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GAVIN NEWSOM  
GOVERNOR

July 29, 2019

Notice of Funding Availability  
California Earned Income Tax Credit  
2019 CalEITC Education and Outreach Grant

**Important Dates**

NOFA Release Date – July 29, 2019  
Bidder's Conference – August 7, 2019  
Deadline for Submitting Questions – August 8, 2019  
Notice of Intent to Apply Due – August 9, 2019  
Questions & Answers Posted on CSD Public Website – August 12, 2019  
**Deadline for Submitting Applications – August 19, 2019 by 5:00 p.m.**  
Notice of Awardees Posted – September 16, 2019

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**Appendix 1: Map of Target Areas**

**Appendix 2: Frequently Asked Questions (FAQs)**

## Part A: CalEITC Education and Outreach Grant Overview

### 1. Department Overview

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

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

### 2. Background

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

In 2015, California established the first-ever California EITC (CalEITC), extending a new cashback credit to the poorest working families in the state. Now in 2019, California has expanded CalEITC to further assist families facing poverty. The Fiscal Year (FY) 2019-20 California State Budget Act more than doubles the investment in CalEITC to \$1 billion, which is estimated to increase the number of participating households from 2 million to 3 million. The creation and expansion of CalEITC, when combined with the federal EITC, increases the potential value of tax credits available for low-income families to more than \$6,000. For the 2018 tax year, 1,917,562 CalEITC tax credits were issued totaling more than \$353 million with an average credit of \$184<sup>1</sup>.

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<sup>1</sup> Franchise Tax Board CalEITC Total Statistics; Run date 6/3/2019

To maximize the participation and claiming of CalEITC by eligible Californians, the FY 2019-20 Budget Act also expanded the credit to help low-income families with young children through a new \$1,000 credit for families with children under the age of six, significantly increased the average yearly amount individuals receive through the credit, and expanded income eligibility to \$30,000 to include full-time workers making the 2022 minimum wage of \$15 an hour. The Budget Act appropriated \$10 million to the Franchise Tax Board (FTB) to increase awareness of CalEITC and provide free tax preparation assistance. Of the amount appropriated, \$5 million is designated for CalEITC education and outreach activities, and \$5 million is to support community-based and nonprofit organizations that provide free tax preparation assistance services. CSD has partnered with FTB to make grant funds available for CalEITC education and outreach efforts under this Notice of Funding Availability (NOFA). A separate NOFA was recently released to make grant funds available for free tax preparation assistance.

Awarded CalEITC Education and Outreach grantees will embark on efforts to further increase the number of CalEITC eligible Californians reached for the 2019 tax filing season. The efforts employed will include outreach to all eligible populations including those that have never filed their taxes, coordinating with public benefits agencies, and increasing efforts to ensure eligible Californians file their taxes at a free tax preparation assistance site. CSD will employ lessons learned from previous grants to improve existing infrastructure and capacity to administer the grant funding to organizations and entities to deliver education and outreach to low-income individuals and families.

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

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

Activities must connect low-income residents with local free tax preparation sites or online resources that help people file their taxes at no-cost and claim the federal and state EITC credits, such as free online tax preparation (e.g., FTB's CalFile). Grantees will work closely with local free tax preparation assistance 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. Applicants should conduct cost-effective education and outreach activities that will inform community members about the availability of the CalEITC and the importance of filing their taxes. Funding will support new or expansion activities and may not replace or supplant existing funding sources.

#### 4. Goal and Objectives

Goal:

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

Objectives:

- Partner with trusted organizations in the community to implement effective education and outreach activities
- Deliver education and outreach that promotes and maximizes awareness of CalEITC and free tax preparation assistance programs. Information should also be provided on the federal EITC
- Target eligible populations residing in areas identified as having a high percentage of unclaimed credits
- Disseminate clear, accurate, and consistent information to target audiences, including culturally diverse, hard-to-reach populations, to increase awareness of CalEITC and the free tax preparation assistance program in English, Spanish, and other languages, as applicable
- Motivate eligible low-income individuals and families to file and receive CalEITC credits, which includes providing information on local, free tax filing services
- Provide data on outreach efforts to support the evaluation of the most effective outreach strategies to reach the targeted populations

#### 5. Targeting

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

##### i) Income Eligibility:

Education and outreach activities must target individuals and families with incomes at or below the CalEITC filing requirement based on the income limits established for the 2019 tax year. The maximum eligible earned income for 2019 tax year is \$30,000. Applicants must detail their plans to reach CalEITC eligible Californians in the Scope of

Work (CSD 171) and Application Narrative Template (CSD 171ANT).

