State of California

DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT

CalEITC+ Education & Outreach Application Narrative Template

CSD 171ANT (Rev. 9/2021)

**2021 CalEITC+ Education & Outreach Grant  
Application Narrative Template**

## EXPERIENCE CONDUCTING EDUCATION & OUTREACH ACTIVITIES

**NOTE: 20 Page maximum limit begins from this page forward**

Use this section to present a detailed description of your organization’s experience.

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| **Applicant Must Include the Following:** |
| 1. 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. |
| 1. Operational readiness and expertise in conducting, budgeting, and implementing similar scale outreach and free tax preparation assistance activities. |

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| **Enter narrative response here:** *Delete this text and type narrative (Text box will expand as narrative is entered)* |

**ORGANIZATIONAL CAPACITY**

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| **Applicant Must Include the Following:** |
| Provide a detailed narrative to complement applicant’s Workplan (CSD 171) that describes:   1. The geographic area(s) to be targeted, including:  * County * City/neighborhood (if available) * Rural or urban * Other identifying targeting information |
| 1. 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 to reach eligible individuals and families receiving public benefits such as CalWORKs, CalFresh, or MediCal. |
| 1. 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. |
| 1. Efforts to ensure proposed education and outreach activities reach:  * Californians who are eligible or have never claimed the CalEITC, regardless of whether they’ve filed taxes previously, including noncitizen workers who file using an Individual Taxpayer Identification Number (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. |
| 1. 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 workers who file using an ITIN or who may be eligible for an ITIN. |
| 1. 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). |
| 1. Describe how data will be collected to ensure accurate and timely submission of outcomes and expenditures. |

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**TRUSTED COMMUNITY PARTNERS AND LEVERAGING RESOURCES**

Use this table to present detailed information on trusted community partners to be leveraged who will help deliver successful education and outreach activities. 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. Rows may be expanded and/or added/deleted as necessary.

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| **Required Content:** |
| * Names and location 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 benefits agencies as well as public and private faith-based school, social services program, veteran, and disability entities. |

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| # | Community Partner Name and Location | Organization’s Purpose | Description of how Partner will Help |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
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## FREE TAX PREPARATION ASSISTANCE SERVICES

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| **Applicant Must Include the Following:** |
| Provide a detailed narrative to complement applicant’s Workplan (CSD 171) that describes:   1. Your organization’s plan to expand free tax preparation services in your area. Be sure to address your efforts to offer new or expanded free tax preparation assistance, for example, extended site offerings, extended hours of operation, expanded online services, and increased staffing. |
| 1. 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. |

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**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*. 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.

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| **Applicant Must Include the Following:** |
| Provide a detailed narrative to complement applicant’s Workplan (CSD 171) that describes:   1. Your organization’s 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. |
| **Enter narrative response here:** *Delete this text and type narrative (Text box will expand as narrative is entered)* |