

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: INFO LINE of San Diego County		Contract Number: 18T-8004	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Brian Nolan / Director of Operations	E-mail Address: nolan@211sandiego.org		Telephone: 858-300-1290	Fax Number: 858-300-1301

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	135.43
2.	Social Media	145.85
3.	Canvassing	4,326.01
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	432.30
7.	Other 1	.00
8.	Other 2	.00
	Total	5,039.59

20 - TOTAL COSTS

1.	Total Costs	5,039.59
	Total	5,039.59

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Paul Redfern / CFO/COO	Signature:	Date: 12/19/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report	
Grantee Organization Name	Infoline of San Diego	
Grantee Representative	Leticia Martinez	
Telephone Number	858-300-1221	
Email Address	lmartinez@211sandiego.org	
Contract Number		
Target Area	2-San Diego	
Reporting Period	October 15, 2018 - November 30, 2018	
Web		
	Category	Metrics
	EITC Website Hits	992
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>In October, our 2-1-1 San Diego home page was updated with a rotating banner regarding CalEITC, with a link to more information. That link re-directs visitors to a webpage with information regarding the upcoming tax season, free VITA appointments, income guidelines and the tax credits available, with a stronger focus on CalEITC and the expanded eligibility criteria. In addition, our subcontractors/partners are highlighted towards the bottom of the page. In October and November, there were 992 unique web visits based on Google Analytics.</p> <p>2-1-1 San Diego home page: https://211sandiego.org/</p> <p>Dedictaed CalEITC web page: https://211sandiego.org/resources/basic-needs/financial-assistance-tax-information/</p> <p>Website Development: 3.25 hours x \$41.67 per hour = \$135.43</p>		
<p>2) Provide a narrative of education and outreach activities conducted during the month under web:</p> <p>The 2-1-1 tax information page provides CalEITC eligibility information, highlighting older adults ages 65 and above, as well as those ages 18-24, and EITC eligibility. The webpage re-directs those interested in CalEITC and free VITA tax preparation to call 2-1-1.</p>		
<p>3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:</p> <p>N/A</p>		

Target Area	2-San Diego		
Reporting Period	October 15, 2018 - November 30, 2018		
Social Media			
Number of Facebook Posts	4	Number of Tweets	3
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
CalEITC is a cash back tax credit that puts money back into the pockets of California's working families and individuals. Call 2-1-1 to learn more about		The holiday season is upon us and tax season is also right around the corner...are you ready? Learn about available tax credits at the 2-1-1 website: #EITC #CalEITC #ItsYourMoneyGetIt	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>In the month of October and November, there were a total of 4 Facebook posts, and 3 Twitter posts published. There were a total of 1,668 Facebook reaches, and 1,307 Twitter impressions.</p> <p>Social Media costs: 7 posts = 3.50 hours x \$41.67 per hour = \$145.85</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>The focus of October posts was to educate clients about how they can use 2-1-1 to learn more about the tax credits available and the eligibility guidelines, in addition to our partnership with Dreams for Change, ElderHelp, IRC, CDA, and YMCA.</p> <p>The focus of the November posts was to educate clients about how they can use 2-1-1 to learn more about the tax credits available, the eligibility guidelines, and the benefits of those credits.</p> <p>Since we regularly acquire new partners who serve our community, and since our social media presence is growing, we find it very valuable to create a sense of excitement for new and existing clients to encourage people to visit our website or to call us and learn more about the free services available.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p> <p>In November, we posted a link to our holiday assistance programs which helped 2-1-1 obtain new followers, and boosted our viewership of other social media posts.</p>			

Target Area	2-San Diego	
Reporting Period	October 15, 2018 - November 30, 2018	
Canvassing		
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	0
	Canvassing in Non-Targeted Zip Codes	0
	New Individuals Who Received Text Messages	0
	Phone Calls	4
	Office Visits	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>2-1-1 San Diego Community Connectors received CalEITC, and EITC Outreach & Education training in the Month of November. Our Vice President of Organizational Development worked with the Client Service Manager to develop training curriculum to facilitate individual and ongoing learning. Education and Outreach activities began immediately after.</p> <p>ElderHelp took part in a tailored training session with 2-1-1 San Diego to learn how to incorporate CalEITC canvassing activities into their workflow.</p> <p>2-1-1 San Diego phone calls: 4 inbound calls = 0.40 hours x \$24.30 per hour = \$9.72</p> <p>2-1-1 San Diego contact center management:</p> <p style="padding-left: 40px;">Service Delivery Manager: 16 hours x \$41.25/hr = \$660.48</p> <p style="padding-left: 40px;">Program Assistants: 24.83 hours x \$25.50/hr = \$633.17</p> <p style="padding-left: 40px;">Director of Enrollment & Navigation Services: 16 hours x \$53.54/hr = \$856.64</p> <p>2-1-1 San Diego training:</p> <p style="padding-left: 40px;">Community Connectors: 60 hours x \$24.30/hr = \$1,458.00</p> <p style="padding-left: 40px;">Training Specialist: 20 hours x \$27.00/hr = \$540.00</p> <p>ElderHelp training: 7 hours of training x \$24.00 per hour = \$168.00</p> <p>2) Provide broad overview of canvassing for targeted zip codes: N/A</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: N/A</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent:</p> <p>Text messaging activity is scheduled to begin in January 2019, once VITA appointments are</p>		

Target Area	2-San Diego
Reporting Period	October 15, 2018 - November 30, 2018
<p>available.</p> <p>5) Provide broad overview of Phone Calls conducted:</p> <p>Of the 4 phone calls resulting in CalEITC Outreach & Education, none were from the targeted zip codes. However, we expect that will change going forward.</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:</p> <p>2-1-1 San Diego held the CalEITC Contract Kick-Off meeting with all of the subcontractors in October, to educate the organizations on specific contract requirements, important timelines, future trainings and discuss invoicing and reporting expectations. Additionally, 2-1-1 San Diego provided custom templates to the subcontractors for ease of reporting and tracking progress towards goals.</p>	

Target Area	2-San Diego
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

N/A

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

N/A

4) Indicate any leveraging of other resources conducted this month in regards to media:

N/A

Target Area	2-San Diego	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	0
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>2-1-1 San Diego and subcontractors will distribute flyers once received.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>N/A</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>N/A</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources:</p> <p>N/A</p>		

Target Area	2-San Diego
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
School	91911	10/20/18	40	No
School	92111	10/24/18	150	No
School	92115	11/13/18	200	No
Educational Forum	92084	11/13/18	20	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

2-1-1 San Diego attended a total of 4 outreach events during the months of October & November 2018, reaching 410 individuals.

Community Booths:
 Outreach Staff: 15 hours x \$24.30 per hour = \$364.50
 Mileage: 124.4 miles x \$0.545 per mile = \$67.80

2) Provide a brief overview of events conducted during the reporting period:

2-1-1 San Diego attended the following events and provided CalEITC brochures, outreach & education to participants:

10/20/2018 - Grandparents raising Grandchildren (40 attendees)
 10/24/2018 - SD Grats Roots Health Fair (150 attendees)
 11/13/2018 - Hunger & Homelessness Awareness Resource Fair (200 attendees)
 11/13/2018 - Alliance for Regional Solutions (20 attendees)

3) If members of the press attended an event, indicate which press outlets: N/A

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

N/A

Target Area	2-San Diego
Reporting Period	October 15, 2018 - November 30, 2018
Other: Automated Recording	
Category	Actual (#)
Recording Played to Callers	0
Narrative of Expenditures in EARS and Outreach Activities	
Automated recording is expected to begin in January 2019.	

Target Area	2-San Diego
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>The biggest challenge for October and November 2018 was to increase staffing levels, which impacted the delivery of training. To address this, 2-1-1 San Diego created an e-learning to facilitate individual learning and paired it with a follow-up session with the agent's supervisor to address questions. While this addressed the delivery of information, developing the curriculum delayed the timeframe in which it could be delivered. We have since completed onboarding for a group of recently hired Community Connectors to increase our quantity of trained staff.</p>	
Narrative of Success Stories	
<p>Success Story #1 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #2 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #3 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: INFO LINE of San Diego County		Contract Number: 18T-8004	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Brian Nolan / Director of Operations	E-mail Address: nolan@211sandiego.org		Telephone: 858-300-1290	Fax Number: 858-300-1301

10 - EDUCATION AND OUTREACH ACTIVITIES		
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2.	Social Media	145.85
3.	Canvassing	4,326.01
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7.	Other 1	.00
8.	Other 2	.00
	Total	5,039.59
20 - TOTAL COSTS		
1.	Total Costs	5,039.59
	Total	5,039.59

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Paul Redfern / CFO/COO	Signature:	Date: 12/19/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Amador-Tuolumne CAA		Contract Number: 18T-8016	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Alison McElwee / Fiscal Services Coordinator	E-mail Address: amcelwee@atcaa.org		Telephone: 209-223-1485	Fax Number: 209-223-4178

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	689.11
2.	Social Media	536.16
3.	Canvassing	205.44
4.	Media	1,454.86
5.	Collateral Messaging	1,667.28
6.	Group Events	985.91
7.	Other 1	485.77
8.	Other 2	3,404.94
	Total	9,429.47

20 - TOTAL COSTS

1.	Total Costs	9,429.47
	Total	9,429.47

CONTRACTOR'S CERTIFICATION

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Authorized Person (Print Name/Title): Bruce Giudici / Fiscal Officer	Signature:	Date: 12/21/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
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Approved By:	Date:
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2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Amador Tuolumne Community Action Agency
Grantee Representative	Kristy Moore
Telephone Number	209-283-4130
Email Address	kmoore@atcaa.org
Contract Number	18T-8016
Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Unlock and pay hosting fees for mycaleitc.org website: \$348.00,
 Occupancy costs for web research/design staff/office: \$83.45,
 Web content design staff costs: \$128.83,
 Web partnering research staff + securing staff: \$128.83,
 Total: \$689.11

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 Secured staffing for the CalEITC season. Began comping data on current and potential partners with websites of whom they may share our information about CalEITC. Began messaging development including web banners and block ads that could easily post to partner sites. Unlocked mycaleitc.org site by reestablishing fees/hosting so that it can be updated to 2018 expansion. Of note: mycaleitc.org is a landing page that directs folks to caleitc4me.org site. It was created to get web visitors that reside outside of ATCAA's service area. in addition, ATCAA will create a page an EITC dedicated page on it's own site for visitors in our service area.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: None

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	6	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
See below.*			
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Social media video development: \$129.74,
 Occupancy costs for social media staffing: \$67.93,
 Secure staffing and begin development of social media calendar and messaging: \$338.49,
 Total: \$536.16

2) Provide a narrative of education and outreach activities conducted during the month under social media: Secured bilingual staffing for social media outreach. Updated mycaleic FB page and created a mycaleitc Instagram page. Worked on social media messaging, calendars and began researching various ways to get posted into group discussion boards. Began to look at ways/costs to produce a variety of videos to post to all platforms.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: Met with Golden One Opportunity to discuss messaging strategies as we are both covering the rural counties. Discussed messaging strategies with other grantees and to members of the SIT Workgroup.

*Did you earn less than \$22,500 this year in employee or self-employment wages? You might qualify for another check refund when you file your taxes! Go to <https://www.mycaleitc.org> to see if you're eligible for the [#CalEITC#ItsYourMoneyGetIt](#)

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	27

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Bilingual outreach staffing for canvassing secured and trained: \$153.32,
 Mileage for outreach staff for meetings/training: \$17.77,
 Occupancy costs for outreach staff: \$34.35,
 Total: \$205.44

2) Provide broad overview of canvassing for targeted zip codes: Outreach staffing began to look for target areas that may be of worthwhile to canvass in. For a rural grant covering 27 counties, regional canvassing will be extremely limited. Staff is looking into partner organizations who can provide this effort within their service areas.

3) Provide a broad overview of canvassing for non-targeted zip codes: Canvassing in ATCAA's service area will be limited to known areas of latino and impoverished communities who may not otherwise receive messaging.

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A. ATCAA will not be text messaging in rural counties as Golden One Opportunity will be handling.

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: Head Start and Promotores programs are being sought and many have already agreed to help distribute informaton. We are working on a training session to educate community partners about CalEITC.

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Media ad/messaging design and placement staff: \$1040.18,
 Bilingual media ad design/messaging and placement staff: \$253.48
 Occupancy costs for Media staffing: \$161.20
 Total: \$1454.86

- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A. No ads run during this period.

- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A. No ads run during this period.

- 4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	700
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Copying charges: \$5.33,
 Mileage related to staff travel for training/meeting/collaboration: \$312.55,
 Office supplies, \$2.47,
 Occupancy costs relating to Collateral Messaging staff: \$182.91,
 Securing bilingual staffing and creating messaging materials: \$837.10,
 Bilingual messaging materials: \$326.92
 Total: 1667.28

2) Provide a broad overview of flyer/brochure and poster distribution: FTB materials we not available as of this reporting period, but in-house messaging was distributed to key partners and in key areas about the upcoming expanded CalEITC, that people could file now on own from last year and that we needed volunteers to help distribute messaging.

3) Provide a listing and narrative of direct mailers that went out: N/A.

4) Any other additional information pertinent to work conducted including leveraging of other resources: Began research and identification of collateral messaging targets, types and amounts of materials needed.

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Canvass to Businesses	
Cavass to Regional Partners	

Narrative of Expenditures in EARS and Outreach Activities

OTHER 1- CANVASS TO REGIONAL BUSINESSES. Supplies and equipment needed to secure business and organization partnerships: \$96.72,
Occupancy costs for staffing: \$62.80,
Staffing needed to research, develop and maintain business and partner lists, communicate and strategize needs including data collecting methods: \$326.25,
Total OTHER 1 : \$485.77

OTHER 2 - CANVASSING TO REGIONAL PARTNERS. Communications equipment: \$121.87,
Laptop, monitors, docking stations, etc. : \$1753.06,
Occupancy costs for canvassing support staff: \$359.16,
Canvassing support, research data collection staff, \$663.85,
Bilingual research and canvassing support staff, \$506.99
Total OTHER 2: \$3404.94

Secured recording, research, bilingual and project management staff. Began to build on 2017 business and regional partner lists. Began to develop data collecting and reporting methods. Began planning outreach tours and areas to target personally and via email or telephone. Of note: In 2017, we found that reaching out to potential partners outside ATCAA service area was difficult unless in person as the level of distrust, even among organizations is high. We've developed "tours" to targeted areas to enhance our partnerships by beginning the dialogue in person. Began looking into best practices for data-collecting through our partnerships for FTB requirements.