Table 1: 2019 CalEITC Income Eligibility
\$30,000 if there are no qualifying children
\$30,000 if there is one qualifying child
\$30,000 if there are two or more qualifying children

ii) Messaging:

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

Efforts should be made to use uniform messaging statewide. To achieve this, grantees should utilize the example education and outreach collateral materials provided through the CalEITC4Me website at: <http://caleitc4me.org>.

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

- Franchise Tax Board: <https://www.ftb.ca.gov/file/personal/credits/california-earned-income-tax-credit.html>
- Internal Revenue Service: <https://www.eitc.irs.gov>

All messaging delivered as a part of this effort should be culturally sensitive and customized to the population in which the education and outreach materials are being distributed. Messaging should encompass, at a minimum, the required elements illustrated in Table 2 below. Messaging should also be targeted towards the populations detailed below, with an emphasis on those newly eligible to claim CalEITC and/or populations that will benefit from the 2019 expansion of CalEITC (e.g. families with children):

Table 2: Required Elements	Target Populations
Availability of state EITC	Californians who have never claimed the EITC
Availability of federal EITC	Californians who are not required to file taxes due to low income
Free tax preparation assistance	Families with children age six and younger
Where to get more information	Workers with incomes up to \$30,000
	Seniors ages 65 and older
	Young adults ages 18-24.
	Self-employed workers

iii) Geographic Area:

Education and outreach shall be provided to areas identified as having the highest proportion of eligible California residents not claiming the credit. Target Areas are identified in Section 7 (Available Funding) and Appendix 1: 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>. Focus of outreach may include the following common characteristics identified in Table 3 below.

Table 3: Characteristics of Those Failing to Claim
Areas of high concentration of Hispanics
Individuals with lower incomes than required to file a tax return
Parents (particularly mothers) of children of color
Individuals participating in CalFresh / Supplemental Nutrition Assistance Program (SNAP)
Individuals without qualifying children
Populations with Limited English Proficiency
Culturally diverse populations and communities

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



6. Education and Outreach

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

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

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

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

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

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

✓	Canvassing	<p>Make contact in targeted residential neighborhoods and community gathering places to engage individuals and families in one-on-one interactions.</p> <p>Canvassing options may include traditional door-to-door type activities or may be achieved through text messaging campaigns/phone banking to reach potentially eligible Californians.</p>
	Media	<p>Educate through media outlets including:</p> <ul style="list-style-type: none"> <li>• Print</li> <li>• Radio</li> <li>• TV (e.g. solicit local news coverage and participate in interviews to educate viewers in targeted areas)</li> <li>• Internet/Website Ads</li> <li>• Social Media Promoted/Boosted Ads</li> </ul>
	Collateral Messaging	<p>Distribute messaging in multiple languages as appropriate for the target audience and demographics through the following mediums:</p> <ul style="list-style-type: none"> <li>• Flyers/Brochures</li> <li>• Direct mailers</li> <li>• Newsletters</li> </ul>
	Group Events	<p>Host or participate in coordinated outreach events to engage groups of eligible people (more than one individual/family) at places like:</p> <ul style="list-style-type: none"> <li>• Community gatherings/Resource fairs</li> <li>• Mega events</li> <li>• Local businesses</li> <li>• Bus tours</li> <li>• Educational forums</li> <li>• Local free tax preparation assistance and filing services, such as Volunteer Income Tax Assistance (VITA) sites</li> <li>• Grocery stores/Libraries</li> <li>• Food banks</li> <li>• Churches</li> <li>• Health care clinics</li> <li>• Schools</li> <li>• City Council Meetings</li> </ul>
	Other	<ul style="list-style-type: none"> <li>• Other effective outreach strategies</li> </ul>

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

## 7. Available Funding

A total of \$5 million is available to specifically support CalEITC education and outreach activities. Funds will be awarded to grantees serving low-income individuals and families across the state. Funding allocations are based on 15 target areas, which are described below.

An applicant may apply for more than one target area. Applicants must submit a separate application for each target area to 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.

### Target Area 1: Statewide

Target Area 1 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 grantees are not required to reach every single county throughout the state but should focus on activities designed to make an impact on the largest populations including, but not limited to, social media, hosting mega events, airing public service announcements, radio interviews, call center engagement, etc. Statewide grantees may support canvassing efforts, but it is not a requirement. Statewide grantees may also incorporate and oversee mini grants targeted in specific areas to have the largest impact possible. The statewide grantees must consider economies of scale and coordination of efforts with other target areas.

