



The following are the questions posed by stakeholders, the public, and prospective applicants related to the 2025 California Earned Income Tax Credit Plus (CalEITC+) Education and Outreach Grant Notice of Funding Availability (NOFA), and includes questions submitted in response to the Draft 2025 CalEITC+ NOFA and during the Bidder's Conference. A response from the Department of Community Services and Development (CSD) follows each question.

Q: For the Target Area 1: Statewide CalEITC+ (Two Awards) ITIN [Individual Taxpayer Identification Number] requirement: are outreach and awareness metrics sufficient, or would awardees be required to have a certain number of ITIN completed returns?

For the CalEITC+ Grant program, CSD uses the term outcomes instead of metrics. In the context of the NOFA, outreach and awareness outcomes alone are not sufficient. The Work Plan is an element of the application package and requires applicants to project an outcome for total tax returns, estimating the number of both ITIN and Social Security Number (SSN) returns together. The goal here is to record not just outreach touchpoints, but actual impacts on filing.

Q: Can you provide clarification on the nuance between Target Area 1: Statewide CalEITC+ (Two Awards), and Target Area 1: Statewide CalEITC+ Free Tax Preparation Assistance (One Award)? Is the "Target Area 1: Statewide CalEITC+ Free Tax Preparation Assistance (One Award)" more of a focus on tax preparation assistance without the outreach component required in the first?

The primary difference between the two Target Area 1: Statewide Grants is that the Free Tax Preparation Assistance (FTPA) grant does not require the same level of education and outreach activities as the Education and Outreach (E&O) award. The FTPA award allows a maximum of 10 percent of grant activities to education and outreach with a focus on free tax preparation services.

The Statewide CalEITC+ E&O grant requires a minimum of 25 percent of grant activities to education and outreach activities with a focus on CalEITC and other tax credits.

Q: The NOFA still requires budgets to be allocated by the Education & Outreach, Free Tax Preparation, and ITIN sub-programs. If reporting is aligned with these budgets, it continues one of the most significant burdens of this grant, complex accounting. Reporting on expenditures by sub-budget requires that the one grant be administered like three within non-profit GAAP [Generally Accepted Accounting Principles] accounting standards. This increases the cost of grant administration significantly as it adds additional time and reporting complexity to monthly expenditure reporting. We request that expenditures be reported on for

the whole of each grant. Metrics and programmatic reporting should be used to ensure adequacy of performance in the sub-programmatic areas, not budgets.

There are three activities funded under the CalEITC+ Grant program: education and outreach activities, free tax preparation assistance, and outreach to individuals interested in ITIN information and services. Therefore, CSD requires reporting and budgeting to be separated among these three categories.

Q: The NOFA requests efforts to use uniform messaging statewide (page 10); please clarify if grantees are expected to use FTB materials or if awardees would create materials that have the same look/feel.

Outreach materials available through FTB's website provide a foundation for uniformity and accuracy in information; awardees should utilize these materials when creating their own collateral following the guidelines set forth by CSD.

Q: The NOFA requires a Workplan (CSD Form 171) as part of the application (page 31) and again January 9, 2026, and April 30, 2026 (page 26). Can you please explain why three workplans submissions are requested? The cover page refers to streamlined reporting, but this adds additional administrative requirements.

A Work Plan is required with the submission of the application to evaluate items such as the applicant's overall strategy and goal setting. An updated Work Plan is required with the executed contract and at mid-term to allow awardees opportunities to review, adjust, and update their goals and strategies.

Q: As I am looking at the CalEITC NOFA documents I saw that Madera County is not on the map nor on the list of counties. Does this mean Madera cannot apply for this NOFA?

Any eligible organization (See *CalEITC+ Grant NOFA, Part A, Section 15, Eligibility Requirements*, page 27) can apply for any award. Madera county (like all unidentified counties) can be served as part of the Statewide award.

Q: We were awarded funding in June 2024 for Year One for the Trusted Messenger Network (TMN) program through the State of California's Office of Community Partnerships and Strategic Communications (OCPSC).