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

How to collect the FTB required data as a rural grantee outside of our outreach area that does not require 1-1 canvassing, but FTB required 1-1 info gathering.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Amador-Tuolumne CAA		Contract Number: 18T-8016	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Alison McElwee / Fiscal Services Coordinator	E-mail Address: amcelwee@atcaa.org		Telephone: 209-223-1485	Fax Number: 209-223-4178

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	689.11
2.	Social Media	536.16
3.	Canvassing	205.44
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Authorized Person (Print Name/Title): Bruce Giudici / Fiscal Officer	Signature:	Date: 12/21/2018
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Payment:	PCA#
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Approved By:	Date:
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2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAC of Santa Barbara County		Contract Number: 18T-8014	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kemba Lawrence / Director Energy Services	E-mail Address: klawrence@cacsb.com		Telephone: 805-964-8857 X1	Fax Number: 805-964-6798

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	.00
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	Total	.00

20 - TOTAL COSTS

1.	Total Costs	.00
	Total	.00

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Authorized Person (Print Name/Title): K Adornetto / cfo	Signature:	Date: 01/04/2019
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Payment:	PCA#
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Approved By:	Date:
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State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	Community Action Commission of Santa Barbara County
Grantee Representative	Kemba Lawrence
Telephone Number	805-964-8857 ext 1145
Email Address	klawrence@cacsb.com
Contract Number	
Target Area	
Reporting Period	October 15, 2018 - November 30, 2018

Web

Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
N/A

2) Provide a narrative of education and outreach activities conducted during the month under web:

Staff person created a running banner on home page of CAVC website: www.ca-vc.org which links to the 211 page on EITC. Created a tracking system to measure Website hits.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N/A

Target Area			
Reporting Period		October 15, 2018 - November 30, 2018	
Social Media			
Number of Facebook Posts	23	Number of Tweets	20
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
#BeCommunityAction #CalEITC4Me #EmpoweringWomen CAVC Present at the Building a Pathway To Financial Stability: Educating and Empowering Low-Income Women Summit!		“The EITC is a way to lift low in-income families out of poverty, and yet in California alone 2 Billion is left on the table every year because eligible families aren’t claiming it.” #BeCommunityAction #EITC #CalEITC4Me #MyMoney	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Two staff members working to compile content for EITC posts, scheduling posts on Facebook and Twitter. Combining content (text) with images or links.</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>Made posts on EITC, explaining what it is and encouraging people to check and see if they may be eligible. Giving examples of who may benefit from this program.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A</p>			

Target Area	
Reporting Period	October 15, 2018 - November 30, 2018
Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>1) List the various activity-expenditures charging for this month and their cost: N/A</p> <p>2) Provide broad overview of canvassing for targeted zip codes: N/A</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: N/A</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A</p> <p>5) Provide broad overview of Phone Calls conducted: N/A</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:</p> <p>Staff collecting data for future canvassing (zip codes & contact information)</p>	

Target Area	
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: N/A

- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

- 4) Indicate any leveraging of other resources conducted this month in regards to media:
N/A

Target Area		
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	0
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: N/A</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: N/A</p> <p>3) Provide a listing and narrative of direct mailers that went out: N/A</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: Identified zipcodes for mailer and negotiated cost for printing and mailing with Jano printing</p>		

Target Area	
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<input style="width: 100%; height: 20px;" type="text"/>	

Target Area	
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>Awaiting update of the EITC website (current calculator). Loss of outreach contractor.</p>	
Narrative of Success Stories	
<p>Success Story #1 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #2 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #3 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable):</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAC of Santa Barbara County		Contract Number: 18T-8014	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kemba Lawrence / Director Energy Services	E-mail Address: klawrence@cacsb.com		Telephone: 805-964-8857 X1	Fax Number: 805-964-6798

10 - EDUCATION AND OUTREACH ACTIVITIES		
1.	Web	.00
2.	Social Media	.00
3.	Canvassing	.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	.00
8.	Other 2	.00
	Total	.00
20 - TOTAL COSTS		
1.	Total Costs	.00
	Total	.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): K Adornetto / cfo	Signature:	Date: 01/04/2019
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 10/15/18 - 11/30/18	Adjustment: 1
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		553.31	
2.	Social Media		553.31	
3.	Canvassing		4,166.06	
4.	Media		553.31	
5.	Collateral Messaging		2,438.47	
6.	Group Events		1,326.30	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			9,590.76
20 - TOTAL COSTS				
1.	Total Costs			9,590.76
	Total			9,590.76
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 01/23/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 10/15/18 - 11/30/18	Adjustment: 2
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	55.33		
2.	Social Media	55.33		
3.	Canvassing	252.47		
4.	Media	55.33		
5.	Collateral Messaging	243.85		
6.	Group Events	132.63		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	794.94		
20 - TOTAL COSTS				
1.	Total Costs	794.94		
	Total	794.94		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 02/19/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web			.00
2.	Social Media			.00
3.	Canvassing			.00
4.	Media			.00
5.	Collateral Messaging			.00
6.	Group Events			.00
7.	Other 1			.00
8.	Other 2			.00
	Total			.00
20 - TOTAL COSTS				
1.	Total Costs			.00
	Total			.00
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

State of California
 DEPARTMENT OF COMMUNITY SERVICES AND
 DEVELOPMENT
 2018 Cal EITC Grant Progress Report
 CSD 171PR (Rev. 11/18)

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Community Action Partnership of Kern
Grantee Representative	Sandi Truman
Telephone Number	661-834-1724
Email Address	struman@capk.org
Contract Number	18T-8012
Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Expended: \$553.31 for Staff time, travel to Sac meeting, & postage

2) Provide a narrative of education and outreach activities conducted during the month under web:

CAPK: CAPK will maintain a dedicated linked CalEITC website page for Kern County, developed and launched by December 1, 2018. The CalEITC will be linked to CAPK's main page and referenced in all outreach materials. Weekly updates of outreach activities and events attended and planned, with heavier activity in Jan. - April (Tax season).

Tulare: Tulare CSET's marketing team will develop a unique CalEITC webpage with an emphasis on local information and resources. The developed web address will be referenced in all CalEITC printed materials and ads. CSET will use approved educational language to develop the webpage. Resources links will provide access to additional educational resources from the statewide campaign. This webpage is expected to produce strong outcomes; 1,121 unique website visits were made to CSET's energy department page in the month of July 2018 alone. The webpage will be developed in December 2018, go live in January 2019, and run through April 2019.

A meeting between CAPK and Tulare outreach and leadership was held in October and November 2018 to discuss the website design and development.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: Links to CA EITC will assist with branding and information dissemination.

Target Area		10-Kern/Tulare	
Reporting Period		October 15, 2018 - November 30, 2018	
Social Media			
Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: Expended: \$553.31 for Staff time, traveil to Sac meeting, & postage</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media: CAPK: Social media will be used to target eligible tax payers using CAPK created and adopted messaging from state wide grantees. CAPK will use demographic and other collected data to do regional targeting to assure that messages reach eligible targets, and Boosted posts coinciding with events and web page postings. Hootsuite is a social media platform that allows us to schedule social media posts ahead of time though Facebook, Instagram, LinkedIn and Twitter.</p> <p>Tulare: A projected 28 social media posts will reach followers in the Tulare County target area.</p> <p>A meeting between CAPK and Tulare outreach and leadership was held in October and November 2018 to discuss social media campaigns--content, bilingual messaging, etc.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p>			

Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	92
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Expended: \$4166.06 for Staff time, travel to Sac meeting, postage & printing

2) Provide broad overview of canvassing for targeted zip codes:

CAPK: CAPK will conduct canvassing in Kern focusing on zip codes 93304, 06, 07, 08, and 09, all located in the metro Bakersfield area of Kern County.

Staff will conduct face-to-face canvassing at local markets, parks, and neighborhoods.

Canvassing will also be conducted through CAPKs Food Banks Senior Food Program, which distributes to 3,500 seniors each month and other Food bank distributions;

CAPK's Friendship House Community Center located in southeast Bakersfield which includes on-site Mexican Consulate Services; and CAPK's Head Start Centers in the targeted zip codes.

Tulare: The CSET VITA Outreach Team will conduct canvassing to agricultural workers, by visiting local agricultural sites during mandatory safety meetings. Additionally, CSET will work to include a notice regarding VITA/CalEITC education included in paychecks to workers. Business cards with VITA site information in English and Spanish will be distributed to all during the canvassing.

CSET will canvass through phone calls in partnership with Tulare County Health & Human Services Agency (HHSA) operated Alert TC system. This system has been utilized for promoting VITA services and CalEITC in the past. For Tulare County residents who are enrolled in Reverse 911, auto dialer phone calls will be made with messages including information on VITA workshops and requirements, as well as CalEITC information. Messages are provided in both English and Spanish language options. Alert TC phone calls will take place once a month in February, March, and April 2019. These calls will reach 91,000 households in Tulare County.

In-person canvassing will take place during tax season with a projected 500 families engaged. Phone call canvassing will take place February through April 2019, with 91,000 households engaged. Services will be provided throughout Tulare County target area zip codes of 93257, 93291, 93277, 93292, and 93247, as well as across Tulare County's other communities.

A meeting between CAPK and Tulare outreach and leadership was held in October and November 2018

Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018

to discuss canvassing errors.

3) Provide a broad overview of canvassing for non-targeted zip codes:

Staff of CAPK started canvassing neighborhoods in October, after outreach workers were hired and trained.

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

-No activity at this time.

5) Provide broad overview of Phone Calls conducted:

-No activity at this time.

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

Nothing to report at this time.

Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Expended: \$553.31 for Staff time, travel to Sac meeting, & postage

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

CAPK: CAPK will use Spanish and English TV and radio ads, billboards, transit ads, and social media promoted/boosted Ads. CAPK's CD Outreach team will assist in developing messaging that is targeted, effective, and culturally specific. CAPK receives free transit ads from Get Bus and uses press releases to promote programs. For example, from Feb. to April 2018, CAPK VITA and EITC were mentioned more than 156,000 times in local media news stories. Additionally, CAPK will solicit free advertising/media coverage including interviews, event coverage, and PSA's.

Tulare: CSET will use targeted advertisements on social media handles of Facebook, Twitter, and Instagram to provide CalEITC education and resources. By analyzing similar and recent campaigns, CSET's sponsored advertisements are projected to reach over 50,000 people. Advertisements for the CalEITC campaign will include selected demographics and target areas of Tulare County to help emphasize low-income audiences. These advertisements will link directly to CSET's CalEITC webpage. The social media campaign will take place January through April 2019.

CSET will purchase a total of four transit advertisements, each to run for 1 month period, with chosen transit routes to include the Tulare County target area of zip codes 93257, 93291, 93277, 93292, and 93247. A projected 66,000 impressions will be produced by individuals viewing these transit ads.

3) Provide information on whether or not any earned media obtained during the month. For

Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018
<p>each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:</p> <p>No activity at this time.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media:</p> <p>No activity at this time.</p>	

Target Area	10-Kern/Tulare	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	1,159
	Number of New Individuals who Received Direct Mailers	
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: Expended: \$2438.47 for Staff time, traveil to Sac meeting, postage, printing & outreach supplies</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: CAPK: Flyer/brochure distribution: the Outreach Specialist will distribute flyers/brochures during canvassing actives as described above. Additionally, CAPK agency partners that serve possible recipients of CalEITC in the targeted zip codes will also be used to distribute printed information. CAPK will also reserve space at the Valley Plaza Mall to distribute flyers/brochures throughout tax season. Mailers: CAPK VITA will mail out post cards to approx.. 4,000 households . These postcards will include using 211 to schedule appointments, info on CalEITC and Federal EITC, and what to bring for the tax appointment. Newsletters: CAPK will dedicate a section of the CAPK Weekly Reader (e-blasted to over a thousand recipients each week) to promote CalEITC to staff and agencies that serve potential CalEITC recipients. Tulare: Flyers will be distributed to CSET's and Kings Community Action Agency's extensive number of contacts at local businesses, Family HealthCare Network (FHCN) government agencies, community-based organizations (CBOs), churches, and schools, along with civic-minded individuals. Flyers will also be distributed to CSET's eight low-income senior centers across Tulare County. To reach areas of Tulare County that will not likely see CalEITC transit ads or social media ads, CSET will use direct mail to connect with approximately 1,500 households. CSET's marketing team will develop a 'CalEITC' postcard using provided language, and include the web address for CSET's VITA and CalEITC page, and dates and times of VITA workshops scheduled in their communities.</p> <p>3) Provide a listing and narrative of direct mailers that went out: No activity at this time.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources. No additional information at this time.</p>		

Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
School	93307	11/15/18	25	No
School	93280	11/16/18	28	No
School	93305	11/19/18	13	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Expended: \$1,326.30 for Staff time, travel to Sac meeting, & postage

2) Provide a brief overview of events conducted during the reporting period:
CAPK: EITC Awareness event, on EITC Awareness Day. CAPK also helps promote/attends the Kern VITA Partnership's Taco and Taxes events which uses Mobile VITA to connect people to free tax-services.
Tulare: CSET will provide host free tax preparation and filing services for the 2019 tax season through VITA Tulare County every Saturday from February through April 15, totaling 11 workshops per site. CSET's VITA outreach team also plans to participate in applicable community events such as Resource Fairs, health care clinics provided by Family HealthCare Network (of which flyers are referenced in collateral messaging). CSET will host as well as participate in applicable group events during the months of February through April 2019. A projected 66 group events minimum will be attended, covering the Tulare County target area of zip codes 93257, 93291, 93277, 93292, and 93247.

- Visited 3 CAPK Headstart centers during parent meetings to educate them about the changes being made to CAEITC.
- There was a total of 34 English and 32 Spanish brochures distributed.

3) If members of the press attended an event, indicate which press outlets:
 No press attended these events.

4) Any other additional information pertinent to work conducted, including leveraging of other resources:
 Nothing to report at this time.

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web			.00
2.	Social Media			.00
3.	Canvassing			.00
4.	Media			.00
5.	Collateral Messaging			.00
6.	Group Events			.00
7.	Other 1			.00
8.	Other 2			.00
	Total			.00
20 - TOTAL COSTS				
1.	Total Costs			.00
	Total			.00
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 10/15/18 - 11/30/18	Adjustment: 2
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	55.33		
2.	Social Media	55.33		
3.	Canvassing	252.47		
4.	Media	55.33		
5.	Collateral Messaging	243.85		
6.	Group Events	132.63		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	794.94		
20 - TOTAL COSTS				
1.	Total Costs	794.94		
	Total	794.94		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 02/19/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

Target Area	10-Kern/Tulare
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>Many of the neighborhoods canvassed are mostly Hispanic and with the current political environment, some people are reluctant to provide any personally identifying information for the FTB data collection. We are working on strengthening our strategies to reach this population.</p>	
Narrative of Success Stories	
<p>Success Story #1 CAPK will be operating a booth in the Valley Plaza mall, a high traffic area for Bakersfield.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 10/15/18 - 11/30/18	Adjustment: 1
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		553.31	
2.	Social Media		553.31	
3.	Canvassing		4,166.06	
4.	Media		553.31	
5.	Collateral Messaging		2,438.47	
6.	Group Events		1,326.30	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			9,590.76
20 - TOTAL COSTS				
1.	Total Costs			9,590.76
	Total			9,590.76
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:		Date: 01/23/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8002	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	12,750.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	5,000.00
7.	Other 1	.00
8.	Other 2	2,375.00
Total		20,125.00

20 - TOTAL COSTS

1.	Total Costs	20,125.00
	Total	20,125.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8015	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1. Web	.00
2. Social Media	.00
3. Canvassing	1,050.00
4. Media	.00
5. Collateral Messaging	.00
6. Group Events	.00
7. Other 1	625.00
8. Other 2	.00
Total	1,675.00

20 - TOTAL COSTS

1. Total Costs	1,675.00
Total	1,675.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn	Contract Number: 18T-8008	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,560.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	1,000.00
7.	Other 1	.00
8.	Other 2	.00
	Total	6,560.00
20 - TOTAL COSTS		
1.	Total Costs	6,560.00
	Total	6,560.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Josh Fryday / President	Signature:	Date: 12/20/2018
------------------------------------------------------------------	------------	---------------------

CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8017	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES		
1. Web		7,000.00
2. Social Media		.00
3. Canvassing		2,250.00
4. Media		.00
5. Collateral Messaging		5,000.00
6. Group Events		.00
7. Other 1		.00
8. Other 2		3,758.00
Total		18,008.00
20 - TOTAL COSTS		
1. Total Costs		18,008.00
Total		18,008.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	Sebastien@goldenstateopportunity.org
Contract Number	18T-8002
Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

All expenditures for Web conducted through statewide grant.

2) Provide a narrative of education and outreach activities conducted during the month under web:

N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

N/A

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		0	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

There are no funding allocated for social media, CalEITC4Me is conducted through the statewide grant. Although, GSO will promote specific events and VITA locations during tax season.

2) Provide a narrative of education and outreach activities conducted during the month under social media:

N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	30
Canvassing in Non-Targeted Zip Codes	90
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

LA Program Director: \$8,000
 Grassroots Cordinator: \$4,000
 Texting Managment: \$750

2) Provide broad overview of canvassing for targeted zip codes:

On Nov. 5 CalEITC4me participated in partnership with Clinca Romero at the mexican consulate health fair. The mexican consulate held a health resource fair for the surrounding communiites of Central Los Angeles. We were able to inform those in attendance about the Cal EITC as well as direct them to our website to look up the closest location to get their taxes filed for free. **30 1v1 Interactions**

3) Provide a broad overview of canvassing for non-targeted zip codes:

On October 17, 2018 CalEITC4Me conducted an outreach event in Boyle Heights (Zip Code 90033). This event was aA financial planning day and resource fair in the eastside of Los Angeles with various resources including assitance filing your taxes, ITIN applications and FAFSA Applications. The event included workshops on various topics including savings account, buget planning, Fraud Prevention. We did outreach in the neighboring communities to inform the community about the event itself and outreach about the Cal EITC to all the attendees present. **75 1v1 interactions**

On Nov. 9, 2018. CalEITC4Me We hosted our final meeting for our partners in 2018 and informed them about the new changes for 2019 tax season. **15 1v1 interactions**

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

No texts have been sent out during the reporting period. Costs for texting management includes creating a plan to ensure all texts can go out by June 30. This includes working with partners to find volunteers, and looking to hire part-time texters

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
(Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report for Oct 15-Nov. Facebook Ads to begin running in January as Tax season starts and W-2's are starting to be sent out.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

GSO will be working with Signified Media Group for the Digital program that will include ads on Facebook, Instagram, and other social media outlets such as snapchat and Youtube. Signified will also create video content to be used for the advertisements. We have had initial meetings with Signified and they are working on the digital plan, and messaging to be used in Ads.