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

### Target Areas 2-14

Grantees for Target Areas 2 through 14 will serve eligible residents living in counties identified as having the highest proportion of eligible California residents not claiming EITC. Counties were identified by considering the number of potentially eligible Californians with incomes at approximately the CalEITC income level by county using Census data and the number of CalEITC filers claiming the credit. Outreach should be concentrated in

communities where eligible individuals reside. The target areas are identified below and in further detail in Appendix 1: Map of Target Areas.

Target Area	Region
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

*Target Area 15: Rural Counties*

The Target Area 15 grantees will serve rural residents in counties identified as those with a general population of less than 100,000 as defined by the California State Association of Counties. Butte County has been added to Target Area 15 to achieve geographic efficiencies in service delivery. Rural counties are identified in Appendix 1: Map of Target Areas.

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

Funding Allocations

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

Geography	Funding Allotment
Statewide	\$820,000
Target Areas 2 – 14	\$3,960,000
Rural Counties	\$220,000
<b>Total</b>	<b>\$5,000,000</b>

Below is a breakdown of the funding allotments for each target area. An applicant may only apply for the full amount found under the “contract award” column on the table below. The applicant’s proposed budget (CSD 171A and CSD171B) must reflect the full contract award.

Target Area	Region	Allotment by Region	Proposed # of Grants	Contract Award
1	Statewide	\$820,000	2	\$410,000
2	Los Angeles County	\$1,341,000	3	\$447,000
3	San Diego County	\$376,000	1	\$376,000
4	Alameda/Santa Clara Counties	\$361,000	1	\$361,000
5	Sacramento County	\$225,000	1	\$225,000
6	Riverside County	\$225,000	1	\$225,000
7	Orange County	\$219,000	1	\$219,000
8	Contra Costa/Sonoma Counties	\$192,000	1	\$192,000
9	San Bernardino County	\$185,000	1	\$185,000
10	Kern/Tulare Counties	\$174,000	1	\$174,000
11	Fresno County	\$147,000	1	\$147,000
12	San Joaquin/Stanislaus Counties	\$156,000	1	\$156,000
13	San Francisco/San Mateo Counties	\$251,000	1	\$251,000
14	Ventura/ Santa Barbara Counties	\$108,000	1	\$108,000
15	Rural Counties	\$220,000	2	\$110,000

## 8. Inappropriate Use of Funds

The following restrictions apply to grants made under this funding:

Funds ***must not*** be used to supplant existing federal, state, or private funds allocated to conduct the same or similar work. Funds may not be used for any political or legislative advocacy work, nor to promote organizations, names, etc. of grantees. Funds may not be used to incentivize participation from partners or other eligible individuals such as in a raffle or a social media challenge. Costs are to be allocated for outreach and education activities and are not intended to support organizational overhead. Considering the limited amount of grant funds available, applicants should make every effort possible to minimize overhead/administrative costs and target available funding toward providing direct services for eligible Californians.

## 9. Expected Number of Grants

CSD anticipates awarding a total of approximately 19 grants from this NOFA, subject to availability of funds and the quality of applications received. CSD reserves the right to make fewer or additional awards under this announcement.

## 10. Grant Requirements

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

- Funds must be spent in a manner that serves the intended purpose of providing EITC education and outreach to eligible California residents.
- Funds must be used for cost-effective education and outreach activities having a measurable outcome that is trackable.
- Grantees must target households with incomes at or below the filing limit.
- Grant funds must support new EITC education and outreach activities or expand upon existing efforts. These funds are not intended to replace or supplant existing EITC education and outreach funds.
- Grantees must allot ten percent (Rural and Statewide grantees are exempt) of award funding to increase awareness of local Free Tax Preparation Assistance services provided by state grantees under the Free Tax Preparation Assistance grant program. If the Education and Outreach grantee's respective target area(s) does not have a county-level Free Tax Preparation Assistance awardee, then the grantee must allot the ten percent of the award funding to coordinate with other local free tax preparation assistance sites or with a Statewide Free Tax Preparation Assistance grantee.