With the first year's activities now complete, we have not received any confirmation that TMN will be continued for a second year. As part of our TMN activities, we conducted an extensive ITIN outreach and education campaign. Now we would like to continue this messaging through the CalEITC+ program, but we note that "Funding allocated under this grant program will support new or expansion activities and may not replace or supplant existing funding sources."

We currently do not have existing funding sources for ITIN education and outreach, and no clarity on whether we will be awarded funding for year two of

the TMN program (which might include capacity for continuation of ITIN messaging).

Against this background, are we eligible to make an application for CalEITC+? If awarded, the funding would be for a new standalone ITIN education and outreach campaign.

To be eligible to apply for an award, an organization must meet the criteria identified in *CalEITC+ Grant NOFA, Part A, Section 15, Eligibility Requirements*, page 27. With respect to the funds not intended to replace or supplant existing funds, awarded funds may not be used to replace resources an organization is already obligated to provide. If awarded, funding must be used for new or expansion activities following all requirements in the NOFA.

Q: Are organizations allowed to submit more than 2 letters of references?

Yes, organizations are allowed to submit more than two letters of reference.

Q: Is there a minimum number of tax filings that we should serve in order to be competitive? Are current grantees in a separate funding cohort, or would they also be applying for this?

The Work Plan, an element of the application package, requires applicants to project an outcome for total tax returns estimating the number of both ITIN and SSN returns together. Applicants are expected to set achievable outcomes. For each target area, applicants will be ranked based on total score achieved against other applicants from the same target area. Each submission will be reviewed impartially; all applications will be evaluated using the same criteria to ensure transparency and fairness.

Q: How was the NOFA disseminated and shared with potential grantees?

The CalEITC+ Grant NOFA is posted on CSD's public website, and listed on the California Grants Portal [Grants.ca.gov](https://grants.ca.gov), which links to CSD's public website. CSD also sent a public notice via email with the link to CSD's public website and posted the availability of the NOFA to CSD's social media on Twitter/X and Facebook.

Q: Can responses to Q&A be provided earlier and/or the deadline for submittal be extended to provide a reasonable amount of time to incorporate learnings from responses given there is less than five working days from when responses are released and submittals are due?

Responses to questions received in writing through August 15, 2025, and from the Bidder's Conference held on August 20, 2025, will be posted by 5:00 p.m. on Friday, August 29, 2025. The deadline to submit applications is 5:00 p.m. on Friday, September 5, 2025. All applications must be submitted electronically to CalEITCGrants@csd.ca.gov.

Q: Given that the awards will be posted on October 21st, can the period of performance begin on November 1st so that selected awardees are able to properly mobilize vendors and payments prior to the January 2026 start of the tax season?

The period of performance for this award is currently scheduled to begin on December 1, 2025.

Q: Will the rankings of applications be used to award contracts in future grant periods if the initial awardee is unable to continue their work?

Per the NOFA, CSD reserves the right to grant fewer or additional awards at its discretion under this announcement.

Q: Excel documents (CSD 171, CSD 171A, CSD 171B, and CSD 171SI) are not formatted in a manner that allows for their easy inclusion in a searchable pdf package. May they be reformatted to be incorporated in such a document or submitted in the native file format?

CSD will accept one electronic submission per Target Area application to CalEITCGrants@csd.ca.gov in the form of a single searchable PDF. CSD will also accept one electronic submission per Target Area application to CalEITCGrants@csd.ca.gov in the same format in which the documents were provided. If documents are submitted in the same format in which they were provided, please compress all documents into a single .zip file.

Q: In Form CSD 171 => E&O Work Plan Definitions tab => Canvassing: Languages - Person-to-Person (row 42): Please clarify why phone calls are mentioned in the Canvassing: Person-to-Person metrics given there is a separate phone calls section?

There was an error in the CSD 171 E&O Work Plan definitions under the heading "Canvassing: Languages-Person-to-Person." An updated version titled "UPDATED_2025 CalEITC+ NOFA Work Plan" (CSD 171) is available in the [Bidder's Library](#), which includes the following correction:

"Provide a list of languages in which person-to-person conversations are expected to be held by awarded organization or partner(s) to provide information about CalEITC, tax credits, FTPA services, and/or ITIN related services."