In Los Angeles, there will be a large focus on self-employed and spanish workers.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	44,300
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

There are no expenses for collateral messaging during the reporting period. The collateral pieces that were distributed were ordered over the summer and did not utilize state funds.

2) Provide a broad overview of flyer/brochure and poster distribution:

44,300 collateral pieces distributed to the partners below. Flyers included the benefits wheel, benefits checklist, self-employed flyer, and financial literacy flyer

- Eastmont Community Center - 3,430 pieces
- East LA Community Corporation - 3,430 pieces
- Mexican American Opportunity Foundation (MAOF) - 3,430 pieces
- Watts Labor Community Action Committee (WLCAC) - 3,430 pieces
- Clinica Mon Senor Romero - 3,430 pieces
- Central City Neighborhood Partners - 3,430 pieces
- Barrio Action Youth & Family Center - 3,430 pieces
- Antelope Valley Partners for Health - 3,430 pieces
- Toberman Neighborhood Center - 3,430 pieces
- El Monte Promise Foundation - 3,430 pieces
- Womens Summit Distribution - 10,000

3) Provide a listing and narrative of direct mailers that went out:

N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			16	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	90033	10/17/18	75	No
Educational Forum	90033	10/22/18	15	No
Educational Forum	90033	10/23/18	15	No
Community Gathering	90280	10/25/18	200	No
Resource Fair	90017	10/27/18	150	No
Health Care Clinic	90057	11/05/18	30	No
Community Gathering	90033	11/09/18	15	No
Resource Fair	90032	11/10/18	50	No
Resource Fair	90012	11/17/18	50	No
Resource Fair	90033	11/20/18	50	No
Community Gathering	90033	11/21/18	50	No
Resource Fair	90013	11/29/18	40	No
Educational Forum	90033	11/29/18	50	No
Community Gathering	3/18/2151	11/14/2018	15	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Event Management: \$5,000

2) Provide a brief overview of events conducted during the reporting period:

CalEITC4Me community gathering- A financial planning day and resource fair in the eastside of Los Angeles with various resources including assistance filing your taxes, ITIN applications and FAFSA Applications. The event included workshops on various topics including savings account, budget planning, Fraud Prevention. We did outreach in the neighboring communities to inform the community about the event itself and outreach about the Cal EITC to all the attendees present.

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
<p>Financial Education Resource Fair with ELACC - ELACC hosts Financial Education workshops for those interested in joining their financial coaching program. At these workshops we do outreach on what programs are available to the families to provide financial assistance</p> <p>Women's Economic Empowerment Summit - We hosted our first Women's Empowerment Summit in partnership with Chase for case managers and service providers who work directly with low income families to provide them with tools that could be beneficial to their clients/community. The Summit included a series of panels that focused on what challenges & resources are available to help uplift women out of poverty. At this summit we debuted 3 new materials in 2 different languages and were able to distribute to attendees.</p> <p>Health and Resource Fair with Central City Neighborhood Partners - Health Resource Fair for low income families in the Pico Union/ Westlake area of Los Angeles. Cal EITC eligibility flyers were handed out to every single attendee as well as a both with all of our other materials on display.</p> <p>Mexican Consulate Health Fair with Clinica Romero - The mexican consulate held a health resource fair for the surrounding communiites of Central Los Angeles. We were able to inform those in attendance about the Cal EITC as well as direct them to our website to look up the closest location to get their taxes filed for free.</p> <p>2018 Final Partner Convening - We hosted our final meeting for our partners in 2018 and informed them about the new changes for 2019 tax season.</p> <p>Resource and outreach event with ELACC - Outreach event at Subsidized housing. Distributed Cal EITC collateral to tenants as they are most likely eligibile given income requirements for housing.</p> <p>LAUSD 5k Move it Fair - Participated in Resource fair for LAUSD 5k move it Fair. We were able to inform parents of Cal EITC and other benefits they could be eligible for.</p> <p>Festival de Santa Cecillia - Outreach event at the Festival of St. Cecilia- we were able to inform those in attendance about the Cal EITC from our resource booth.</p> <p>Mobile Food Pantry - Once a month ELACC hosts a Mobile Food Pantry and this month it was at Lorena Terrace Apartments. These apartments are subsidized housing making most tenants eligibile based on eligibility. Information on Cal EITC was distributed to those in attendance.</p> <p>2019 Campaign Orientation - First 2019 Partner convening, we were able to inform key stakeholders updates on the Cal EITC eligibility. Followed by a planning session on what new outreach methods we can do to inform different communities about the Cal EITC.</p>	

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Homeless resource fair - We did outreach at a Homeless resource Fair in North East Los Angeles. We informed those that came to the information booth about the Cal EITC but also other public benefits available including Medical and Cal Fresh

Benefits meeting for Mariachi Plaza - Outreach at a workshop for Public Benefits at Hollenbeck youth Center. There were resource available from Housing, Cal fresh and other benefits available to the community including Cal EITC.

Spa 7 Community Partnership Monthly Meeting - Spa 7 Community Partnership Meeting hosted monthly for organizations in Spa 7 and we were able to inform the organization present updates on the

Other

Category	Actual (#)
Sub-Grants	0

Narrative of Expenditures in EARS and Outreach Activities

Sub-grants have not yet been awarded. They will be awarded in Dec.

GSO Admin: \$2,375.00 (Staff time at \$75/H - 31.66 Hours)

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>Organizations on the ground have been asking about public charge and the fear of applying for public benefits.</p>	
Narrative of Success Stories	
<p>No Success stories to report at this time.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8002	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1. Web	.00
2. Social Media	.00
3. Canvassing	12,750.00
4. Media	.00
5. Collateral Messaging	.00
6. Group Events	5,000.00
7. Other 1	.00
8. Other 2	2,375.00
Total	20,125.00

20 - TOTAL COSTS

1. Total Costs	20,125.00
Total	20,125.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	Sebastien@goldenstateopportunity.org
Contract Number	18T-8008
Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018

Web

Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

All expenditures for Web conducted through statewide grant.

2) Provide a narrative of education and outreach activities conducted during the month under web:

N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

N/A

Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		0	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

There are no funding allocated for social media, CalEITC4Me is conducted through the statewide grant. Although, GSO will promote specific events and VITA locations during tax season.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Management: \$1,285 (GSO Staff - \$75/H - 17 Hours)
Field Coordinator: \$4,825 (Salary)

2) Provide broad overview of canvassing for targeted zip codes:

No canvassing with potential tax filers during this reporting period. The field coordinator is currently organizing partners throughout the county to prepare to reach eligible filers during the 2019 Tax Season. This includes a convening in the city of riverside with partner organizations All of Us or None, Sigma Beta Xi, and California Partnership

3) Provide a broad overview of canvassing for non-targeted zip codes:

No canvassing in non-targeted zip codes during this reporting period.

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

No texts have been sent out. The texting program will begin in early February after W-2 have been sent out. Texting management includes working with Target Smart and Relay to ensure our Riverside Contact lists are ready and up to date. We will be sending 3-5 text messages to all contacts in Riverside:

- 1st text - Newly eligible or preparing to file and claim
- 2nd text – Determine eligibility
- 3rd text – Filing taxes for free
- 4th text – It’s not too late to file
- 5th text – Other public benefits

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to

Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report for Oct 15-Nov. Facebook Ads to begin running in January as Tax season starts and W-2's are starting to be sent out.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

GSO will be working with Signified Media Group for the Digital program that will include ads on Facebook, Instagram, and other social media outlets such as snapchat and Youtube. Signified will also create video content to be used for the advertisements. We have had initial meetings with Signified and they are working on the digital plan, and messaging to be used in Ads.

In Riverside County, The digital program will focus on the newly eligible young adult populations, and other languages such as in Spanish and Tagalog. We will also work with Signified to create GIF ads, as they were more effective last year.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

4) Indicate any leveraging of other resources conducted this month in regards to media:

Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenses for collateral messaging during this time. We will be updating our materials and created Event flyers beginning in January.

2) Provide a broad overview of flyer/brochure and poster distribution: N/A

3) Provide a listing and narrative of direct mailers that went out:

No Direct mailers have been sent out yet. We are working on designing the flyer and finding 10,000 contacts to send the mailers too. The mailers will be conducted as part of our multi-layered approach and those that receive direct mail will also receive a text message and digital Advertisement.

4) Any other additional information pertinent to work conducted including leveraging of other resources:

We ordered FTB materials to distribute, these materials are provided at no costs by FTB.

Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Sub-Grants	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>Sub-grants have not yet been awarded. We will award grantees in December. Below are the likely organizations to receive grants:</p> <p>TODEC Legal Center - seeks to empower disenfranchised immigrant communities to become economically, socially, educationally, and civically self-sufficient while enhancing individual self-esteem and community health.</p> <p>Community Action Partnership Riverside - County of Riverside Community Action is a member of a national network of over 1,100 Community Action Agencies (CAAs) across the United States</p> <p>All of or None - Part of a national organizing initiative addressing discrimination and human rights abuses faced by incarcerated/ formerly incarcerated people.</p>	

Target Area	6-Riverside
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>Organizations on the ground have been asking about public charge and the fear of applying for public benefits.</p>	
Narrative of Success Stories	
<p>No Success stories to report at this time</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn	Contract Number: 18T-8008	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,560.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	1,000.00
7.	Other 1	.00
8.	Other 2	.00
	Total	6,560.00
20 - TOTAL COSTS		
1.	Total Costs	6,560.00
	Total	6,560.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Josh Fryday / President	Signature:	Date: 12/20/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	Sebastien@goldenstateopportunity.org
Contract Number	18T-8015
Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

All expenditures for Web conducted through statewide grant.

2) Provide a narrative of education and outreach activities conducted during the month under web:

N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

N/A

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		0	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

There are no funding allocated for social media, CalEITC4Me is conducted through the statewide grant. Although, GSO will promote specific events and VITA locations in the Rural areas during tax season.

2) Provide a narrative of education and outreach activities conducted during the month under social media:

N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

N/A

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Managment - \$1,050 (GSO Staff time \$75/H - 14 Hours)

2) Provide broad overview of canvassing for targeted zip codes: N/A

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

No texts have been sent out yet. Texting management costs include time to create texting plan for the upcoming year, including working with Relay and Target smart to ensure the lists are refreshed. The texting plan includes cities and counties that will be recieveing text messages. ALL Rural counties will be texted through the program, and all contacts will be texted at least 1 time, and 3 times in the larger target counties. The larger counties include: Butte, Yolo, Shasta, El Dorado, Madera, Kings, Napa, and Humboldt.

1st text - Newly eligible or preparing to file and claim
2nd text – Determine eligibility
3rd text – Filing taxes for free

5) Provide broad overview of Phone Calls conducted:

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners)

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report for Oct 15-Nov. Facebook Ads to begin running in January as Tax season starts and W-2's are starting to be sent out.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

GSO will be working with Signified Media Group for the Digital program that will include ads on Facebook, Instagram, and other social media outlets such as snapchat and Youtube. Signified will also create video content to be used for the advertisements. We have had initial meetings with Signified and they are working on the digital plan, and messaging to be used in Ads.

In the rural counties, the digital Ads will focus on the newly eligible populations including the self-employed. Also with the counties being spreadout and not having Free Tax Sites near them, we will be promoting free online tax services as well as Free tax events near them, including the bus stops that will be conducted by co-grantee ATCAA.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

Target Area	14-Rural	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	0
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>No expenses for collateral messaging during this time.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other</p>		

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
GSO Admin	0

Narrative of Expenditures in EARS and Outreach Activities

GSO Admin: \$625

Expenditures include GSO staff time to work with Co-grantee ATCAA to plan the upcoming tax season and how to efficiently utilize both Rural grants.

GSO and ATCAA will be having monthly coordination calls to ensure that we are both working together to maximize efforts and reach as many tax filers in the rural counties as possible. This includes partering on certain events, conducting outreach to communnity colleges.

For GSO specifiially, we will provide collateral and digital support to ATCAA on the ground efforts.

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>Incorporating the larger counties that were added to the rural regions.</p>	
Narrative of Success Stories	
<p>No Success stories to report at this time.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8015	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	1,050.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	625.00
8.	Other 2	.00
Total		1,675.00

20 - TOTAL COSTS

1.	Total Costs	1,675.00
	Total	1,675.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	Sebastien@goldenstateopportunity.org
Contract Number	18T-8011
Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

All expenditures for Web conducted through statewide grant.

2) Provide a narrative of education and outreach activities conducted during the month under web:

N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

N/A

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		0	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

There are no funding allocated for social media, CalEITC4Me is conducted through the statewide grant. Although, GSO will promote specific events and VITA locations in San Bernardino County during tax season.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Managment: \$1,050 - GSO Staff time - \$75/H - 14 Hours
Grassroots Coordinator: \$4,285 (Salary)

2) Provide broad overview of canvassing for targeted zip codes:

No canvassing with potential tax filers during this reporting period. The field coordinator is currently organizing partners throughout the county to prepare to reach eligible filers during the 2019 Tax Season. This includes a convening in San Bernardino with partner organizations Congregations for Prophetic Engagement (COPE), Time for Change Foundation, and the Coachella Valley Community Tax Services (CVCTS)

These organizations are likely to be our sub-grantees that will be awarded in December so that they can begin their work in the new year. Although they will be sub-grantees, there are very much a part of our overall outreach program in SB County, each organization will be participating and hosting events, and helping to send out text messages to their members

3) Provide a broad overview of canvassing for non-targeted zip codes:

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018
<p>No texts have been sent out. The texting program will begin in early February after w-2 have been sent out and workers begin to file.</p> <p>The texting management expenses include GSO staff time to plan the upcoming texting program for 2019 including refreshing the contacts list and looking for part-time texters to bring on board. Below is a list of cities that will be contacted through the text program</p> <p>-San Bernardino, Ontario, Rialto, Upland, Colton, Fontana, Oak Hills, Vicorville, Montclair, Hesperia.</p> <p>Each contact will be sent at least one time during the season, with the target zip codes and populations receiving up to three texts.</p> <p>1st text - Newly eligible or preparing to file and claim 2nd text – Determine eligibility 3rd text – Filing taxes for free</p> <p>5) Provide broad overview of Phone Calls conducted:</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners)</p>	

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report for Oct 15-Nov. Facebook Ads to begin running in January as Tax season starts and W-2's are starting to be sent out.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

GSO will be working with Signified Media Group for the Digital program that will include ads on Facebook, Instagram, and other social media outlets such as snapchat and Youtube. Signified will also create video content to be used for the advertisements. We have had initial meetings with Signified and they are working on the digital plan, and messaging to be used in Ads.

In San Bernardino County, The digital program will focus on the newly eligible young adult populations, and in Spanish language. We will also work with Signified to create GIF ads, as they were more effective last year.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

Target Area	9-San Bernardino	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	0
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>No expenses for collateral messaging during this time. We will be updating our materials and created Event flyers beginning in January. Collateral pieces are currently being designed, however design costs are covered through State grant.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other</p>		

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	92410	11/30/18	15	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

\$1,000 - Event Management

2) Provide a brief overview of events conducted during the reporting period:

Although most events will be conducted during the tax season, specifically the events that conduct free tax preparation services to workers potentially eligible for the Cal EITC, we did host one event that was a convening of partner organization to prepare for the coming year. These organizations are the partners that will be hosting events throughout the county in partnership with CalEITC4Me.

The event management costs include GSO Grassroots coordinator's event plans for 2019. This including tmeeting with local organizations, local elected officials, and government entities about potential dates for events, and how the event can be turned into a larger community gathering.

3) If members of the press attended an event, indicate which press outlets:

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Sub-Grants	0
Narrative of Expenditures in EARS and Outreach Activities	
Sub-grants to be awarded in December.	