- Submission of all application packet documents by the due date (refer to Application Package Documents List).
- Grantees must conduct activities and messaging at minimum in both English and Spanish.
- Grantees must comply with programmatic and fiscal reporting.
- Grantees must participate in coordination calls with CSD and awarded grantees.
- Grantees must collaborate with each other and free tax preparation assistance programs to optimize education and outreach efforts for overlapping taxpayers or geographic areas.
- Grantees must collaborate with 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.
- Grantees must possess insurance by the start of the contract term. Insurance requirements may include self-insurance, workers' compensation insurance, commercial or government crime coverage (fidelity bond), general liability insurance, and vehicle insurance. Specific requirements will be outlined in the awarded applicant's contract.

## 11. Contract/Funding Term

The anticipated contract term for each awarded CalEITC Education and Outreach contract shall be from October 1, 2019 through June 30, 2020. At CSD's sole discretion, each contract may be extended for one additional year, through June 30, 2021, depending on funding availability. There is no obligation for CSD to exercise its right to extend the contract.

## 12. Eligibility Requirements

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

- Be a tax-exempt organization or government entity including:
  - Private, non-profit, or public organization that qualified for and received an Internal Revenue Service determination letter confirming the organization's tax exemption under section 501 of the Internal Revenue Code;
  - A local government agency (state agencies are ineligible for funding);
  - A federally recognized Indian Tribal Government; or
  - A registered business entity with the California Secretary of State.
- Eligible to receive public funds (list of entities that have been declared ineligible to receive government funds can be found at <https://www.sam.gov/>); and

- Be in good standing with federal and state administering grant issuing agencies.

### 13. Minimum Qualifications

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

- Knowledge of the CalEITC and free tax preparation assistance program;
- Three years of experience successfully providing, coordinating, and implementing education and outreach activities that serve low-income populations;
- Established and trusted relationships with community partners serving low-income populations, preferably with partners who have extensive EITC and tax preparation 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 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.

### 14. References

Applicants are required to submit two letters of reference with the submission of the application. Letters are required to be recent, dated within a 12-month period. References should be from organizations that are familiar with the applicant's qualifications, experience, and past performance on education and outreach related work. Applicants who were previously awarded an Education and Outreach grant do not need to submit reference letters.

### 15. 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. 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 will be responsible for paying subcontractors. Selected applicants and their subcontractors are subject to all state laws and regulations.



## 16. Projected Timeline

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

Activity	Date
NOFA Released	July 29, 2019
Bidders' Conference	August 7, 2019
Deadline for Submitting Questions	August 8, 2019
Notice of Intent to Apply	August 9, 2019
Question & Answers Posted on CSD Public Website	August 12, 2019
<b>Deadline for Submitting Applications</b>	<b>August 19, 2019</b>
Notice of Awardees Posted	September 16, 2019
Contracts Sent to Awardees	September 19, 2019
Signed Contract Due Back to CSD	September 27, 2019
Contract Term	October 1, 2019 – June 30, 2020

Applicants receiving an award are asked to return their signed contracts to CSD as expeditiously as possible to prevent a delay in planned education and outreach activities, considering the projected timeline. Grantees must be ready and able to begin work on the first day of the contract term.

## Part B: Application Preparation and Submission

### 1. Bidders' Conference

Potential applicants are strongly encouraged, but not required, to participate in a pre-recorded Bidders' Conference regarding this grant application, which will be released on **August 7, 2019**. The webinar registration link will be available at:

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

## 2. Questions

CSD has compiled a Frequent Asked Questions document to address general inquiries and areas of clarification needed from the 2018 CalEITC NOFA and grant (Appendix 2 – Frequently Asked Questions). However, to ensure fairness, applicants may submit additional questions regarding any part of this NOFA, including technical questions and required attachments. Questions must be emailed to [CSBGDiv@csd.ca.gov](mailto:CSBGDiv@csd.ca.gov) using the following subject line: Questions on 2019-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 August 8, 2019.**

Questions and answers will be posted by CSD on **August 12, 2019** 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 should submit a Notice of Intent to Apply by 5:00 p.m. on August 9, 2019.** 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 it will be applying for the grant. The Notice of Intent to Apply form may be submitted via email at [CSBGDiv@csd.ca.gov](mailto:CSBGDiv@csd.ca.gov) or by mail to:

State of California  
Department of Community Services and Development  
Attn: 2019 CalEITC Education and Outreach NOFA  
2389 Gateway Oaks Drive, Suite 100  
Sacramento, CA 95833-4246