CSD will accept either version of the CSD 171 as part of an application submission.

Q: In Form CSD 171 => E&O Work Plan Definitions tab => Group Events (rows 52 and 53): Group Events are defined as not including FTPA sites and tax preparation events. How should attendees of free tax events open to the general public that are receiving only education and outreach materials and not receiving free tax prep assistance be reflected in outcomes?

When calculating projected outcomes for the Work Plan, use the definitions provided for each category, including the number of events, the number of attendees at events, the number of persons spoken to person-to-person, and the number of collateral materials distributed. The activities referenced in this comment are optional for the Education & Outreach portion of the grant.

Q: In Form CSD 171A&B => Budget Definitions tab => Salary, Wages & Fringe Benefits (rows 8, 19 and 28): For the budget detail, if many staff members are funded by the grant, can we provide that in a separate chart/document?

No. For each application, all budget detail information must be included on the Budget Detail worksheet. There is no limit to the number of rows that can be added to the Budget Detail worksheet.

Q: In CSD Form 171A&B => Budget Definitions tab => ITIN Education & Outreach => 18. Subcontractor (row 29): Can you please clarify why FTPA activities are mentioned in the ITIN Subcontractor section?

There was an error in the Budget Definitions for CSD 171 A&B. An updated version titled "UPDATED_2025 CalEITC+ NOFA Budget Workbook" (CSD 171 A&B) is available in the [Bidder's Library](#), which includes the following correction:

"Subcontractors that will engage in education and outreach activities and receive funding must be listed on CSD 171SI with the organization's name and amount of the subaward. If the sub-organization's name is unknown at the time of creating the budget, a place holder line listing the expected number of awards and amount for each award is permitted until the names of the sub-organizations are known, at which time a modified Budget and an updated CSD 171SI must both be submitted."

CSD will accept either version of the CSD 171 A&B as part of an application submission.

Q: CSD Form 171SI does not request subaward amounts. Can you please clarify where this information is provided?

Subaward amounts should be listed in both the Budget Detail, under the heading of Cost, and in the CSD Form 171SI, under the heading Brief Description of Activities.

Q: Will monthly reporting be required?

Expenditure reports are due monthly, Program reports are due every other month; and the Final report will be due in August 2026. See *2025 CalEITC+ Grant NOFA, Part A, Section 13, Grant Requirements: All Awards*, pages 25-26.

Q: Can the CBO [Community-Based Organization] responsible for E&O [Education and Outreach] be the lead applicant, with the VITA-providing [Internal Revenue Service (IRS) Volunteer Income Tax Assistance Program-providing] org [organization] as the sub-applicant?

Applicants may list subcontractors that support the grant goals and the applicant's ability to reach the priority population within the designated Target Area for which the applicant is applying. The 2025 CalEITC+ Grant NOFA application does not allow sub-applicants but does allow for subcontractors.

Q: Here in our area we have the E&O (Education and Outreach) and we have FTPA (Free Tax Preparation Assistance). Would our organization be able to apply for both and be awardable?

Yes. 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 required 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. See *2025 CalEITC+ Grant NOFA, Part A, Section 10, Available Funding*, page 24.

Q: Is it possible to receive a list of bidder's conference today so we can see who might contact to discuss collaboration?

CSD is not planning on releasing a copy of the Bidder's Conference attendees.

Q: So I just want to ask if organization with newly established partnerships with VITA eligible? Or is eligibility limited to organization, with assistant partnerships only.

To be eligible for funding under this NOFA, applicants must meet all of the following requirements (See *2025 CalEITC+ Grant NOFA, Part A, Section 15, Eligibility Requirements*, page 27):

- "Be a private or non-profit organization that qualified for and received an IRS determination letter confirming the organization's tax exemption under section 501 of the Internal Revenue Code registered with the California Secretary of State.