Target Area	9-San Bernardino
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<div style="border: 1px solid black; padding: 5px;"> <p>No challenges to report at this time.</p> </div>	
Narrative of Success Stories	
<div style="border: 1px solid black; padding: 5px;"> <p>No success stories to report at this time.</p> </div>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8011	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,335.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	1,000.00
7.	Other 1	.00
8.	Other 2	.00
Total		6,335.00
20 - TOTAL COSTS		
1.	Total Costs	6,335.00
	Total	6,335.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: _____ PCA# _____

Approved By: _____ Date: _____

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8011	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,335.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	1,000.00
7.	Other 1	.00
8.	Other 2	.00
Total		6,335.00
20 - TOTAL COSTS		
1.	Total Costs	6,335.00
	Total	6,335.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: _____ PCA# _____

Approved By: _____ Date: _____

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	sebastien@goldenstateopportunity.org
Contract Number	18T-8002
Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	12,963

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Website Management and Updates: \$4,500 (GSO Staff Time - \$75/H - 60 Hours
 -Calculator - \$2,500

2) Provide a narrative of education and outreach activities conducted during the month under web:

GSO had 12,963 website hits in the reporting period. Of those 12,963 views, 8,127 were unique visitors to the site. The views were all reached organically as CalEITC4Me has yet to begin advertising and pushing to the site.

Website Management and Updates:

GSO has added a full-time Web Developer to its staff to manage the website, make sure it is running effectively, and creating new content and updates. GSO has previously used consultants for web management and will now be able to save costs while making new changes to the website.

The website is currently under construction with the goal of having all updates completed by the end of December, in preparation for the new year and beginning of tax season. A list of website changes and updates include:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018
<ul style="list-style-type: none"> -website rotationals (creating new updated rotationals monthly) -Partners page (will create new partners page to focus on spreading resources and getting more partners to use toolkits) -Website Calculator - Working with Intuit and getting new code so that the calculator is updated with new eligibility requirements -Free Tax Prep Tool - Working on updating with all new VITA and Free Tax prep sites. Working with AARP to ensure that all of their sites in the state are included. Also working on adding additional information to the tool such as events near you. -Sign Up page - Updated the sign up page to collect data and send to new database. -Know it Page - Updated with all new Cal EITC eligibility updates -Earn It Page - Working on updated the calculator, and "Email my results tool" to capture data and follow up with those eligible -Get it page - Adding Events -Self-employed page - Updating -Young Adults Page - Finalizing content, page to be operating by end of Dec. -Older Adults Page - Finalizing messaging, page to be operating by end of Dec. -Spanish Microsite - Working on translations -Mandarin Microsite - Working on translations -Vietnamese Microsite - Working on translations, will be operations by Jan. -Russian Microsite - Working on translations, will be operations by Jan. <p>3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:</p> <p>N/A</p>	

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	26	Number of Tweets	13
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Great planning meetings this week with partners across the Los Angeles and Inland Regions! Getting ready for a busy new year of getting information out about the Cal EITC and helping to provide financial security to low-income working Californians!		Grateful to California's leadership in creating and twice expanding the #CalEITC -- did you know California became the first state to eliminate the age cap for EITC eligibility? Nobody should be ineligible for #EITC because of their age.	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenses to report at this time.

2) Provide a narrative of education and outreach activities conducted during the month under social media:

GSO social media manager posted 26 times to Facebook and 13 posts on Twitter. Most of the posts centered around the events and activities of our organizers and partners. There were convenings in Los Angeles and Riverside that brought together previous and new partners to both wrap up 2018 and plan for 2019. Please view some examples below:

Facebook Posts on Nov. 29
 If you're with an organization in the Central Valley, come join [Cal EITC 4 Me](#) and the Office of Dr. Joaquin Arambula for a training on the Cal EITC and other public benefits available for low-income Californians!

Facebook Posts on Nov. 9
 Going over the past year and the extraordinary things we've been able to accomplish in 2018 with our LA-area grantees and partners at our Boyle Heights office. We wouldn't be able to do what we do without you! Thank you!!

"Without EITCs, poverty would be 4.2% higher for women and children." Caroline Danielson [@PPICNotes](#)

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Texting Management: \$2,250 - GSO Staff Time - \$75/H - 30 Hours

2) Provide broad overview of canvassing for targeted zip codes: N/A

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Text messages have not been sent out, Texting manager worked on cutting the lists for the Statewide counties that will be texted, and working on drafting messages to be send out starting in early Feb.

Below, we outline the messages we plan to send out via each medium. This list might evolve in the coming weeks.

Text messages:

Control: This message will be straightforward and aim to simply raise awareness of the EITC.

Benefit Amount: This message will list potential maximum benefit for a household, depending on whether they have children or not.

Text Assistance: This message will encourage recipients to text back with GSO staff if they have any questions about the EITC or filing a return.

Phone Assistance: If feasible, this message would provide recipients a phone number (e.g. 211 or a local non-profit) that they could call with questions about filing a return.

VITA Nudge: This message would provide individuals in select regions with information about a nearby VITA site.

5) Provide broad overview of Phone Calls conducted:

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners)

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
(Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report for Oct 15-Nov. Facebook Ads to begin running in January as Tax season starts and W-2's are starting to be sent out.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions

GSO will be working with Signified Media Group for the Digital program that will include ads on Facebook, Instagram, and other social media outlets such as snapchat and Youtube. Signified will also create video content to be used for the advertisements. We have had initial meetings with Signified and they are working on the digital plan, and messaging to be used in Ads.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Collateral Design: \$5,000

We are currently updating all collateral materials while also designing new materials for the newly eligible populations. These collateral pieces will be ready by 2019. Most will be translated into the 7 languages that the CalEITC4Me site will be available.

Pieces that will be ready for 2019.

- New eligibility flowchart
- Benefits Wheel
- Benefits Checklist
- New Young Adult Collateral Piece
- New Older Adults Collateral Piece
- Updated Self-employed flyer

2) Provide a broad overview of flyer/brochure and poster distribution:

No flyer or brochures have been distributed at this time.

3) Provide a listing and narrative of direct mailers that went out:

N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			0	
Location	Zip Code	Date	Attendance	Press at Event?

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: N/A
- 2) Provide a brief overview of events conducted during the reporting period: N/A
- 3) If members of the press attended an event, indicate which press outlets:
- 4) Any other additional information pertinent to work conducted, including leveraging of other

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Texting Trainings	0
GSO Admin	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>Texting trainings to begin in January. We are scheduling the first training to be a webinar on the week of Jan. 14.</p> <p>GSO Admin - \$3,758</p> <p>GSO admin costs are very general operations including attending SIT meetings, completing progress reports, managing grant budgets, maintaining partner relationships, and conducting weekly meetings.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8017	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES		
1. Web		7,000.00
2. Social Media		.00
3. Canvassing		2,250.00
4. Media		.00
5. Collateral Messaging		5,000.00
6. Group Events		.00
7. Other 1		.00
8. Other 2		3,758.00
Total		18,008.00
20 - TOTAL COSTS		
1. Total Costs		18,008.00
Total		18,008.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
12/20/2018

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>One challenge is to earn media attention for events and free tax services. GSO is hoping to utilize changes to tax code as an opportunity to highlight the importance of the Cal EITC.</p>	
Narrative of Success Stories	
<p>No success stories to report at this time.</p>	

2018 CALEITC EDUCATION-OUTREACH YEAR-TO-DATE (YTD) EXPENDITURE/ACTIVITY REPORT

60482 - Koreatown Youth & Comm Ctr Inc - 18T-8003 - Approved Data

execute sp_ears_ytd_report 'TContiLuetke','18T-8003','EDUCATION-OUTREACH',1,1,9

EDUCATION AND OUTREACH ACTIVITIES	Projected	10/15/18-11/30/18	YTD	% Used
Web	69666.00	1161.94	1161.94	1.67%
Social Media	89666.00	1161.94	1161.94	1.30%
Canvassing	64666.00	1161.94	1161.94	1.80%
Media	65666.00	1161.94	1161.94	1.77%
Collateral Messaging	84666.00	1161.94	1161.94	1.37%
Group Events	54670.00	1161.95	1161.95	2.13%
Other 1	0.00	0.00	0.00	
Other 2	0.00	0.00	0.00	
Subtotal:	429000.00	6971.65	6971.65	1.63%
TOTAL COSTS	Projected	10/15/18-11/30/18	YTD	% Used
Total Costs	429000.00	6971.65	6971.65	1.63%

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Koreatown Youth and Community Center
Grantee Representative	Audrey Casillas
Telephone Number	213-365-7400 ext 5235
Email Address	Acasillas@kyccla.org
Contract Number	18T-8003
Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Web

Category	Metrics
EITC Website Hits	1,202

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

During this period, the current Web expenditure was \$1,161.94 for collaborative planning and management.

2) Provide a narrative of education and outreach activities conducted during the month under web:

The months of October and November launched the planning period for the Free Tax Prep LA steering committee. This period was used to plan the updated design the collaborative's website for the new tax year (www.freetaxprepla.com), review subcontractor bids for targeted web ads, and design web ads/banners.

For the months of November and December the participating agencies included information about Cal EITC, EITC, and VITA on agency websites. Nearly all participating agencies have an entire page dedicated to the topic.

The following sites have updated there websites. Further coordination on branding, logo, and linking is planned:

1736 Family Crisis Center

<http://www.1736familycrisiscenter.org>

All Peoples Family Center

<https://allpeoplescc.org/cal-eitc/>

Asian American Small Business Program

<http://www.apisbp.org/>

Barrio Action

http://www.barrioaction.org/index.php?option=com_content&view=article&id=102&Itemid=466&lang=en

Bresee Foundation

<https://www.bresee.org/programs/wilshire-familysource-center.html>

Childrens Collective

<http://www.childrenscollective.org/program-services/family-support/family-source-center/>

El Centro de Ayuda

<https://www.elcentrodeayuda.org/index.php/program-services/free-income-tax-assistance-itin-applications>

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
<p>El Centro del Pueblo (to be updated) http://ecdpla.org/programs-services/echo-park-familysource-center/</p> <p>Free Tax Prep Los Angeles http://www.freetaxprepla.com http://www.volunteertaxprep.com http://www.youtube.com/freetaxprepla</p> <p>Koreatown Youth and Community Center https://www.kycccla.org/services/community-economic-development-ced/get-free-tax-help/</p> <p>LA County Department of Consumer Affairs http://dcba.lacounty.gov/volunteer-income-tax-assistance/ http://dcba.lacounty.gov/financial-empowerment/</p> <p>LA Central City Neighborhood Partners https://www.laccnp.org/what-we-do.php#eitc</p> <p>Latino Resource Center https://www.latinoresource.org/programs</p> <p>New Economics for Women https://neweconomicsforwomen.org</p> <p>Toberman Center www.toberman.org</p> <p>United Way of Greater Los Angeles http://freetaxprep.unitedwayla.org https://www.unitedwayla.org/en/news-resources/blog/vita-family/</p>	

Target Area	1-Los Angeles		
Reporting Period	October 15, 2018 - November 30, 2018		
Social Media			
Number of Facebook Posts	0	Number of Tweets	32
Exact Messaging of Most-Liked Facebook Post	Exact Messaging of Most-Favorited Twitter Post		
N/A	Help families claim tax credits like the #CalEITC! @FreeTaxPrepLA will host the first of many Information Sessions this Thursday, November 15th at 6:30pm. RSVP at http://www.voluntertaxprep.com . pic.twitter.com/D9Cgxl60b4		
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: During this period, the current Social Media expenditure was \$1,161.94 for collaborative planning and management.</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media: The months of October and November was the planning period for the Free Tax Prep LA steering committee. This period was used to plan the upcoming tax season messaging and branding as it ultimately drives the direction for Social Media. The limited posts (32 via Twitter) have over 8,600 organic, unpaid impressions.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A</p>			

Target Area	1-Los Angeles	
Reporting Period	October 15, 2018 - November 30, 2018	
Canvassing		
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	0
	Canvassing in Non-Targeted Zip Codes	0
	New Individuals Who Received Text Messages	0
	Phone Calls	0
	Office Visits	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: During this period, the current Canvassing expenditure was \$1,161.94 for collaborative planning and management.</p> <p>2) Provide broad overview of canvassing for targeted zip codes: N/A</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: N/A</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A</p> <p>5) Provide broad overview of Phone Calls conducted: N/A</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: The months of October and November was the planning period for the Free Tax Prep LA steering committee. This period was used to plan the upcoming tax season canvassing strategy- coordinating with United Way of Greater Los Angeles housing sites and shelters facilities and pre-VITA season text messaging campaign.</p>		

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads (Radio)	0	0	0	0
Paid Television Ads (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:** During this period, the current Media expenditure was \$1,161.94 for collaborative planning and management.
- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:** N/A
- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:** N/A
- 4) Indicate any leveraging of other resources conducted this month in regards to media:**
- The months of October and November was the planning period for the Free Tax Prep LA steering committee. This period was used to plan the upcoming tax season media strategy -coordinating the group events with possible media launch for early January. This month was used to also design the FTPLA wall ads for laundry mats/convenient stores, and web ads.
- The collaborative focused most of the time finalizing the key messages in order to submit the final Transportation and wall ads - will launch in late December. The transportation ads are a leveraged resources secured by collaborative partner County of Los Angeles Department of Consumer and Business Affairs.

Target Area	1-Los Angeles	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	0
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: During this period, the current Collateral Messaging expenditure was \$1,161.94 for collaborative planning and management.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: Flyers and messaging were updated to include the new State and Federal EITC amounts. The flyers are available for download by partner agencies for printing, posting, and distribution.</p> <p>Partner agencies distributed flyers to all new clients a intake and orientation. The information includes information about the Federal and State EITC and free tax services available at the location. Flyers are also distributed at workshops and trainings held at the partner agencies (i.e. English as a second language, parenting classes, computer classes, immigration workshops, financial aid and education workshops, etc.). Additionally, flyers are distributed at community events, i.e. Thanksgiving food distribution event and financial aid application events.</p> <p>3) Provide a listing and narrative of direct mailers that went out: N/A</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A</p>		

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			9	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	90012	10/25/18	63	No
Community Gathering	90012	11/01/18	75	No
Free Tax Prep	90020	11/03/18	16	No
Community Gathering	90005	11/07/18	20	No
Community Gathering	90005	11/09/18	20	No
Educational Forum	90020	11/15/18	28	No
Food Bank	90011	11/16/18	112	No
Community Gathering	90010	11/16/18	20	No
Food Bank	90004	11/17/18	120	No
Food Bank	90020	11/18/18	426	No

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:** During this period, the current Group Events expenditure was \$1,161.95 for collaborative planning and management.
- 2) Provide a brief overview of events conducted during the reporting period:** Partner agencies report on outreach at events to recruit partners and service providers on Federal and State EITC and VITA services. Also, distributing information at events held at the partner agency (ie Thanksgiving events, bus token distribution, and financial aid information events).
- Free Tax Prep LA presented at the IRS's quarterly gathering of VITA programs. The presentation included the successes of previous years and plans for the upcoming year. Likewise, Free Tax Prep LA presented at a convening at California Community Foundation hosted by the Federal Reserve in it's Bi-Annual Alliance for Economic Inclusion convening. The FTPLA presentation at CCF brought awareness to financial insitutions, community organization, and other grantmakers of the efforts to increase awareness, increase VITA participation, and increase the number of individuals to access the EITC and Cal EITC.
- Free Tax Prep LA also hosted 4 community gatherings to promote EITC awareness and VITA volunteer participation at 2 financial institutions, community organization, and a housing development for formerly homeless families. At each event, Federal and State EITC information (who qualifies, income levels, the Cal EITC expansion, and how to access free assistance) was shared via presentation and flyers.
- 3) If members of the press attended an event, indicate which press outlets:** N/A
- 4) Any other additional information pertinent to work conducted, including leveraging of other resources:** N/A

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
VITA Information Sessions	24 Attendees learned about the VITA program, EITC, and the CalEITC expansion at a two day training event and information session (11/29 and 11/30).
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

The first two months focused on adjusting Subcontractor agreements and finalizing the plans for the new campaign, rather than hitting the ground and doing outreach.