## 4. Application Package Requirements

Applicants must submit all documents listed below. The order indicates how the documents should be collated upon mailing them to CSD. Title is the official title of the form and its form number. File Name refers to the specific Word, Excel, or PDF files each are located in. Please note that the 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	Scope of Work (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 (2018 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 original **single-sided** application package plus four exact copies (Use a paper or binder clip to bind each of the packets – **do not staple any parts of the application or attachments**);
- All completed application documents from the table above (1-9) included with the application;
- Full contact information and applicable signatures for every document.
- Flash Drive with an electronic copy of all application documents (in PDF format); and
- The funding amount requested does not exceed the funding limit;

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

## 6. Application Submission Instructions

Only hard copy paper submissions will be accepted. **Applications must be received by 5:00 p.m. on August 19, 2019.** The full application package must be sealed, addressed, and shipped to:

State of California  
 Department of Community Services and Development  
 Attn: 2019 CalEITC Education and Outreach NOFA  
 2389 Gateway Oaks Drive, Suite 100  
 Sacramento, CA 95833-4246

The following delivery methods are acceptable:

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

## Part C: Evaluation Process

### 1. Scoring

The table below summarizes the available points for the scored documents of the application package. Scores will be assigned per the points identified in the table below.

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

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

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

Applicants are required to provide a detailed narrative in the Application Narrative Template (CSD 171ANT) and Scope of Work (CSD 171) to address the following proposal elements:

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. **With preference points, the maximum number of possible points is 110.**

Applicants must receive a final total score of at least 70 points, not including preference points, to be placed into the rank order to be considered for funding.

The Evaluation Team will use a consensus scoring methodology, where one score is awarded per the team’s collective assessment. Applications will be scored against 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 2 (Los Angeles County) applicants will be ranked against only Target Area 2 (Los Angeles County) applicants. The scores from each subsection will be combined to determine the applicant’s total score.

3. Application Narrative Template

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

Resources sections detailed below.

### Experience Conducting Education and Outreach Activities (20 Points)

Present a detailed description of the applicant's:

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

### Organizational Capacity (25 Points)

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

- a) The geographic area(s) to be targeted, including:
  - County
  - ZIP code
  - City/neighborhood (if available)
  - Rural or urban
  - Other identifying targeting information
- b) The service delivery strategy to be used to deliver education and outreach activities. Emphasis should be given to those strategies with the greatest amount of person to person and targeted interventions. Targeted interventions, for example, may include grantees collaborating with public agencies and community-based organizations (CBO) to reach eligible individuals and families receiving public benefits such as CalWORKs, CalFresh, or Medi-Cal.
- c) Why the type(s) of outreach chosen is/are determined to be the most effective method for reaching the proposed area/population to be served.
- d) Efforts to ensure proposed education and outreach activities are reaching:
  - Californians who have never claimed the EITC, regardless of whether filed taxes previously.
  - Individuals and families whose low income does not require them to file a tax

return

- Families with children age six and younger
  - Workers with incomes up to \$30,000
  - Seniors ages 65 and older
  - Young adults ages 18-24
  - Self-employed workers
  - 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 the self-employed, individuals 18 to 24 years, and individuals over 65 years.
- 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.
- g) Describe how data will be collected to ensure accurate and timely submission of outcomes and expenditures.

#### Trusted Community Partners and Leveraging Resources (10 Points)

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

In the table indicate:

- Name(s) and location(s) of community partner(s) to be engaged
- Purpose of the community partner
- Description of how the partner will help the applicant achieve the projected outcomes identified in the Scope of Work (CSD 171)
- Efforts involving coordinating with public benefits agencies as well as public and private faith-based school, social services program, veteran, and disability entities

#### 4. Preference Points (10 Points)

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

##### Past Activities Conducting EITC Education and Outreach (5 Points)

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

##### Languages Other Than English and Spanish (5 Points)

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

#### 5. Scope of Work

A total of 45 points is possible for the Scope of Work (CSD 171). Activities must have measurable and pragmatic outcomes for which the applicant's organization or entity can reliably collect and validate.

Applicants must include:

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

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



## Part D: Contract Award Process

### 1. Contract Award Information

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

### 2. Appeal Process

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

### 3. CSD Reservations

CSD reserves the right to:

- Modify, amend, cancel, or terminate this NOFA at any time by issuance of an addendum or notice;
- Not make any awards pursuant to this NOFA;
- Make an award under the NOFA in whole or in part;
- Disqualify any applicant whose application fails to conform to the requirements of this NOFA; and
- Change any of the scheduled dates in the Projected Timeline with notice.

### 4. Public Records Act

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

-- END NOFA --