- Be an existing VITA program administrator, *maintain sub-grants with existing VITA program administrators, or have an existing or prior relationship with a VITA Program provider* (emphasis added).
- 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/>).
- Be in good standing with federal and state administering grant-issuing agencies.”

Q: Is it sufficient to provide materials in Spanish through sub-contractors and community partners or do we need to have staff fluent in Spanish?

Awardees must conduct activities and messaging at a minimum in both English and Spanish. You are allowed to provide services in-house, or through a sub-contracted Spanish translation service.

Q: We do have an established partner partnership with the VITA provider. Is that just that establishment? Or do we need to provide some sort of formal documentation of that partnership as an existing CalEITC grantees?

For the application process, CSD requires disclosure of your partnership(s) with VITA site(s) on the CSD 171 Work Plan.

Q: Can you clarify the areas where tax preparation is available? Is it just LA County?

All grantees are required to provide Free Tax Preparation Assistance (FTPA) services. There is a separate FTPA-focused grant that serves only Los Angeles County, and another FTPA-focused grant that serves Statewide.

Q: Is it one award per agency? Or is it possible we have a presence in multiple California counties. Is it possible to get more than one?

An applicant may apply for and receive an award for more than one target area. Applicants must submit a separate application for each target area to be considered for funding and are required 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. See *2025 CalEITC+ Grant NOFA, Part A, Section 10, Available Funding*, page 24.

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 at its discretion under this announcement. See *2025 CalEITC+ Grant NOFA, Part A, Section 12, Expected Number of Grants*, page 25.

Q: On the Payee Data Record form, the third number of the FEIN [Federal Employer Identification Number] is slightly obscured by the dash. Is that ok?

The California Department of Finance (DOF) maintains jurisdiction over the STD 204 Payee Data Record. CSD suggests that an applicant double-checks all information is legible prior to submitting the application package.

Q: Is it possible to share the list of current grantees for these services?

A partial list of grantees for the 2021 through 2025 program years can be found at <https://www.csd.ca.gov/Shared%20Documents/2021-CalEITC+Grant-Notice-of-Intent-to-Award.pdf>. In addition, the Ventura/Santa Barbara and San Joaquin/Stanslaus regions were served by Golden State Opportunity and United Ways of California.

Q: Can you explain further what you mean by collateral materials?

Collateral materials are any marketing products designed to inform, engage, and persuade eligible tax filers. They are distributed individually, including distributing messaging in multiple languages that are culturally appropriate for priority audiences and demographics through the following media:

- Flyers/Brochures
- Direct mailers
- Newsletters

Q: With current immigration action, how can the department ensure that our communities, specifically ITIN [Individual Tax Identification Number] applicants, information will not be used to conduct more targeted raids?

The purpose of the bidder's conference is to answer questions regarding the 2025 CalEITC+ Grant NOFA. This question is outside the scope of the NOFA.

Q: It states that tax returns must be filed electronically. Is there a percentage of paper returns that is acceptable?

Awardees 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. See *2025 CalEITC+ Grant NOFA, Part A, Section 13, Grant Requirements: All Awards*, page 26.

Q: In the application narrative are the community partner listings counted in with the page limits?

The community partner listings are counted within the 20-page limit.

Q: For Media metrics, does number of ads mean number of impressions?

From the definitions outlined in the Education and Outreach Work Plan, the number of ads is the expected total number of ads that will run during the grant period. The Work Plan does not require impressions.

Q: Can we apply if we are not a VITA site?

To be eligible for funding under this NOFA, applicants must meet all of the following requirements (See *2025 CalEITC+ Grant NOFA, Part A, Section 15, Eligibility Requirements*, page 27):

- “Be a private or non-profit organization that qualified for and received an IRS determination letter confirming the organization’s tax exemption under section 501 of the Internal Revenue Code registered with the California Secretary of State.
- Be an existing VITA program administrator, maintain sub-grants with existing VITA program administrators, or have an existing or prior relationship with a VITA Program 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/>).
- Be in good standing with federal and state administering grant-issuing agencies.”

Q: As we have had issues collecting data in the past, will ITIN be mandatory or do we just need to track passing out the information?