Narrative of Success Stories

Success Story #1
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #2
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #3
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Koreatown Youth & Comm Ctr Inc		Contract Number: 18T-8003	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Arthur Cho / Finance Manager		E-mail Address: Acho@kyccla.org	Telephone: 213-365-7400 ex	Fax Number: 213-927-0017
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		1,161.94	
2.	Social Media		1,161.94	
3.	Canvassing		1,161.94	
4.	Media		1,161.94	
5.	Collateral Messaging		1,161.94	
6.	Group Events		1,161.95	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			6,971.65
20 - TOTAL COSTS				
1.	Total Costs			6,971.65
	Total			6,971.65
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Audrey Casillas / Economic Development Coordinator		Signature:		Date: 12/19/2018
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Orange County United Way		Contract Number: 18T-8009	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Maria Mugica / Cal EITCEd&OutreachCoord	E-mail Address: MariaM@UnitedWayOC.org		Telephone: 949-477-4506	Fax Number: 949-271-8002

10 - EDUCATION AND OUTREACH ACTIVITIES		
1.	Web	3,766.00
2.	Social Media	500.00
3.	Canvassing	6,500.00
4.	Media	1,500.00
5.	Collateral Messaging	.00
6.	Group Events	3,984.00
7.	Other 1	.00
8.	Other 2	.00
	Total	16,250.00
20 - TOTAL COSTS		
1.	Total Costs	16,250.00
	Total	16,250.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Ann Truxaw-Ramirez / Grants/Proposal Development Manager	Signature:	Date: 01/03/2019
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	Orange County United Way
Grantee Representative	Maria Mugica
Telephone Number	949-263-6102
Email Address	MariaM@UnitedWayOC.org
Contract Number	18T-8009
Target Area	7-Orange
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	3032

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Web Hosting (\$240), Web Updates (\$3526)

2) Provide a narrative of education and outreach activities conducted during the month under web:

During October/November Reporting Period all grantees (OCUW) and sub-grantees (CHIOC, CAPOC, SOS) updating websites.

Orange County United Way (OCUW) OC Free Tax Prep program oversees two tax related websites.

OCUW Tax related pages 1,921 web hits
<https://www.unitedwayoc.org/changing-lives/income/free-tax-preparation/>
<https://www.unitedwayoc.org/changing-lives/income/free-tax-preparation/earned-income-tax-credits/>
<https://www.unitedwayoc.org/changing-lives/income/free-tax-preparation/vita-volunteer/>
 OC Free Tax Prep (English and Spanish) 616 web hits
<https://www.ocfreetaxprep.com/>
 Community Health Initiative of Orange County (CHIOC)
 Web hits 495
<http://www.chioc.org/>
 Community Action Partnership of Orange County (CAPOC)
 In development for December launch
<http://www.capoc.org/>
 Share Our Selves (SOS)
 In development for December launch
<http://www.shareourselves.org/>

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

Target Area	7-Orange		
Reporting Period	October 15, 2018 - November 30, 2018		
Social Media			
Number of Facebook Posts	11	Number of Tweets	7
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Holidays can be rough on our wallets. Find out if you are leaving any money on the table at @ocfreetaxprep.com #CalEITC #EITC		Get into the spirit! Sign up to be a VITA volunteer. Learn more at www.unitedwayoc.org/volunteer #CalEITC #VITA	
Number of Other Posts (Instagram, etc.)	6	Exact Messaging of Most-Liked "Other" Post	
		We need You! It's not too late to join our team of 500 IRS-certified Volunteer Income Tax Assistance (VITA) Volunteers. Roles include: Greeter, Tax Preparer, Knowledge Expert/Quality Reviewer. Learn more at OCFreeTaxPrep.com	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Content and Posting (\$500)</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>OCUW digital marketing team updating graphics and content while posting on 3 OCUW platforms- Facebook, Twitter and Instagram. OCUW social media calendar will be informed by United Ways of California's social media toolkit, to ensure statewide and trusted messaging.</p> <p>OCUW (7 FB) (6 Tweets) (5 Instagram) CHIOC (3 FB) SOS (1 FB) (1 Tweets) (1 Instagram) CAPOC Prepping for December launch</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p>			

Target Area	7-Orange	
Reporting Period	October 15, 2018 - November 30, 2018	
Canvassing		
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	
	Canvassing in Non-Targeted Zip Codes	
	New Individuals Who Received Text Messages	
	Phone Calls	
	Office Visits	
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Payment to three Sub-grantees specific to CalEITC Education and Outreach Activities (\$54,000) 3 X \$18,000</p> <p>2) Provide broad overview of canvassing for targeted zip codes:</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes:</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent:</p> <p>5) Provide broad overview of Phone Calls conducted:</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:</p> <p>OCUW finalized sub-grantee partners for specific CalEITC canvassing, education and outreach activities in the following target zip codes: Community Health Initiative of Orange County (CHIOC) 92701 and the surrounding City of Santa Ana including phone calls and office visits Community Action Partnership of Orange County (CAPOC) 92683, 92804 and the surrounding cities of Westminster and Anaheim Share Our Selves (SOS) 92627 and the surrounding city of Costa Mesa</p>		

Target Area	7-Orange
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Digital Ad Spend (\$1500)

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

4) Indicate any leveraging of other resources conducted this month in regards to media:

OCUW working with digital ad company. Currently updating, creating content and graphics for strategic January launch of paid Facebook and Google AdWords. OCUW currently negotiating radio and Transportation advertising.

Target Area	7-Orange	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	429
	Number of New Individuals who Received Direct Mailers	
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: No costs for October/November.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>OCUW 10/25 Partner Training-40 OCUW hosted the first of 2 partner trainings. With 40 campaign partners, those who attended received updated CalEITC/EITC thresholds expansion information in addition to VITA program updates for 2019.</p> <p>11/17 Resource Fair-80 CalEITC Education and Outreach Coordinator hosted a booth at the HOAG Resource Fair. Overall attendance was 500 with about 80 participants stopping at the booth and receiving CalEITC flyers downloaded from the FTB website (until brochures arrive). We were also promoting free tax prep services that will be held at that location.</p> <p>SOS 11/19-11/21 Food Bank- 309 SOS served 309 families with holiday food bags during their Thanksgiving Food Distribution Program. Each bag contained a flyer with information regarding CalEITC, EITC and free tax prep services for the 2019 tax season.</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources:</p> <p>OCUW updated design, messaging and translation of flyers, postcards, posters to send to print December for January roll out. 10/23 CSD approved materials via email.</p>		

Target Area	7-Orange
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			5	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	92614	10/25/18	40	No
Resource Fair	92663	11/17/18	500	No
Food Bank	92627	11/19/18	137	No
Food Bank	92627	11/20/18	108	No
Food Bank	92627	11/21/18	64	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Partner Training (\$500) CalEITC Education and Outreach Coordinator (\$1680) OC Free Tax Prep Project Coordinator (\$1804)

2) Provide a brief overview of events conducted during the reporting period:

OCUW
 10/25 Partner Training
 OCUW hosted the first of 2 partner trainings. With over 40 campaign partners, those who attended received updated CalEITC/EITC thresholds expansion information in addition to VITA program updates for 2019, toolkits, PPTs, etc. for training and distribution.

11/17 Resource Fair
 CalEITC Education and Outreach Coordinator hosted a booth at the Melinda Smith Hoag Center for Healthy Living Resource Fair. Overall attendance was 500 with about 80 participants stopping at the booth and receiving CalEITC flyers downloaded from the FTB website. We were also promoting free tax prep services that will be held at that location. The center serves many low-income individuals and families from the target zip code 92627 in Costa Mesa.

SOS
 11/19-11/21 Food Bank
 SOS served 309 families with holiday food bags during their Thanksgiving Food Distribution Program. Each bag contained a flyer with information regarding CalEITC, EITC and free tax prep services for the 2019 tax season.

3) If members of the press attended an event, indicate which press outlets:

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

Target Area	7-Orange
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<p>Type Text here</p>	

Target Area	7-Orange
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>We will be able to provide success stories after we start the tax season. February 2019, tax sites are in full operation Through April 15th.</p>	
Narrative of Success Stories	
<p>Success Story #1 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #2 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #3 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Orange County United Way		Contract Number: 18T-8009	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Maria Mugica / Cal EITCEd&OutreachCoord	E-mail Address: MariaM@UnitedWayOC.org		Telephone: 949-477-4506	Fax Number: 949-271-8002

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	3,766.00
2.	Social Media	500.00
3.	Canvassing	6,500.00
4.	Media	1,500.00
5.	Collateral Messaging	.00
6.	Group Events	3,984.00
7.	Other 1	.00
8.	Other 2	.00
	Total	16,250.00

20 - TOTAL COSTS

1.	Total Costs	16,250.00
	Total	16,250.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Ann Truxaw-Ramirez / Grants/Proposal Development Manager	Signature:	Date: 01/03/2019
------------------------------------------------------------------------------------------------------	------------	---------------------

CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8005	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kelly Batson / VP, Program Operations		E-mail Address: kbatson@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	918.67		
2.	Social Media	273.25		
3.	Canvassing	.00		
4.	Media	2,612.77		
5.	Collateral Messaging	4,815.76		
6.	Group Events	.00		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	8,620.45		
20 - TOTAL COSTS				
1.	Total Costs	8,620.45		
	Total	8,620.45		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Senior Director, Contracts and Grants Co		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8006	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kelly Batson / VP, Program Operations		E-mail Address: kbatson@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	425.38		
2.	Social Media	126.53		
3.	Canvassing	.00		
4.	Media	1,209.83		
5.	Collateral Messaging	2,229.91		
6.	Group Events	.00		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	3,991.65		
20 - TOTAL COSTS				
1.	Total Costs	3,991.65		
	Total	3,991.65		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Senior Director, Contracts and Grants Co		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8010	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kelly Batson / VP, Program Operations		E-mail Address: kbatson@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	291.58		
2.	Social Media	86.73		
3.	Canvassing	.00		
4.	Media	829.27		
5.	Collateral Messaging	1,528.48		
6.	Group Events	.00		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	2,736.06		
20 - TOTAL COSTS				
1.	Total Costs	2,736.06		
	Total	2,736.06		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Senior Director, Contracts and Grants Co		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way Bay Area
Grantee Representative	Colleen Smallfield
Telephone Number	415-808-4428
Email Address	csmallfield@uwba.org
Contract Number	18T-8006
Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	11

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 The total cost for this month was \$425.38, including the cost of staff time and rent for staff working on the website.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 This period, we began to update the Earn It! Keep It! Save It! website to include changes to our volunteer pages, client outreach materials pages, and our Cal EITC page. We estimate that we had a total of 3,213 visits from San Francisco and San Mateo counties, with 11 specifically to our Cal EITC page. In future months, we plan to add additional data to our primary homepage and our tax site finder to include more information about the Cal EITC on our most popular page.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 We also added additional resources for volunteers, which will help us to administer more education sessions and hopefully more tax returns.

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	24	Number of Tweets	28
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Su reembolso puede subir cuando declare sus impuestos si hizo menos de \$25,000 en el 2018. Quedese con mas de su dinero y no pague por preparar sus impuestos! Visite: http://bit.ly/2DWVjDZ		It's sad to hear we are taxing retired filers into poverty. At the very least we can offer them free tax filing services. #Volunteer with http://www.earnitkeepitsaveit.org/volunteer	
Number of Other Posts (Instagram, etc.)	align="center">11	Exact Messaging of Most-Liked "Other" Post	
		Get excited- it's our annual conference! @UWBAYAREA #EITC #VITA #IRS #California #taxes #taxseason	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
For this period, our total costs for social media were \$126.53. This includes staff time and rent for staff dedicated to working on social media for the EITC and free tax preparation assistance.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
We are pleased to report that our most popular Facebook post was in Spanish! This period, we shared posts regarding volunteer outreach as well as content related to bringing attention to the upcoming tax season. We work with United Ways of California to create a social media calendar for each month and try to customize posts according to any special holidays or key events. We have also started posting more content on LinkedIn related to volunteer recruitment as well as communication within our network.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	N/A
Canvassing in Non-Targeted Zip Codes	N/A
New Individuals Who Received Text Messages	N/A
Phone Calls	N/A
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 We have not yet started canvassing efforts, but will in early 2019.

2) Provide broad overview of canvassing for targeted zip codes:

3) Provide a broad overview of canvassing for non-targeted zip codes:

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

5) Provide broad overview of Phone Calls conducted:

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Our costs for this period were \$1,209.83. Costs include staff time and rent for staff dedicated to creating our television and radio ads, media plans, and any other strategic planning related to media.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

4) Indicate any leveraging of other resources conducted this month in regards to media:

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	9,314
Number of New Individuals who Received Direct Mailers	N/A

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
The expenditures this period were \$2,229.91. This includes:
- \$70.29 for translation services
- \$1,121.28 for printing
- \$1,038.34 for staff time and rent dedicated to creating and distributing materials

2) Provide a broad overview of flyer/brochure and poster distribution:
Our most popular piece of collateral was our client postcard and we aimed to start circulating them during the late fall in October and November. Hence, at our regional convening, we gave away tens of thousands of these cards. We are also partnering with new outreach partners in San Francisco and San Mateo targeting immigrant communities. New partners in these efforts include La Cocina, Rafael House, and La Raza Centro Legal among others.

3) Provide a listing and narrative of direct mailers that went out:
None

4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	94111	11/14/18	30	No
Educational Forum	94111	11/29/18	30	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 There were no costs associated with 'Group Events' during this reporting period.

2) Provide a brief overview of events conducted during the reporting period:
 We hosted events with UWBA partners to get the word out about free tax preparation and the EITC to many local organizations (including businesses) in the month of October. We also held our annual regional meeting for all of our VITA sites and partners in October; representatives from the Franchise Tax Board were in attendance.

3) If members of the press attended an event, indicate which press outlets:

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	4-San Francisco/San Mateo
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

This period, we spent significant effort talking with sites about the new tax law, which has been rather time-intensive. Otherwise, we do not have challenges to report.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8006	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kelly Batson / VP, Program Operations		E-mail Address: kbatson@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		425.38	
2.	Social Media		126.53	
3.	Canvassing		.00	
4.	Media		1,209.83	
5.	Collateral Messaging		2,229.91	
6.	Group Events		.00	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			3,991.65
20 - TOTAL COSTS				
1.	Total Costs			3,991.65
	Total			3,991.65
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Senior Director, Contracts and Grants Co		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way Bay Area
Grantee Representative	Colleen Smallfield
Telephone Number	415-808-4428
Email Address	csmallfield@uwba.org
Contract Number	18T-8010
Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	15

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 The total cost for this month was \$291.58, including the cost of staff time and rent for staff working on the website.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 This period, we began to update the Earn It! Keep It! Save It! website to include changes to our volunteer pages, client outreach materials pages, and our Cal EITC page. We estimate that we had a total of 3,228 visits from San Francisco and San Mateo counties, with 11 specifically to our Cal EITC page. United Way Wine Country had 4 visitors to their Cal EITC page. In future months, UWBA plans to add additional data to our primary homepage and our tax site finder to include more information about the Cal EITC on our most popular page.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 We also added additional resources for volunteers, which will help us to administer more education sessions and hopefully more tax returns.

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	25	Number of Tweets	28
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>Su reembolso puede subir cuando declare sus impuestos si hizo menos de \$25,000 en el 2018. Quedese con mas de su dinero y no pague por preparar sus impuestos! Visite: http://bit.ly/2DWVjDZ</p>		<p>It's sad to hear we are taxing retired filers into poverty. At the very least we can offer them free tax filing services. #Volunteer with http://www.earnitkeepitsaveit.org/volunteer</p>	
Number of Other Posts (Instagram, etc.)	align="center">11	Exact Messaging of Most-Liked "Other" Post	
		<p>Get excited- it's our annual conference! @UWBAYAREA #EITC #VITA #IRS #California #taxes #taxseason</p>	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
For this period, our total costs for social media were \$86.73. This includes staff time and rent for staff dedicated to working on social media for the EITC and free tax preparation assistance.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
We are pleased to report that our most popular Facebook post was in Spanish! This period, we shared posts regarding volunteer outreach as well as content related to bringing attention to the upcoming tax season. We work with United Ways of California to create a social media calendar for each month and try to customize posts according to any special holidays or key events. We have also started posting more content on LinkedIn related to volunteer recruitment as well as communication within our network. In Sonoma County, United Way Wine Country/CAP Sonoma had one well liked Facebook post: "Attn: New changes to the #CalEITC could help even more Californians in 2019! You may qualify even if you: 1) made under \$25,000 2) work on your own or for someone else 3) are 18-24 with no dependents; and 4) are over 65 with no dependents."

