Released	October 4, 2021
Deadline for Submitting Questions	October 15, 2021
Bidder's Conference	October 21, 2021
Notice of Intent to Apply Due to CSD	October 22, 2021
Question & Answers Posted on CSD Public Website	October 22, 2021
<b>NOFA Application Deadline</b>	<b>November 1, 2021</b>
Notice of Awardees Posted	November 22, 2021
Contract Term	December 1, 2021 – June 30, 2022

Applicants receiving an award are asked to return their signed contracts to CSD as expeditiously as possible to prevent a delay in planned grant 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 and Submission

### 1. Bidder's Conference

Potential applicants are strongly encouraged to participate in a Bidder's Conference regarding this grant application, which will be held virtually on **October 21, 2021**. The webinar registration link will be available at:

<https://www.csd.ca.gov/Pages/contractopportunities.aspx>

### 2. Questions

To ensure fairness, applicants may submit additional questions regarding any part of this NOFA, including technical questions and required attachments to [CSBG.Div@csd.ca.gov](mailto:CSBG.Div@csd.ca.gov) using the following subject line: Questions on 2021-NOFA-CalEITC+.

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 October 15, 2021.**

Questions and answers will be posted by CSD on **October 22, 2021** on the CSD Public website under "Contracting Opportunities" at:

<https://www.csd.ca.gov/Pages/contractopportunities.aspx>.

### 3. Notice of Intent to Apply

**Interested applicants are encouraged to submit a Notice of Intent to Apply by 5:00 p.m. on October 22, 2021.** The Notice of Intent to Apply form is located on the CSD Public website at: <https://www.csd.ca.gov/Pages/contractopportunities.aspx>. The completion and submission instructions are detailed on the form.

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 they will be applying for the grant. The Notice of Intent to Apply form may be submitted via email to:

[CSBG.Div@csd.ca.gov](mailto:CSBG.Div@csd.ca.gov).



#### 4. Application Package Requirements

Applicants must submit all documents listed below. Please note that the CalEITC+ 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: <https://www.csd.ca.gov/Pages/contractopportunities.aspx>.

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	Workplan (CSD 171)
4	Budget Forms <ul style="list-style-type: none"><li>• Budget Summary (CSD 171A)</li><li>• Budget Detail (CSD 171B)</li></ul>
5	Timeline (CSD 171TL)
6	Subcontractor Information Worksheet (CSD 171SI)
7	Two Letters of Reference (previous CSD awardees exempt)
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 electronic application package in PDF format;
- 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 received after 5:00 p.m. on the due date will be rejected and will not be considered for funding.**

6. Application Submission Instructions

**Applications must be submitted electronically via email to: [CSBG.Div@csd.ca.gov](mailto:CSBG.Div@csd.ca.gov) and received by 5:00 p.m. on November 1, 2021.**

## 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.

Document Title	Subtitle	CalEITC+ Total Possible Points	Statewide and LA CalEITC+ FTPA Total Possible Points
CalEITC+ Application Narrative Template (CSD171 ANT)	Education and Outreach Activities	15	0
	Organizational Capacity	10	10
	Trusted Partners and Leveraging	5	5
	Free Tax Preparation Assistance	15	25
	ITIN Application Acceptance Assistance	5	10
Application Narrative Template Total Points		50	50
CalEITC+ Workplan (CSD 171) Total Points		50	50
Maximum Points Possible		<b>100</b>	<b>100</b>

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

Rating	Score	Ranking
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 listed in the table above (Part C: Evaluation Process) 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. **The maximum number of possible points is 100.**

Applicants must receive a final total score of at least 70 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 the desired qualifications as listed in Section C(3). Applicants will then be ranked based on total score achieved by target area. For example, Target Area 3 (San Diego County) applicants will be ranked against only Target Area 3 (San Diego County) applicants. The scores from each subsection will be combined to determine the applicant’s total score.

## 3. Application Narrative Template

A total of 50 points is possible for the Application Narrative Template (CSD 171ANT) for Target Areas 1 through 15 CalEITC+ Education & Outreach applications, and a total of 50 points is possible for the Application Narrative Template for Target Area 1 – Statewide and Target Area – 2 Los Angeles County CalEITC+ Free Tax Preparation Assistance (one FTPA award for each of these two target areas). The Application Narrative Template includes Experience Conducting Education & Outreach Activities, Organizational Capacity, Trusted Community Partners and Leveraging Resources, Free Tax Preparation Assistance, and ITIN Application Acceptance Assistance sections detailed below.