The CalEITC+ and CalEITC+ FTPA awardees are required to provide outreach and promote awareness of ITIN eligibility and raise awareness to empower residents to make informed decisions about whether to apply. Providing no-cost ITIN application acceptance assistance is optional for the awardee based on capacity and locally determined needs. See *2025 CalEITC+ Grant NOFA, Part A, Section 9, Target Areas*, pages 16-23.

Awardees must comply with all program and fiscal reporting according to the following schedule: an updated Workplan will be due in January, followed by an updated Workplan due mid-term; Expenditure reports are due monthly; Program reports are due every other month; and the Final report will be due in August. Specific reporting requirements will be detailed in the contract. CSD reserves the right to amend reporting requirements. See *2025 CalEITC+ Grant NOFA, Part A, Section 13, Grant Requirements: All Awards*, page 26.

Q: Our organization is debating not assisting with ITIN services as a result of ITIN tax client's info used against them. Will doing so hurt our funding prospects?

Awardees must prioritize eligible populations, including interested California residents who may file using an ITIN. See *2025 CalEITC+ Grant NOFA, Section 5, Goals and Objectives*, page 9. The CalEITC+ and CalEITC+ FTPA awardee is required to provide outreach and promote awareness of ITIN eligibility and raise awareness to empower residents to make informed decisions about whether to apply. Providing no-cost ITIN application acceptance assistance is optional for the awardee based on capacity and locally determined needs. See *2025 CalEITC+ Grant NOFA, Part A, Section 9, Target Areas*, pages 16-23.

Q: In the Education and Outreach definitions for Web, it asks for Unique Visits and first-time visits. Unique visits aren't tracked in Google Analytics 4, but their calculation of Users is by default unique visitors. Can we report the User metric with the understanding that it represents unique visitors, or do we need to parse the number of unique site visits? Additionally, can first-time visits be understood and reported as New Users?

Specific reporting requirements will be detailed in the contract. Within the scope of the Work Plan, applicants are required to project the number of unique visits to their website dedicated to promoting and maximizing awareness of the CalEITC, Young Child Tax Credit, Foster Youth Tax Credit, federal EITC, Child Tax Credit, and ITIN eligibility. Unique visits describe which users are visiting the website for the first time. It is the applicant's responsibility to estimate the number of unique visits and provide the methodology used in the Work Plan narrative and Application Narrative Template.

Q: Can you clarify what you mean by vendors on the Subcontractor information sheet?

Per the definitions in the CSD 171SI Subcontractor and Vendor Information worksheet, a subcontractor performs a substantive portion of grant-related activities to accomplish the goals set out by the Work Plan. A Vendor provides goods and/or services for grant-related activities.

Q: For the FTPA Workplan:

- **FTPA- Total Tax Returns metric- is that state and federal returns added together?**

Yes, for the Free Tax Preparation Assistance Work Plan, state and federal tax returns are added together.

- **FTPA - Number of FTPA sites - total number of sites to be counted by each SIDN (Site Identification Number) or will each mobile site be counted separately (i.e. pop-up events)**

In the Free Tax Preparation Assistance Work Plan, applicants may list all Free Tax Preparation sites separately by location, even if they share a Site Identification Number (i.e., pop-up events).

Q: Standalone application: could an organization that has statewide presence, simply do "one" application to cover all applicable service sites?

Target Area 1 Statewide CalEITC+ awardees will serve eligible residents statewide. The statewide awardees will provide coverage to the broadest audience, reaching the largest number of eligible Californians through a variety of outreach strategies. Statewide awardee 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.

Awardees for Target Areas 2 through 14 are required to serve the counties listed in the table found on pages 15 and 16 of the 2025 CalEITC+ NOFA. For instance, if an organization receives funding for Target Area 3 (San Diego County), those funds must be used exclusively to support services within San Diego County.

Applicants must submit individual applications for each target area they wish to serve. If selected, they are required to track and report outcomes separately for each of the awarded areas. Each application will be evaluated independently and should be tailored to address the specific needs of the corresponding target area.