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	N/A
Canvassing in Non-Targeted Zip Codes	N/A
New Individuals Who Received Text Messages	N/A
Phone Calls	N/A
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
We have not yet started canvassing efforts, but will in early 2019.
- 2) Provide broad overview of canvassing for targeted zip codes:
- 3) Provide a broad overview of canvassing for non-targeted zip codes:
- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
- 5) Provide broad overview of Phone Calls conducted:
- 6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Our costs for this period were \$829.27. Costs include staff time and rent for staff dedicated to creating our television and radio ads, media plans, and any other strategic planning related to media.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

4) Indicate any leveraging of other resources conducted this month in regards to media:

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	4,836
Number of New Individuals who Received Direct Mailers	N/A

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 The expenditures this period were \$1,528.48. This includes:
 - \$48.18 for translation services
 - \$768.57 for printing
 - \$711.73 for staff time and rent dedicated to creating and distributing materials

- 2) Provide a broad overview of flyer/brochure and poster distribution:
 Our most popular piece of collateral was our client postcard and we aimed to start circulating them during the late fall in October and November. Hence, at our regional convening, we gave away tens of thousands of these cards. We are also partnering with new outreach partners in Contra Costa County, including Immigrants Rising. In Sonoma County, United Way Wine Country has not yet begun these efforts.

- 3) Provide a listing and narrative of direct mailers that went out:
 None

- 4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	94596	10/17/18	11	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 There were no costs associated with 'Group Events' during this reporting period.

2) Provide a brief overview of events conducted during the reporting period:
 We hosted events with UWBA partners to get the word out about free tax preparation and the EITC to many local organizations (including businesses) in the month of October. We also held our annual regional meeting for all of our VITA sites and partners in October; representatives from the Franchise Tax Board were in attendance.

3) If members of the press attended an event, indicate which press outlets:

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	8-Contra Costa/Sonoma
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

This period, we spent significant effort talking with sites about the new tax law, which has been rather time-intensive. Otherwise, we do not have challenges to report.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8010	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kelly Batson / VP, Program Operations		E-mail Address: kbatson@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	291.58		
2.	Social Media	86.73		
3.	Canvassing	.00		
4.	Media	829.27		
5.	Collateral Messaging	1,528.48		
6.	Group Events	.00		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	2,736.06		
20 - TOTAL COSTS				
1.	Total Costs	2,736.06		
	Total	2,736.06		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Senior Director, Contracts and Grants Co		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way Bay Area
Grantee Representative	Colleen Smallfield
Telephone Number	415-808-4428
Email Address	csmallfield@uwba.org
Contract Number	18T-8005
Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	24

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 The total cost for this month was \$918.67, including the cost of staff time and rent for staff working on the website.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 This period, we began to update the Earn It! Keep It! Save It! website to include changes to our volunteer pages, client outreach materials pages, and our Cal EITC page. We estimate that we had a total of 6,940 visits from Alameda and Santa Clara counties, with 24 specifically to our Cal EITC page. In future months, we plan to add additional data to our primary homepage and our tax site finder to include more information about the Cal EITC on our most popular page.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 We also added additional resources for volunteers, which will help us to administer more education sessions and hopefully more tax returns.

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	24	Number of Tweets	28
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Su reembolso puede subir cuando declare sus impuestos si hizo menos de \$25,000 en el 2018. Quedese con mas de su dinero y no pague por preparar sus impuestos! Visite: http://bit.ly/2DWVjDZ		It's sad to hear we are taxing retired filers into poverty. At the very least we can offer them free tax filing services. #Volunteer with http://www.earnitkeepitsaveit.org/volunteer	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
11		Get excited- it's our annual conference! @UWBAYAREA #EITC #VITA #IRS #California #taxes #taxseason	

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
For this period, our total costs for social media were \$273.25. This includes staff time and rent for staff dedicated to working on social media for the EITC and free tax preparation assistance.

- 2) Provide a narrative of education and outreach activities conducted during the month under social media:
We are pleased to report that our most popular Facebook post was in Spanish! This period, we shared posts regarding volunteer outreach as well as content related to bringing attention to the upcoming tax season. We work with United Ways of California to create a social media calendar for each month and try to customize posts according to any special holidays or key events. We have also started posting more content on LinkedIn related to volunteer recruitment as well as communication within our network.

- 3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	N/A
Canvassing in Non-Targeted Zip Codes	N/A
New Individuals Who Received Text Messages	N/A
Phone Calls	N/A
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
We have not yet commenced canvassing efforts in October or November.
- 2) Provide broad overview of canvassing for targeted zip codes:
- 3) Provide a broad overview of canvassing for non-targeted zip codes:
- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
- 5) Provide broad overview of Phone Calls conducted:
- 6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Our costs for this period were \$2,612.77. Costs include staff time and rent for staff dedicated to creating our television and radio ads, media plans, and any other strategic planning related to media.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

4) Indicate any leveraging of other resources conducted this month in regards to media:

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	28,946
Number of New Individuals who Received Direct Mailers	N/A

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
The expenditures this period were \$4,815.76. This includes:
- \$151.80 for translation services
- \$2,421.54 for printing
- \$448.48 for staff time and rent dedicated to creating and distributing materials

2) Provide a broad overview of flyer/brochure and poster distribution:
Our most popular piece of collateral was our client postcard and we aimed to start circulating them during the late fall in October and November. Hence, at our regional convening, we gave away tens of thousands of these cards. We also printed an Alameda County specific postcard in conjunction with our partnership with First5, The Alameda County Community Food Bank, and AC-OCAP. This year, we also worked with new outreach partners and delivered these outreach cards in Spanish, Chinese, and Vietnamese to organizations like Immigrants Rising, Wardrobe for Opportunity, and many others.

3) Provide a listing and narrative of direct mailers that went out:
None

4) Any other additional information pertinent to work conducted including leveraging of other resources:
We were excited to partner with other agencies to redesign our postcard for an Alameda specific outreach campaign.

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	94686	10/19/18	8	No
Educational Forum	95112	10/22/18	15	No
Educational Forum	94303	10/17/18	60	No
Community Gathering	94612	10/30/18	120	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 There were no costs associated with 'Group Events' during this reporting period.

2) Provide a brief overview of events conducted during the reporting period:
 We hosted events with UWBA partners to get the word out about free tax preparation and the EITC to many local organizations (including businesses) in the month of October. We also held our annual regional meeting for all of our VITA sites and partners in October; representatives from the Franchise Tax Board were in attendance.

3) If members of the press attended an event, indicate which press outlets:

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	3-Alameda/Santa Clara
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

This period, we spent significant effort talking with sites about the new tax law, which has been rather time-intensive. Otherwise, we do not have challenges to report.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8005	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Kelly Batson / VP, Program Operations		E-mail Address: kbatson@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	918.67		
2.	Social Media	273.25		
3.	Canvassing	.00		
4.	Media	2,612.77		
5.	Collateral Messaging	4,815.76		
6.	Group Events	.00		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	8,620.45		
20 - TOTAL COSTS				
1.	Total Costs	8,620.45		
	Total	8,620.45		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Senior Director, Contracts and Grants Co		Signature:	Date: 12/20/2018	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Ways of California		Contract Number: 18T-8018	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Max Moy-Borgen / Income Program Manager		E-mail Address: mmoy-borgen@unitedwaysca.org	Telephone: 510-499-3734	Fax Number: 877-908-8922
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		3,657.21	
2.	Social Media		4,142.93	
3.	Canvassing		6,444.39	
4.	Media		3,794.78	
5.	Collateral Messaging		4,019.38	
6.	Group Events		4,145.16	
7.	Other 1		495.48	
8.	Other 2		495.48	
	Total			27,194.81
20 - TOTAL COSTS				
1.	Total Costs			27,194.81
	Total			27,194.81
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Nalleli Sandoval / Financial Stability Director		Signature:		Date: 01/02/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Ways of California
Grantee Representative	Max Moy-Borgen
Telephone Number	510-499-3734
Email Address	mmoy-borgen@unitedwaysca.org
Contract Number	18T-8018
Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	1841

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 UWCA: Staff Salary & Benefits - \$2,661.21, Web Host Fee - \$70 (Total = \$2,731.21). INLAND EMPIRE: No; INLAND VALLEYS: Web Posting (\$100), Website Content Development (\$100), Administration (\$25), Data Collection (\$25) (Total = \$250), KERN: SNo; MERCED: No. MONTEREY: No. NORTHERN CALIFORNIA: No. SANTA BARBARA: Staff Time - \$76, NORTHERN SANTA BARBARA: No expenses reported. VENTURA: No. WINE COUNTRY: No

Subtotal: \$3,057.21

2) Provide a narrative of education and outreach activities conducted during the month under web:

UWCA has EITC information placed and is working on updating key messaging and website updates with vendor, expected to be finalized in January. Northern Santa Barbara: Website is being restructured and moving to a new host as of 11/30/18. Statistics reflect analytics of website traffic in month of November. Pages include VITA/CalEITC/Financial Stability page, Home page with VITA/CalEITC feature, and volunteer page with VITA/CalEITC feature. We did several workplace campaigns in which we asked individuals to visit our web page for additional information on VITA/CalEITC. Have paid bilingual ads planned for social media to start in December. SANTA BARBARA: Staff began collecting and drafting EITC related webpages to go live in December 2018. Staff reviewed best practices and pages for other organizations to ensure that UWSBC pages will be as impactful as possible.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	48	Number of Tweets	27
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A (for UWCA see other posts below)		Attn: New changes to the #CalEITC could help even more Californians in 2019! You may qualify even if you: 1) made under \$25,000 2) work on your own or for someone else 3) are 18-24 with no dependents; and 4) are over 65 with no dependents.	
Number of Other Posts (Instagram, etc.)	4	Exact Messaging of Most-Liked "Other" Post	
		N/A (for UWCA see other posts below)	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff (Salary & Benefits) for Social Media - \$3,194.53, Social Media Tools - \$59, Total = \$3,253.53. INLAND EMPIRE: No. INLAND VALLEYS = Content Development and Calendar (\$50) posting on platforms \$50, Total = \$100, KERN: No; MERCED: No. MONTEREY: No. NORTHERN CALIFORNIA: No. NORTHERN SANTA BARBARA: No; SANTA BARBARA: Staff Time = \$125. VENTURA: Staff Time = \$64.40; WINE COUNTRY: No.

Subtotal: \$3,542.93

2) Provide a narrative of education and outreach activities conducted during the month under social media:

UWCA developed January social media toolkit and worked on CalEITC Awareness Toolkit. INLAND VALLEYS liked and shared posts from UWCA and other local partners. Liked and shared EITC messages from other funders. SANTA BARBARA: Staff drafted and posted social media posts per the UWCA social media calendar. Staff also interacted with social media users to encourage further engagement. VENTURA: 2 posts made with general EITC information.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

UWCA: Twitter: "Attn: New changes to the #CalEITC could help even more Californians in 2019! You may qualify even if you: 1) made under \$25,000 2) work on your own or for someone else 3) are 18-24 with no

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018
<p>quality even if you: 1) made under \$25,000 2) work on your own or for someone else 3) are 18-24 with no dependents; and4) are over 65 with no dependents." INLAND VALLEYS: FB Post: "New changes to the #CalEITC could help even more Californians in 2019! You may qualify even if you: 1) made under \$25,000 2) work on your own or for someone else 3) are 18-24 with no dependents; and4) are over 65 with no dependents." Twitter: "Get into the giving spirit! Sign-up to be a VITA volunteer! #CalEITC #VITA"</p> <p>KERN: FB Post: "Representatives of different United Ways in the state came together to discuss best practices for CalEITC outreach and VITA programs at the Annual United Ways of California CalEITC convening in Sacramento." NORTERN SANTA BARBARA: FB Post: "You could see your refund climb in 2019 if you made under \$25,000 this year! Keep more of your money and don't pay to file in 2019. Visit: http://bit.ly/2saruWJ Su reembolso puede subir cuando declare sus impuestos si hizo menos de \$25,000 en el 2018. Quedese con mas de su dinero y no pague por preparar sus impuestos!" VENTURA: Twitter: "Holidays can be rough on our wallets. Find out if you're leaving any \$\$ on the table, including for #CalEITC and #EITC using @BenefitKitchen. Answer a few questions and find out!" WINE COUNTRY: FB Post: "You could see your refund climb in 2019 if you made under \$25,000 this year! Keep more of your money and don't pay to file in 2019. Visit: http://bit.ly/2saruWJ"</p>	

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	14
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	20
Office Visits	24

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 UWCA: Staff (Salary & Benefits) - \$3,194.53, Statewide System Tools - \$2,388.86 Total = \$5,583.39.
 INLAND EMPIRE: No; MERCED: No; MONTEREY: No. NORTHERN CALIFORNIA: No. SANTA BARBARA: Staff Time = \$261.

Subtotal: \$5,844.39

2) Provide broad overview of canvassing for targeted zip codes:

NORTH COAST VOLUNTEER OPPORTUNITIES NETWORK: Following NCO Policies and Procedures, the Program Director submitted a Request to Hire form for a part-time General Help employee to fulfill the Cal EITC canvassing outreach in Mendocino County. A current NCO Volunteer Network Program Coordinator was informed of the canvassing responsibilities and agreed to temporarily add

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018
<p>additional hours to fulfill outreach tasks in Lake County. SANTA BARBARA: Canvassing office visits in 14 targeted zipcodes: Main targeted zip codes identified as 93401, 93402, 93403, 93405, 93406, 93412, 93420, 93421, 93427, 93433, 93434, 93440, 93436, 93438, 93454, 93455, 93456, 93458, 93460, 93463.</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes:</p> <p>N/A</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent:</p> <p>UWCA working on campaign strategy for all subgrantees through Riverstar, Community Connect Labs, and X2AI vendors.</p> <p>5) Provide broad overview of Phone Calls conducted:</p> <p>SANTA BARBARA: Outgoing phone calls not traditionally used by SM office, although some may occur later in campaign. Community Impact Associate phoned community partners to coordinate EITC efforts and arrange for community presentations/distributions of materials for their clients.</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:</p> <p>KERN: canvassing efforts are underway between UWKC and Vision y Compromiso (KC Promotora Network) and messaging training is scheduled for this month (Dec). SANTA BARBARA: community partners will be receiving and sharing information with their clients and staff to get the word out about EITC</p>	

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
(Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff (Salary and benefits) totaling \$3,194.78.

Subtotal: \$3,194.78.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

N/A

4) Indicate any leveraging of other resources conducted this month in regards to media:

United Way Northern Santa Barbara did do live media interviews to promote VITA/CalEITC. United Ways of California provided messaging guidance and around PSA placements for subgrantees.

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	1,300
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff (Salary and Benefits) = \$2,606.9 and Subscriptions Print and Digital = \$164.4, Total = \$2,825.30, KERN: Staff time and mileage = \$421.08. SANTA BARBARA: Staff Time = \$173.

Subtotal: \$3,419.38

2) Provide a broad overview of flyer/brochure and poster distribution:

UWCA: Began drafting outreach materials, postcards, and other useful information to distribute to subgrantees, KERN: distributed flyers/brochure and posters to: Shafter Elemenatry School Parent Center Meeting, Bakersfield Southeast collaborative meeting, Delano Collab meeting, Greenfield Collab meeting, PCL Industries Campaign presentation where we provided outreach to over 60 employees and over 200 fliers were distributed, 34Th street Collab meeting, Kern County Probabtion services Dept presentation / flier distribution, Shafter Collab, College Heights Elem School Parent Presentation at "Pozole y Padres" school event, South Bakersfield Collab meeting, Foothill HS parent presentation, Frazier Park Mountain Communities presentation and flier distribution, Mojave Collab presentation and flier distribution, Arvin HS parent center meeting NORTH COAST VOLUNTEER OPPORTUNITY NETWORK: The Program Director for NCO researched outreach material available through the Cal EITC website. Outreach materials were received in the mail on November 30th. SANTA BARBARA: Digital Media Specialst Heather Kunkle began designing the campaign using the targeted audience from previous VITA campaigns.

3) Provide a listing and narrative of direct mailers that went out:

N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	93003	11/28/18	30	No
Educational Forum		10/18/18	20	No
Educational Forum		10/25/18	29	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 UWCA: Staff (Salary and Benefits) = \$2,661.22, Travel = \$1459.56, Total = \$4,120.78,
 VENTURA: Staff Time = \$24.38.

Subtotal: \$4,145.16

2) Provide a brief overview of events conducted during the reporting period:
 UWCA: Arranged statewide convening for all subgrantees to discuss best practices and messaging alignment for CalEITC Day and Tax Week (29 people). [Also did a webinar presentation on CalEITC for Sacramento Covered staff \(approx. 20 people\).](#) INLAND EMPIRE: went to an outreach event in the community to provide individuals with information about 211 services and programs provided through out the county that help. Provided a number of people with information on CAL EITC and how to receive the benefit. VENTURA: Presentation made to resident management staff of Cabrillo Economic Development Corporation an affordable housing provider with 26 properties across Ventura County. Provided information on CalEITC and VITA services. Staff will distribute over 1000 VITA flyers to resident households. Purpose of presentation was to inform staff of CalEITC eligibility and availability of VITA services so they could encourage residents to use services of a VITA site.

