



## **Golden State Opportunity**

Request for Proposals

Community Connect Program 2024

### **I. Background and History**

#### Program History

The California Earned Income Tax Credit (CalEITC), a tax credit for low-income working Californians, was first offered for the 2015 tax year. Currently, the CalEITC is available to individuals who file their taxes, are age 18 or older, and have an annual Adjusted Gross Income (AGI) of \$30,000 or less.

Since 2016, Golden State Opportunity (GSO) has been awarded state funding for education and outreach around the CalEITC. The funding supports increased awareness and uptake of the credit for low-income individuals and families. In addition to supporting CalEITC awareness and uptake, the program also requires raising awareness of the Young Child Tax Credit (YCTC), the Federal Earned Income Tax Credit (EITC), and the Federal Child Tax Credit (CTC). GSO increases said awareness by supporting Free Tax Preparation Assistance (FTPA) sites as well as community partners that support individuals and families to apply for Individual Taxpayer Identification Number (ITIN). Many people who qualify for the CalEITC can also claim the YCTC, EITC, and CTC.

#### About Golden State Opportunity

Golden State Opportunity (GSO) is a nonprofit dedicated to ending poverty by providing all Californians with the tools to build financial well-being and thrive. It is led by doers who educate, engage, and empower working families.

GSO develops and leads comprehensive statewide outreach campaigns to increase awareness of and participation in programs benefiting low-income workers and their families. Our groundbreaking, culturally relevant work in thirteen languages reaches millions of low-income Californians and connects them with the financial resources they need to survive and then thrive.

### **II. Program Description**

GSO specializes in outreach to communities, especially those who are often missed by traditional government outreach efforts. To reach these communities, GSO partners with trusted organizations who are deeply connected to the communities they serve and provides them outreach support including development of collateral materials (e.g. flyers, handouts, social media tools), staff training, event support and translation services. The efforts of these partners



are supplemented by a robust, culturally and linguistically appropriate media outreach program that includes digital, television and radio advertising.

The centerpiece of the program is the CalEITC4me program which includes Free Tax Preparation Assistance (FTPA) and Individual Taxpayer Identification Number (ITIN) outreach for the following:

- California Earned Income Tax Credit (CalEITC);
- California Young Child Tax Credit (YCTC);
- Federal Earned Income Tax Credit (EITC); and
- Federal Child Tax Credit (CTC);
- other programs, such as Golden State Stimulus or Economic Impact Payments as needed.

The remainder of the program year supports other outreach efforts to connect low-income individuals with resources including financial well-being services. Applicants may seek support for existing work that meets this requirement. Additionally, applicants may be called upon to engage in emergency outreach, as was necessary around the Golden State Stimulus in 2021 and Tax Deadline Extension of October 2023.

**Length of Grant Term:** 12 months, December 1st - November 30th

**Grant Amount:** Most awards will vary between \$5,000 and \$75,000.

#### Program Goals

- Increase the number of eligible Californians claiming the available tax credit(s) by providing information to raise awareness of the CalEITC, YCTC, Federal EITC and Federal Child Tax Credit.
- Increase awareness of free tax preparation services, provide access to, and increase the number of eligible low-income California individuals and families who utilize these services.
- Increase awareness of and access to ITIN eligibility and application assistance.
- Provide information, referrals, and support to low-income households to claim tax credits and access other financial support.

For more information on GSO and our work in the anti-poverty field please visit our website [GoldenStateOpportunity.org](http://GoldenStateOpportunity.org).

For more information, resources, and outreach materials regarding the CalEITC program, please visit [CalEITC4Me.org](http://CalEITC4Me.org), a website created, continually updated, and maintained by GSO. This website will be a large part of your outreach efforts as it provides numerous resources such



as the CalEITC calculator, FAQ's, updates to newly implemented programs, as well social media toolkits, flyers in multiple languages, and a VITA site locator.