Q: The NOFA asks for proposals to be submitted in one searchable PDF, but today we heard that proposals should be submitted in the format provided, which also includes Excel sheets and Word docs. Confirming we should submit in the format in which they were provided?

CSD will accept one electronic submission per Target Area application to CalEITCGrants@csd.ca.gov in the form of a single searchable PDF. CSD will also accept one electronic submission per Target Area application to CalEITCGrants@csd.ca.gov in the same format in which the documents were provided. If documents are submitted in the same format in which they were provided, please compress all documents into a single .zip file.

Q: Would it be possible to learn how many applicants applied last year for this program?

The CalEITC+ grant program last solicited applications in 2021. A list of awardees from 2021 is available on CSD's public website under [View Archived Contracting Opportunities](#).

Q: Do we need to have an agreement with a VITA provider to provide messenger and outreach or can we use volunteer tax preparers?

Restated: Do we have to have an existing relationship in place if we are applying for mainly the outreach part?

Applicants must be an existing VITA program administrator, maintain sub-grants with existing VITA program administrators, or have an existing or prior relationship with a VITA Program provider. See *2025 CalEITC+ Grant NOFA, Part A, Section 15, Eligibility Requirements*, page 27.

Q: Would ITIN education services include offering Financial Literacy classes which covers the ability to apply and use an ITIN for taxes and banking?

Per the *2025 CalEITC+ Grant NOFA, Part A, Section 4, CalEITC+ Glossary of Terms*, page 8:

“ITIN Eligibility Awareness: Information provided to interested and eligible California residents, their spouses, and dependents about the purpose and availability of the ITIN; ITIN eligibility awareness is intended for all interested residents who do not have an SSN but may be eligible to acquire an ITIN and receive state tax credit(s) (CalEITC and Young Child Tax Credit) when they file their state tax return. This activity is designed to raise awareness about ITIN eligibility and empower individuals to make informed decisions about whether to apply.”

Activities which meet this definition are allowable activities.

Q: Kings County and a few others have been removed from the rural site list on page 40. Are we still able to use them as a subcontractor?

Applicants may list subcontractors that support the outreach goals and the ability to reach the priority population within the designated Target Area for which the applicant is applying. Applicants and subcontractors are not required to be located in the Target Area they serve, however, funds allocated to a specific Target Area must be used exclusively to support services within that Target Area. Kings County was not listed as a rural county under the prior grant program.

Q: The Target Area 2 Los Angeles CalEITC+ FTPA awardee is required to dedicate 10 to 30 percent of their activities toward ITIN eligibility awareness activities, up to 90 percent for free tax preparation assistance, and a maximum of 10 percent for free tax preparation education and outreach. May you clarify - for example, 10% is going towards ITIN awareness, 60% goes to free tax prep assistance, and 10% is for free tax prep education and outreach, would the remaining 20% be for CalEITC E&O?

No. Statewide and Los Angeles County Free Tax Preparation Assistance (FTPA) applicants are required to budget a maximum of 10 percent of their total award for

education and outreach activities. Education and outreach activities performed by CalEITC+ FTPA applicants may include any of the activities listed in the Education & Outreach section. However, Statewide and Los Angeles County FTPA applicants are only required to complete the Free Tax Preparation Assistance Activities and ITIN Education and Outreach sections of the CSD 171A (Budget Summary) and 171B (Budget Detail) and not the Education and Outreach Activities section. Statewide and Los Angeles County FTPA applicants should list education and outreach activities in the FTPA Education & Outreach line item under Free Tax Preparation Assistance Activities in the Budget forms (CSD 171A and 171B).

Q: How many applications are allowed per organization?

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 required 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. See *2025 CalEITC+ Grant NOFA, Part A, Section 10, Available Funding*, page 24.

Q: Can you please clarify the comment that all renewals are tied to the contract terms. Can contracts be renewed/extended?