3) If members of the press attended an event, indicate which press outlets:
 N/A

4) Any other additional information pertinent to work conducted, including leveraging of other

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
211	
DMV	
Narrative of Expenditures in EARS and Outreach Activities	
<p>UWCA: Indirect costs totaling \$495.48 for 211.</p> <p>UWCA: indirect costs totaling \$495.48 for DMV Ads.</p> <p>UWCA Worked with Motor Vehicle Network to secure contract for DMV ad placements and will run in late January.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Ways of California		Contract Number: 18T-8018	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Max Moy-Borgen / Income Program Manager		E-mail Address: mmoy-borgen@unitedwaysca.org	Telephone: 510-499-3734	Fax Number: 877-908-8922
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		3,657.21	
2.	Social Media		4,142.93	
3.	Canvassing		6,444.39	
4.	Media		3,794.78	
5.	Collateral Messaging		4,019.38	
6.	Group Events		4,145.16	
7.	Other 1		495.48	
8.	Other 2		495.48	
	Total			27,194.81
20 - TOTAL COSTS				
1.	Total Costs			27,194.81
	Total			27,194.81
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Nalleli Sandoval / Financial Stability Director		Signature:		Date: 01/02/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

Target Area	15-Statewide
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

N/A

Narrative of Success Stories

Success Story #1

Date of Success Story: N/A
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story: N/A
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story: N/A
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way CA Capital Region		Contract Number: 18T-8007	Report Period: 10/15/18 - 11/30/18	Adjustment: 1
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916368300
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	6.16		
2.	Social Media	.00		
3.	Canvassing	256.85		
4.	Media	550.00		
5.	Collateral Messaging	161.50		
6.	Group Events	252.30		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	1,226.81		
20 - TOTAL COSTS				
1.	Total Costs	1,226.81		
	Total	1,226.81		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Jennifer Macias / Chief Operating Officer		Signature:	Date: 01/10/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way CA Capital Region		Contract Number: 18T-8007	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916-386-3013
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web			55.96
2.	Social Media			.00
3.	Canvassing			2,335.00
4.	Media			5,000.00
5.	Collateral Messaging			1,468.16
6.	Group Events			2,293.58
7.	Other 1			.00
8.	Other 2			.00
	Total			11,152.70
20 - TOTAL COSTS				
1.	Total Costs			11,152.70
	Total			11,152.70

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Jennifer Macias / Chief Operating Officer	Signature:	Date: 12/19/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
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Approved By:	Date:
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State of California
 DEPARTMENT OF COMMUNITY SERVICES AND
 DEVELOPMENT
 2018 Cal EITC Grant Progress Report
 CSD 171PR (Rev. 11/18)

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way California Capital Region
Grantee Representative	Amy Williamson
Telephone Number	916-856-3993
Email Address	amy.williamson@uwccr.org
Contract Number	18T-8007
Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

Web

Category	Metrics
EITC Website Hits	454

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

\$55.96 YourFreeTaxPrep.org domain renewal with Network solutions

\$6.16 Indirect (11 percent of category total)

TOTAL: \$62.12

2) Provide a narrative of education and outreach activities conducted during the month under web:

We are currently updating content on the program page.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

n/a

Target Area		5-Sacramento	
Reporting Period		October 15, 2018 - November 30, 2018	
Social Media			
Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
NA		NA	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		NA	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>We did not have any social media activity during this reporting time period.</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>We did not have any social media activity during this reporting time period</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p> <p>n/a</p>			

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	298
Canvassing in Non-Targeted Zip Codes	192
New Individuals Who Received Text Messages	
Phone Calls	3
Office Visits	728

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Program work costs from sub-grantees:
Asian Resources: \$1353.08
Community Link: \$156.17 (Initial development for Script Deployment in the Interactive Voice Response (IVR) system messaging)
International Rescue Committee: \$140.05
La Familia: \$225.00
Mutual Assistance Network: \$59.81

UWCCR staff time: \$400.89

Indirect: \$256.85 (11 percent of category total)

TOTAL: \$2,591.85

2) Provide broad overview of canvassing for targeted zip codes:

See attached Word document.

3) Provide a broad overview of canvassing for non-targeted zip codes:

See attached Word document.

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

n/a

5) Provide broad overview of Phone Calls conducted:

IRC made three phone calls to clients actively employed and seeking financial coaching services.

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

See attached Word document.

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
(Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

\$5,000 media consultant fees for media strategy and buying

\$550 Indirect (11 percent of category total)

TOTAL: \$5,550

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

No paid media ran during this reporting period.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

No earned media during this reporting period.

4) Indicate any leveraging of other resources conducted this month in regards to media:

n/a

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

\$475.00: Design fees for edits to main Cal EITC flyer with translation
 \$800.00: Translation services for Cal EITC flyer (8 languages)
 \$193.16: UWCCR staff time
 \$161.50 Indirect (11 percent of category total)

TOTAL: \$1629.66

2) Provide a broad overview of flyer/brochure and poster distribution:

No distribution of materials during this reporting period.

3) Provide a listing and narrative of direct mailers that went out:

No direct mail this reporting period.

4) Any other additional information pertinent to work conducted including leveraging of other resources:

n/a

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			15	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	95824	10/16/18	52	No
Community Gathering	95610	10/17/18	69	No
Community Gathering	95817	10/18/18	29	No
Educational Forum	95818	10/18/18	30	No
Community Gathering	95824	10/22/18	38	No
Community Gathering	95817	10/23/18	22	No
Community Gathering	95610	10/24/18	40	No
Community Gathering	95824	11/02/18	65	No
Community Gathering	95820	11/02/18	75	No
Church	95824	11/11/18	92	No
Educational Forum	95825	11/17/18	15	No
Educational Forum	95825	11/27/18	7	No
Educational Forum	95825	11/27/18	5	No
Educational Forum	95825	11/29/18	16	No
Educational Forum	95825	11/30/18	9	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Program work costs from sub-grantees:

Asian Resources: \$1638.00
 Community Link: \$0
 International Rescue Committee: \$229.69
 La Familia: \$25.00
 Mutual Assistance Network: \$0

UWCCR staff time: \$400.89

Indirect: \$252.30

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018
<p><u>TOTAL: \$2,545.88</u></p> <p>2) Provide a brief overview of events conducted during the reporting period:</p> <p>See attached Word document.</p> <p>3) If members of the press attended an event, indicate which press outlets:</p> <p>n/a</p>	

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Asian Resources

The holidays are in full swing and many individuals are not ready to think about filing taxes yet. ARI understands this, but wants to continue outreaching so they are aware of the free tax preparation service. ARI is also pushing to educate more community members about Cal EITC and encouraging them to file, even if they are not required to, as they may be eligible for Cal EITC.

Community Link

Due to extensive disaster response, while there was development of initial disaster messaging for deployment in the Interactive Voice Response (IVR) system, messaging was not deployed so as to not negatively impact wait times during critical response periods.

UWCCR

As in years past, despite working as quickly as possible to update our key Cal EITC flyer for partners, this task took a long time with translation factored in and delivery will not occur until Dec. 28. We do still feel this piece is worth the time, as our partners give it consistently good feedback. In the interim, partners gave information verbally and/or crossed out and updated information on last year's flyers.

Narrative of Success Stories

Success Story #1 (Asian Resources)

Date of Success Story: n/a

Name of Person from Success Story: n/a

Zip-Code Where Person Lives: n/a

VITA Site where person got taxes done (if applicable): n/a

Narrative: Many individuals and families shared that they were not aware of any free tax prep services through VITA. They were excited to obtain more information and are eager to schedule an appointment when the time comes closer.

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way CA Capital Region		Contract Number: 18T-8007	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916-386-3013
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	55.96		
2.	Social Media	.00		
3.	Canvassing	2,335.00		
4.	Media	5,000.00		
5.	Collateral Messaging	1,468.16		
6.	Group Events	2,293.58		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	11,152.70		
20 - TOTAL COSTS				
1.	Total Costs	11,152.70		
	Total	11,152.70		

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Jennifer Macias / Chief Operating Officer	Signature:	Date: 12/19/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

Target Area	5-Sacramento
Reporting Period	October 15, 2018 - November 30, 2018
<p>Success Story #2 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p> <p>Success Story #3 Date of Success Story: Name of Person from Success Story: Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): Narrative:</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way CA Capital Region		Contract Number: 18T-8007	Report Period: 10/15/18 - 11/30/18	Adjustment: 1
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916368300
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		6.16	
2.	Social Media		.00	
3.	Canvassing		256.85	
4.	Media		550.00	
5.	Collateral Messaging		161.50	
6.	Group Events		252.30	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			1,226.81
20 - TOTAL COSTS				
1.	Total Costs			1,226.81
	Total			1,226.81
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Jennifer Macias / Chief Operating Officer		Signature:		Date: 01/10/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Fresno & Madera Co		Contract Number: 18T-8013	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Suliana Juarez / IT Coordinator	E-mail Address: Sjuarez@uwfm.org	Telephone: 559-243-3665	Fax Number: 5592288159	
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	.00		
2.	Social Media	.00		
3.	Canvassing	4,390.62		
4.	Media	561.26		
5.	Collateral Messaging	290.82		
6.	Group Events	.00		
7.	Other 1	214.78		
8.	Other 2	.00		
	Total	5,457.48		
20 - TOTAL COSTS				
1.	Total Costs	5,457.48		
	Total	5,457.48		

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Lindsay Callahan / President and CEO	Signature:	Date: 12/20/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way of Fresno and Madera Counties
Grantee Representative	Suliana Juarez
Telephone Number	559-243-3665
Email Address	sjuarez@uwfm.org
Contract Number	18T-8013
Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	44

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 No expenses occurred this month.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 Update CalEITC 2018 webpage with new qualifications issued by FTB on the site. Collaboration meeting with Community Partners regarding adding a CALEITC page on thier websites for the new tax year.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N /A

Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 No Costs during this period.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 No activites to report for this period.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A

Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	100
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Staff Salaries for this period: (\$4259.65) Service Fee for Tables for November (\$130.97) = Total Expenses (\$4390.62)

- 2) Provide broad overview of canvassing for targeted zip codes:
 No canvassing in target area during this period. Staff spent time working with local agencies and partners to schedule future events and areas to canvass for the upcoming months.

- 3) Provide a broad overview of canvassing for non-targeted zip codes:
 Staff attended a community food distribution and handed out CAL EITC flyers to families who attended the event. Staff verbally shared recent changes to the eligibility for the tax credits and answered questions asked by the families in attendance.

- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
 Staff is developing the text messaging campaign that is scheduled to be launched in the upcoming month. No texts were sent during this period.

- 5) Provide broad overview of Phone Calls conducted: No calls were made this month.

Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
(Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
Staff Salaries (\$561.26) Total Costs for period: \$561.26

- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

- 4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	12-Fresno	
Reporting Period	October 15, 2018 - November 30, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	2,128
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: Staff Salaries (\$290.82) Total Expenses: \$290.82</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: Flyer contained information in regards to how you can obtain CalFresh benefits as well as the Cal EITC. Flyer also have contact infomrtaiion for the Department of Social Services in Madera County as well as 211 where they can get more information on free tax preparation, 92 were distributed. 2036 emails were sent out containg CalEITC logo with active link.</p> <p>3) Provide a listing and narrative of direct mailers that went out: No direct mailers were sent out this period.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: Used flyers from caleitc4me.org and updated eligibity information provided by FTB.</p>		

Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	93638	11/21/18	100	Yes

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
No expenditures this period

2) Provide a brief overview of events conducted during the reporting period:
Event was a resource fair and food distribution for the holiday at First 5 Madera

3) If members of the press attended an event, indicate which press outlets:
Univision and Madera Tribune were present at the event doing broadcast.

4) Any other additional information pertinent to work conducted, including leveraging of other resources:
N/A

Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Grantee Meetings	5 meetings CSD and SIT monthly
Narrative of Expenditures in EARS and Outreach Activities	
<p>Expenses: Staff Salaries total expenses: \$214.78</p> <p>Staff attendance to regular meetings required by grantor.</p>	

Target Area	12-Fresno
Reporting Period	October 15, 2018 - November 30, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

No challenges to report

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Fresno & Madera Co		Contract Number: 18T-8013	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Suliana Juarez / IT Coordinator	E-mail Address: Sjuarez@uwfm.org	Telephone: 559-243-3665	Fax Number: 5592288159	
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web			.00
2.	Social Media			.00
3.	Canvassing			4,390.62
4.	Media			561.26
5.	Collateral Messaging			290.82
6.	Group Events			.00
7.	Other 1			214.78
8.	Other 2			.00
	Total			5,457.48
20 - TOTAL COSTS				
1.	Total Costs			5,457.48
	Total			5,457.48

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Lindsay Callahan / President and CEO	Signature:	Date: 12/20/2018
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Youth Policy Institute		Contract Number: 18T-8001	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Miriell Thompson / Grant Manager	E-mail Address: miriell.thompson@ypiusa.org	Telephone: 213-688-2802	Fax Number: 213-688-2802	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	2,604.00
2.	Social Media	6,244.00
3.	Canvassing	17,070.00
4.	Media	3,813.00
5.	Collateral Messaging	4,997.00
6.	Group Events	7,980.00
7.	Other 1	.00
8.	Other 2	.00
	Total	42,708.00
20 - TOTAL COSTS		
1.	Total Costs	42,708.00
	Total	42,708.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Steven Schultz / Chief Financial Officer	Signature:	Date: 01/07/2019
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Youth Policy Institute
Grantee Representative	Martha Nemecek
Telephone Number	323.940.4189
Email Address	mnemecek@ypi.org
Contract Number	18T-8001
Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Web	
Category	Metrics
EITC Website Hits	1942

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Development of website content design (\$868), website hits reporting guidelines (\$868), and website technical support (\$868). Overall web activity-expenditure cost = \$2,604

2) Provide a narrative of education and outreach activities conducted during the month under web:

During the month of October and November, Youth Policy Insitute's (YPI) CalEITC outreach team and YPI's communications team met to discuss YPI's CalEITC webpage, located at <http://ypi.org/caleitc>, and the necessary changes needed to ensure Los Angeles communities receive correct information regarding CalEITC eligibility, new adjustments, where to locate and when to access free tax preparation services, as well the expansion of the CalEITC tax credit.

Additionally, YPI will be utilizing Google Analytics to track the number of visits to each designated CalEITC webpage, the average time spent on each page, as well as where the web traffic has come from on all YPI CalEITC webpages. With this addition to the YPI CalEITC webpage, all visits to the page has been tracked and in total, YPI's CalEITC webpages has received over 1,942 website hit during the month of October and November.

YPI's CalEITC team will also be working closely with representatives of Los Angeles's Translation and Interpretation agency to ensure the CalEITC webpage information we provide will be available to the many different communities of Los Angeles. With Los Angeles's Translation and Interpretation agency's assistance, YPI's CalEITC webpage will be available in 6 languages, in addition to English and Spanish: Russian, Armenian, Japanese, Korean, Tagalog, and Thai. YPI's CalEITC team is working with YPI's communications team in regards to publishing the developed content on the YPI CalEITC webpage

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

N/A

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Social Media

Number of Facebook Posts	15	Number of Tweets	77
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Join us and @CalEITC4Me as we prepare for the 2019 tax season.		Take advantage of our #volunteer opportunities and join our team! #taxes #CalEITC #Jobs -- https://pbs.twimg.com/media/Dqxz8jaVYAAeZGN.jpg	
Number of Other Posts (Instagram, etc.)	8	Exact Messaging of Most-Liked "Other" Post	
		#CalEITC not only improves financial struggles for individuals and families but it also helps improve health, as seen in the image above. What is CalEITC? How does it benefit families? Real Health Affairs article on the tax refund expansion by	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Creation of social media calendar (\$3122) & Development of social media toolkit (\$3122). Overall social media activity-expenditure costs = \$6244

2) Provide a narrative of education and outreach activities conducted during the month under social media:

YPI has created all social media accounts, including a Twitter (<http://twitter.com/ypiempowers>), Facebook (<http://facebook.com/ypiempowers>), and Instagram (<http://instagram.com/ypiempowers>) account. YPI will be utilizing HootSuite to automatically post on all our connected social media platforms. With this tool, we will be able to schedule pre-developed social media content such as tweets that will be posted at specific dates and times.