### **III. Selection Criteria**

#### Minimum Qualifications

- Have experience in developing and implementing tailored outreach and education for low-income, under-resources communities, including communities of color historically underserved by government
- Be tax-exempt under section 501(c)(3) of the Internal Revenue Code and able to provide an IRS determination letter.
- Serve low-income communities statewide (i.e. <\$57,000), in Rural Counties California, or in one or more of the following counties: Los Angeles, Riverside, San Bernardino, Santa Barbara/Ventura.
- Understanding of the California Earned Income Tax Credits and the CalEITC4Me program.
- Has experience and/or interest in Education and Outreach, Free Tax Preparation Assistance (and/or VITA sites) and/or serving Immigrant Communities through ITIN services.
- Certification Compliance

#### Preferred Qualifications

- Prior Experience as a Contractor or Subcontractor under a contract with the State of California, including understanding of pass-through contractual requirements.
- Role as a community hub (i.e. libraries, community center, hospital, church, school, day care, etc.)
- Has experience and/or interest in community-based advocacy work.
- Experience in collecting and measuring data for impact and success in applicant's community
- Supports and serves foster youth, young adults and/or seniors in their local communities
- Has experience in providing community support and resources such as CalFresh, financial wellness training, etc.
- Demonstrated success and track record promoting and increasing use of cash-based assistance programs like CalEITC, free tax services, and other financial/economic security programs.



Rural counties are defined as:

|           |           |            |
|-----------|-----------|------------|
| Alpine    | Kings     | San Benito |
| Amador    | Lake      | Sierra     |
| Butte     | Lassen    | Siskiyou   |
| Calaveras | Madera    | Sutter     |
| Colusa    | Mariposa  | Tehama     |
| Del Norte | Mendocino | Trinity    |
| El Dorado | Modoc     | Tuolumne   |
| Glenn     | Mono      | Yuba       |
| Humboldt  | Nevada    |            |
| Inyo      | Plumas    |            |

#### **IV. Program Expectations**

Applicants must:

- Participate in the Program Year Kick-Off December 2023.
- Participate in 3-4 training/update sessions including Advocacy Training
- Participate in GSO's Community Action Day
- Participate in on-site Storytelling training and potential media events or asks
- Coordinate strategy with GSO and other CalEITC coalition partners.
- Track activities and provide monthly reports.
- Identify and share with GSO the contact information of at least six personal stories. These personal stories, often called testimonials, should be of people who have benefitted from or seen the impact of cashback tax credits like the CalEITC
- Use social media posts and images, emails, etc. written and designed by GSO to amplify the message about claiming tax credits.
- Accept electronic payments.
- Participate in a post-selection process to finalize the award and sign the agreement.

#### **V. Application Details**

Please use the application web form: <https://forms.gle/DHAJWp2LPZLHa6NGA>

All questions are included in the application.

Note: Responses have a 3,000 character limit, including spaces. Applicants interested in serving multiple regions must submit a separate application per region.

#### **Application Required Documents**

Required documents include:

- [Application](#)



- Items to be emailed to [Programs@goldenstateopportunity.org](mailto:Programs@goldenstateopportunity.org):
  - IRS Determination Letter

Application Timeline

|                     |                                       |
|---------------------|---------------------------------------|
| November 2nd , 2023 | RFP Released                          |
| December 1st, 2023  | Proposals Due                         |
| December 8th 2023   | Award Notification                    |
| December 15th-30th  | Awards Finalized and Contract Signing |

**VI. Contact**

For any questions, please contact [Programs@GoldenStateOpportunity.org](mailto:Programs@GoldenStateOpportunity.org)

**VII. Award and Reservation of Rights**

The selection of the award recipients will be based on our sole determination of the most responsive proposals. Award amounts are at the discretion of GSO and responsive to the scale and comprehensiveness of programs delivered. The awarded organizations will be required to execute a contract with GSO that will include compliance with the contract between GSO and the State. We reserve the right to modify or cancel (in whole or in part) this RFP at any time prior to contract award. We reserve the right to reject any and all non-responsive bids submitted, as well as to waive informalities or irregularities in any bids received.

**VIII. Protest**

Prior to the Proposal due date, bidders shall have the opportunity to take exception to specifications and/or requirements set forth herein. Protests of requirements received after the Proposal due date shall be considered untimely and rejected. GSO management shall review the merits and timeliness of the protest and submit a decision in writing within a reasonable period of time following receipt of the protest. GSO's decision is final.