The anticipated contract term for each awarded contract shall be from December 1, 2025, through September 30, 2026. The period of performance shall be from December 1, 2025, through June 30, 2026. Awarded funds must be fully exhausted by June 30, 2026. At CSD's sole discretion, each contract may be amended annually to extend the contract term for additional time, subject to funding availability and program requirements. There is no obligation for CSD to exercise its right to extend any contract. See *2025 CalEITC+ Grant NOFA, Part A, Section 14, Contract/Funding Term*, page 27.

Q: For clarity, if our county is not on the 2025 California Earned Income Tax Credit Plus (CalEITC+) Education and Outreach Grant page we are placed under 'rural' counties correct?

No, please refer to *Appendix 2 List of Rural Counties* in the 2025 CalEITC+ Grant NOFA for a list of the rural counties. Any county not listed as a target area or as a rural county in the 2025 CalEITC+ Grant NOFA can be served as part of the Statewide award.

Q: Will an amendment to the NOFA be sent out if changes need to be made?

Yes.

Q: Eligibility question – I’m a marketing consultant that have experience running CalEITC E&O program in my prior role. If I am prospecting VITA partners to support their E&O efforts, would I be able to apply with them or do I need to have an established relationship prior to this bidder conference or application submission?

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

- “Be a private or non-profit organization that qualified for and received an IRS determination letter confirming the organization’s tax exemption under section 501 of the Internal Revenue Code registered with the California Secretary of State.
- Be an existing VITA program administrator, maintain sub-grants with existing VITA program administrators, or have an existing or prior relationship with a VITA Program 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/>).
- Be in good standing with federal and state administering grant-issuing agencies.” See *2025 CalEITC+ Grant NOFA, Part A, Section 15, Eligibility Requirements*, page 27.

Q: Will there be a maximum number of awards?

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 at its discretion under this announcement. See *2025 CalEITC+ Grant NOFA Part A, Section 12, Expected Number of Grants*, page 25.

Q: Can awardees conduct activities and messaging in English and Vietnamese? Or does it have to be English and Spanish (plus additional languages)?

Awardees must disseminate clear, accurate, and consistent information to priority audiences, including culturally diverse and hard-to-reach populations, to increase awareness of the available tax credit(s), knowledge of the ITIN purpose and application process, and access to free tax preparation assistance services in English, Spanish, and other languages, as applicable. See *2025 CalEITC+ Grant NOFA, Part A, Section 5, Goals and Objectives*, page 9.

Q: Can you please provide greater detail and clarity to the scoring/evaluation criteria?

Scoring details are available in Part C: Evaluation Process on pages 32 – 34 of the *2025 CalEITC+ Grant NOFA*.

Q: I think you answered it earlier, but we asked if you were going to reissue the NOFA materials with corrections. Did you say no amendments?

CSD may issue an addendum to the NOFA should the need arise.

Q: In Budget Definitions, the example given is Program Coordinator 35%. So for multiple staff members, we would just list each staff person and their percentage?

For application purposes only, CSD will accept the Salary, Wages & Fringe Benefits line item in the Budget Detail (CSD 171B) completed following the example given on the Budget Definitions tab or completed following the example given on the Budget Instructions tab in the budget workbook.

Q: Is there a limit in the budget on how much to spend to promote community events? Say you are granted 100,000 for community events to assist community folks that speak Spanish. How much can be spent in promotion over public media of these events to get people to each event?

Both the Statewide and Los Angeles County Free Tax Preparation Assistance Target Area CalEITC+ applicants are required to dedicate 10 to 30 percent of their activities toward ITIN eligibility awareness activities, up to 90 percent for free tax preparation assistance, and a maximum of 10 percent for free tax preparation education and outreach.

All other Target Area applicants are required to dedicate 10 to 30 percent of their activities toward ITIN eligibility awareness activities, a minimum of 25 percent of their activities toward education and outreach, and a minimum of 25 percent of their activities toward free tax preparation assistance. Based on meeting these requirements, awardees have the flexibility to allocate 40 percent of funded activities towards any mix of service categories based on their assessment of target area needs. See *2025 CalEITC+ Grant NOFA, Part A, Section 9, Target Areas*, pages 16-23.