## Experience Conducting Education and Outreach Activities

Present a detailed description of:

- a) Your organization's experience conducting similar education and outreach campaigns in appropriate languages to low-income individuals and families in the specified target area. A minimum of three years of experience is required.
- b) Operational readiness and expertise in conducting, budgeting, and implementing similar scale outreach and free tax preparation assistance activities.

## Organizational Capacity

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

- a) The geographic area(s) to be targeted, including:
  - County
  - 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 community-based organizations (CBOs) to reach eligible individuals and families receiving public benefits such as CalWORKs, CalFresh, or MediCal.
- c) Why the type(s) of outreach chosen is/are determined to be the most effective method for reaching the proposed target area and eligible population to be served.
- d) Efforts to ensure proposed education and outreach activities reach:
  - Californians who are eligible for, or have never claimed, the CalEITC, regardless of whether they've filed taxes previously, including noncitizen workers who file using an ITIN.
  - Noncitizen Californians who may be eligible to apply for an ITIN.
  - Individuals and families whose low income does not require them to file a tax return but may be eligible for CalEITC and other tax credits.
  - Families with a qualifying child younger than six years old as of the last day of the taxable year and eligible for YCTC or who may be eligible for the federal Child Tax Credit

- Culturally diverse low-income eligible populations in multiple languages.
- 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, including noncitizen Californians who file using an ITIN or who may be eligible for an ITIN.
- f) Describe the service delivery strategy to be used to connect low-income people with local free tax preparation sites or online tax preparation to help people file their taxes at no-cost.
- 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., noncitizen workers, interpreters for individuals hard of hearing, or with Limited English Proficiency).
- g) Describe how data will be collected to ensure accurate and timely submission of outcomes and expenditures.

### Trusted Community Partners and Leveraging Resources

Applicants are required to engage trusted community partners with their education and outreach efforts and free tax preparation assistance services. Engaged partners should have established trusted relationships with low-income community members, preferably with CalEITC, YCTC, the federal EITC and Child Tax Credit, ITIN, 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 Workplan (CSD 171)
- Efforts involving coordinating with public benefit agencies as well as public and private faith-based schools, social services programs, as well as veteran and disability entities

## Free Tax Preparation Assistance Services

- a) Describe your organization's plan to expand free tax preparation services in your target area. Be sure to address your efforts to offer new or expanded free tax preparation assistance, for example, expanded site offerings, extended hours of operation, expanded online services, and increased staffing.
- b) Describe your organization's strategies for volunteer tax preparer recruitment, retention, and training. Plans should include, but are not limited to:
  - Strategies to recruit new volunteers to support the expanded services;
  - Method that you will use to train volunteers, such as self-study, online, 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.

## ITIN Application Acceptance Assistance

The Statewide CalEITC+ and CalEITC+ FTPA grantees are required to assist interested noncitizen California residents with completing and submitting the IRS Form W-7 *Application for Individual Taxpayer Identification Number* free of charge. Statewide grantees may achieve ITIN application acceptance assistance by offering direct services through agency staff trained as IRS certified Acceptance Agents and/or through the use of partner or subcontractor certified IRS Acceptance Agents.

Providing ITIN acceptance assistance is optional for regional and rural grantees based on capacity and locally determined needs. However, regional and rural grantees are required to refer applicants to the statewide grantees or other partners for ITIN application acceptance assistance services.

- a) Describe your organization's no-cost strategies to assist interested individuals with completing and submitting the IRS Form W-7 Application for Individual Taxpayer Identification Number.
  - If applying for CalEITC+ grants for Target Areas 2 through 15, either:
    - Describe your organization's strategies to provide ITIN application acceptance assistance by offering direct services through agency staff trained as IRS certified Acceptance Agents and/or through the use of partner or subcontractor certified IRS Acceptance Agents; or
    - Describe your organization's strategies to refer applicants to the statewide

grantees or other partners for ITIN application acceptance assistance services.

#### 4. Workplan

A total of 50 points is possible for the Workplan (CSD 171). Activities must have measurable, pragmatic, and trackable outcomes for which the applicant's organization or entity can reliably collect and validate.

Applicants must include:

- Identifying demographic information on individuals and families proposed for services, including noncitizen workers;
- An estimate of the number of eligible Californians to be served by CalEITC+ 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 each education and outreach activity that is directly related to the NOFA's goals and objectives. Outcomes must be achievable within the contract 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 all of CSD's contractual terms and conditions. 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 --



**2021 CalEITC+ Education & Outreach Grant**  
**Appendix 1**  
**Map of Target Areas 2-14**

# Appendix 1: 2021 CalEITC+ Education & Outreach Grant Target Areas



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