Additionally, YPI has hired a full-time temporary Social Media Specialist. She will be focusing on the content for all of YPI's CalEITC social media platforms. In her previous roles, she has worked on social media campaigns for book releases, movie screenings, news releases and exclusive promotions. She has also written several blog articles for different media outlets such as television, movies, and books. Lastly, our Social Media Specialist is familiar with the work YPI's Financial Empowerment team does, as well, as the importance of spreading the awareness of CalEITC to Los Angeles communities due to being a part of the CalEITC outreach team the previous year.

YPI's CalEITC Social Media Specialist has been creating personable tweets for Twitter which will allow our audience to better connect with the importance of both EITC credits and information on free tax preparation provided by VITA locations. By doing so, we have been able to post 77 tweets during the months of October and November. Also, YPI's CalEITC Social Media Specialist has been utilizing the following hashtags to reach an even larger online audience: ThursdayThoughts, TuesdayMotivation, ItsYourMoney, and MondayMotivation.

Lastly, our Social Media Specialist has been posting daily on our Instagram (8 posts to Instagram) and Facebook (15 posts to Facebook) account. During the month of October and November, our Social Media Specialist has created informative posts that not only brings awareness to the CalEITC, but also the benefits of how it will help low-to-middle income families.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
<p>See attached document titled YPIEmpowers_TwitterOctNov.pdf for examples on the messaging used on YPI's Twitter account for CalEITC.</p> <p>See attached document titled YPIEmpowers_FacebookOctNov.pdf for examples on the messaging used on YPI's Facebook account for CalEITC.</p> <p>See attached document titled YPIEmpowers_InstagramOctNov.pdf for examples on the messaging used on YPI's Instagram account for CalEITC.</p>	

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	224
Office Visits	513

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

CalEITC distribution at YPI's city funded FamilySource Center (\$8535) & creation of target and non-targeted canvassing mapping areas (\$8535). Overall canvassing activity-expenditure cost = \$17070

2) Provide broad overview of canvassing for targeted zip codes:

YPI's CalEITC outreach team is currently developing a plan of best practices and methods when conducting canvassing and outreach in targeted zip codes.

3) Provide a broad overview of canvassing for non-targeted zip codes:

Similar to canvassing in targeted zip codes, YPI's CalEITC outreach team is currently developing a plan of best practices and methods when conducting canvassing and outreach in non-targeted zip codes.

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

YPI has established an account with ClubTexting and have imported our contacts into the program. Text messages have not been sent out, however, CalEITC text messaging content has been created to send out to over 500 contacts.

5) Provide broad overview of Phone Calls conducted:

YPI's CalEITC outreach team and YPI's Hollywood FamilySource Center team conducted a total of 224

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
<p>phone calls during the months of October and November. During these phone calls, YPI staff spoke to participants about what CalEITC is, how to claim it, and if they were interested in filing taxes for free with the Volunteer Income Tax Assistance program offered at YPI's Hollywood FamilySource Center, the Ventanilla Financiera at the Mexican Consulate, or at YPI's WorkSource Center located in Pacoima, CA 91331.</p> <p>6) Provide broad overview of interactions conducted during Office Visits: YPI's Hollywood FamilySource Center (HFSC) received a total of 513 office visits, 103 in October and 410 in November, from clients who received flyers and information regarding CalEITC relevant information, eligibility, and how to claim CalEITC on their taxes. At the HFSC, clients receive case management, provides after school programs and ESL classes to the community.</p> <p>7) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: During the months of October and November, YPI was in the process of hiring 6 staff members who will be responsible for conducting canvassing the areas of Pacoima, East Hollywood, Pico Union,</p>	

Target Area	1-Los Angeles			
Reporting Period	October 15, 2018 - November 30, 2018			
Media				
Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0
Narrative of Expenditures in EARS and Outreach Activities				

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

1) List the various activity-expenditures charging for this month and their cost:

Production costs associated with PSAs involving Adam Rodriguez (\$1907) and development of content related information for ethnic newspaper printed ads (\$1906). Overall media activity-expenditure costs = \$3813

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

Media was not obtained during the months of October and November. During this time, YPI's CalEITC outreach team and YPI's communications team has been in discussion to strategize the best methods of investing in media coverage, as it can be challenge in Los Angeles to obtain media coverage. However, by strategizing, we will have an opportunity to reach an audience of potential filers and the goal is to create as much breadth and depth of coverage as possible.

4) Indicate any leveraging of other resources conducted this month in regards to media:

YPI's CalEITC outreach team has been working on the content as well as the design of the printed ads to be able to share with ethnic newspapers such as Hoy, La Opinion, and LA Rakurs, which targets populations with limited-English proficiency, specifically whose first language is Spanish and Russian. YPI's CalEITC outreach team is waiting for the design to be completed so we are able to purchase advertisement spaces in the ethnic newspapers starting in January.

Additionally, YPI's CalEITC outreach team and YPI's communications team has been collaborating on content development in regards to the creation of financial education vdieos and a public service announcement related to CalEITC and VITA. The videos will be shared on YPI's CalEITC website as well as the various social media platforms the CalEITC outreach team will be utilizing. Also, YPI's communications team has been in contact with YPI's Celebrity Brand Ambassador, Adam Rodriguez, a well-recognized, highly regarded celebrity, who is very passionate about lifting families out of poverty, and has been on both network television shows like CSI: Miami, Criminal Minds, and Blockbuster films. In his role and similiar to the previous year, he will be promoting the CalEITC as well as the availability of federal EITC and access to VITA services through the various social media accounts he utilizes with YPI's social media tool kit.

YPI has plans to begin filming with Adam Rodriguez for the financial education videos and the public service announcement as early as January 2019. Adam Rodriguez will be provided information regarding the new adjustments and eligibility regarding CalEITC, who will then use his public figure,

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	168
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Printing of collateral material for material distribution (\$2498.50) & creation of direct mailer distribution list (\$2498.50). Overall collateral messaging activity-expenditure costs = \$4997

2) Provide a broad overview of flyer/brochure and poster distribution:

YPI received collateral material in both English and Spanish during a CalEITC4me CSD LA County CalEITC Grantee Planning meeting held on December 7, 2018. Prior to receiving collateral material from CalEITC4me, YPI downloaded and printed flyers using the collateral material provided on the CalEITC4me website. YPI's CalEITC Social Media Specialist is working in collaboration with YPI's communications team and graphic designer on the design of potential flyer/brochures the CalEITC outreach team will be distributing during our outreach and education efforts. Once the flyers have been designed, they will be sent to CSD for review before they are distributed to the public.

3) Provide a listing and narrative of direct mailers that went out:

YPI's CalEITC outreach team is in the process of creating a distribution list as well as strategizing the best method to obtain potential filer contact information (addresses and/or phone number) to ensure direct mailers are being sent to individuals who may be eligible to receive CalEITC. Additionally, YPI's CalEITC team will be collaborating with YPI's communications team in creating the design of the direct mailers. Once the design of the direct mailers have been created, CSD will be sent a copy for approval.

4) Any other additional information pertinent to work conducted including leveraging of other resources:

YPI's CalEITC outreach team has compiled a list of over 170 schools within the various zip codes. YPI's CalEITC outreach team will continue to build rapport with the schools and its administration to ensure the outreach team is able to provide educational information regarding CalEITC to the parents, who may be eligible to receive CalEITC.

YPI's CalEITC outreach team and the City of Los Angeles's Promise Zone team has been discussing methods and strategies to work together in terms of outreach and education in the Los Angeles community. The Los Angeles Promise Zone Initiative is a collective impact project involving leaders from government, local institutions, non-profits and community organizations that targets resources

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018

Group Events

Total Number of Events Held During the Reporting Period	8
---------------------------------------------------------	---

Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	90029	11/02/18	20	No
Educational Forum	90029	11/09/18	20	No
Educational Forum	90029	11/30/18	20	No
Educational Forum	90057	10/30/18	20	No
Educational Forum	90057	11/06/18	20	No
Educational Forum	90057	11/08/18	20	No
Educational Forum	90057	11/13/18	20	No
Educational Forum	90057	11/27/18	20	No
Community Gathering	90038	10/23/18	300	No

Narrative of Expenditures in EARS and Outreach Activities

List the various activity expenditures showing for this month and their cost.

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
<p>1) List the various activity-expenditures charging for this month and their cost: YPI Financial Empowerment team & YPI staff conducting presentations/outreach at events (\$3990) & YPI Gala Prep for Master of Ceremonies, Adam Rodriguez (\$3990). Overall group event activity expenditure cost = \$7980</p> <p>2) Provide a brief overview of events conducted during the reporting period: On October 23, 2018, YPI held its annual fundraising gala at Paramount Studios, where over 300 guests were present; also, the event did not utilize funding for the purchase of food and drink at the event. YPI's Financial Empowerment Celebrity Brand Ambassador, Adam Rodriguez, was the event's Master of Ceremonies. In his role, Adam Rodriguez brought awareness of the Financial Empowerment work YPI is doing, which includes CalEITC as well as our VITA services. In addition to Adam Rodriguez being in attendance, there were also a number of elected officials during YPI's annual fundraising gala such as Nancy Pelosi, House Democratic Leader; Ted Lieu, U.S. Representative; Jimmy Gomez, U.S. Representative; Xavier Becerra, State Attorney General; Tom Torlakson, State Superintendent of Public Instruction; Bob Hertzberg, State Senator; Miguel Santiago, State Assemblymember; Eric Garcetti, Mayor of the City of Los Angeles; Mike Feuer, L.A. City Attorney; Ron Galperin, LA City Controller; Nury Martinez, LA City Councilmember; Monica Rodriguez, LA City Councilmember; Gil cedillo, LA City Councilmember; Monica Garcia, Los Angeles Unified School District (LAUSD) Board President; Nick Melvoin, LAUSED Board Vice President; Kelly Gonez, LAUSD Board Member; and Mike Fong, LA Community College District Board President.</p> <p>Additionally, during the month of October and November, YPI staff conducted CalEITC outreach during regular scheduled programming at YPI's Hollywood FamilySource Center (HFSC) which offers a number of services such as family services, academic tutoring, public benefit screening and application assistance, case management, adult education, and financial capability services including the VITA program.</p> <p>Members of YPI's Financial Empowerment team also conducted daily presentations to the visitors attending the Mexican Consulate's Vetanilla Financiera, which provides access to financial education, financial coaching, and access to socially responsible financial products to individuals receiving services at the Mexican Consulate. Over the course of a month, there have been over 100 potential filers who have been receiving CalEITC collateral information via brief five minute presentations at the various waiting areas inside the Mexican Consulate. With the study flow of individuals, it allows YPI to provide a large number of collateral materials on a daily basis and to provide short presentations.</p> <p>3) If members of the press attended an event, indicate which press outlets: N/A</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: N/A</p>	

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	

Target Area	1-Los Angeles
Reporting Period	October 15, 2018 - November 30, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>YPI was not able to hire promoters during this reporting period. As a result, we were unable to successfully engage with potential filers during canvassing efforts in targeted and non-targeted zipcodes. However, despite this challenge, the CalEITC outreach team has successfully been able to reach potential filers daily via our social media platforms and we have successfully hired promoters to begin in December.</p>	
Narrative of Success Stories	
No success stories at this time.	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Youth Policy Institute		Contract Number: 18T-8001	Report Period: 10/15/18 - 11/30/18	Adjustment: 0
Prepared by (Name/Title): Miriell Thompson / Grant Manager	E-mail Address: miriell.thompson@ypiusa.org	Telephone: 213-688-2802	Fax Number: 213-688-2802	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	2,604.00
2.	Social Media	6,244.00
3.	Canvassing	17,070.00
4.	Media	3,813.00
5.	Collateral Messaging	4,997.00
6.	Group Events	7,980.00
7.	Other 1	.00
8.	Other 2	.00
	Total	42,708.00
20 - TOTAL COSTS		
1.	Total Costs	42,708.00
	Total	42,708.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title): Steven Schultz / Chief Financial Officer	Signature:	Date: 01/07/2019
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: INFO LINE of San Diego County		Contract Number: 18T-8004	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Brian Nolan / Director of Operations		E-mail Address: nolan@211sandiego.org	Telephone: 858-300-1290	Fax Number: 858-300-1301
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		.00	
2.	Social Media		145.85	
3.	Canvassing		11,085.30	
4.	Media		.00	
5.	Collateral Messaging		570.41	
6.	Group Events		962.19	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			12,763.75
20 - TOTAL COSTS				
1.	Total Costs			12,763.75
	Total			12,763.75
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Paul Redfern / COO/CFO		Signature:		Date: 01/31/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	Infoline of San Diego
Grantee Representative	Leticia Martinez
Telephone Number	858-300-1221
Email Address	lmartinez@211sandiego.org
Contract Number	
Target Area	2-San Diego
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	593

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

In December, our 2-1-1 San Diego tax information web page included information regarding the upcoming tax season, free VITA appointments, income guidelines and the tax credits available, with a stronger focus on Californians whose low income does not require them to file taxes, and workers with income up to the required threshold. Our subcontractors/partners continue to be highlighted towards the bottom of the page. In December, there were 593 unique web visits based on Google Analytics.

2-1-1 San Diego home page: <https://211sandiego.org/>

Dedicated CalEITC web page: <https://211sandiego.org/resources/basic-needs/financial-assistance-tax-information/>

Website Development: \$0 this month

2) Provide a narrative of education and outreach activities conducted during the month under web:

The 2-1-1 tax information page provides CalEITC eligibility information, highlighting older adults ages 65 and above, as well as those ages 18-24, and EITC eligibility. The webpage redirects those interested in CalEITC and free VITA tax preparation to call 2-1-1.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

The 2-1-1 San Diego tax information web page is offered in various languages including English, Spanish, Arabic, Persian, Vietnamese, Filipino, and Chinese (simplified and traditional).

Target Area	2-San Diego		
Reporting Period	December 1, 2018 - December 31, 2018		
Social Media			
Number of Facebook Posts	3	Number of Tweets	4
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
The California Earned Income Tax Credit (CalEITC) is a cash-back credit designed to put money in the pockets of low-income working families and individuals. Interested in saving some money or getting money back this tax season?! Call 2-1-1 to learn about @Cal EITC 4 Me		The California Earned Income Tax Credit (CalEITC) is a cash-back credit designed to put money in the pockets of low-income working families and individuals. Interested in saving some money or getting money back this tax season?! Call 2-1-1 to learn about @CalEITC4Me	
Number of Other Posts (Instagram, etc.)	N/A	Exact Messaging of Most-Liked "Other" Post	
		N/A	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>In the month of December, there were a total of 3 Facebook posts and 4 Twitter posts published. There were a total of 1,342 Facebook reaches and 5,210 Twitter impressions.</p> <p>Social Media costs: 7 posts = 3.50 hours x \$41.67 per hour = \$145.85</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>In December, we leveraged the closing of the holiday season to promote the upcoming tax preparation season to redirect the community and our partners to our dedicated 2-1-1 San Diego tax assistance web page.</p> <p>Since we regularly acquire new partners who serve our community, and since our social media presence is growing, we find it valuable to create a sense of excitement for new and existing clients to encourage people to visit our website or to call us and learn more about the free services available.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p> <p>N/A</p>			

Target Area	2-San Diego
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1,930
Canvassing in Non-Targeted Zip Codes	60
New Individuals Who Received Text Messages	0
Phone Calls	68
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 2-1-1 San Diego Community Connectors continued to receive CalEITC, and EITC Outreach & Education training in the Month of December. Education and Outreach activities continued during the month of December. 2-1-1 San Diego conducted 68 one-to-one phone interactions for CalEITC, EITC, and VITA.
 2-1-1 San Diego phone calls: 68 inbound calls = 6.80 hours x \$24.30 per hour = \$165.24
 2-1-1 San Diego contact center management:
 Service Delivery Manager: 16 hours x \$41.25/hr = \$660.48
 Program Assistants: 18.67 hours x \$25.50/hr = \$476.09
 Director of Enrollment & Navigation Services: 32 hours x \$53.54/hr = \$1,713.28
 2-1-1 San Diego training: \$0 this month
 Child Development Associates: \$109.40
 Dreams For Change: \$6,188.48
 International Rescue Committee: \$862.33
 YMCA Childcare Resource Service: \$910.00

2) Provide broad overview of canvassing for targeted zip codes:
 Dreams for Change conducted 1,922 door to door outreach activities in the targeted zip code of 92101.

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent: Text messaging activity is scheduled to begin in January 2019, once VITA appointments are available.

5) Provide broad overview of Phone Calls conducted: Of the 68 one-to-one phone interactions conducted by 2-1-1 San Diego, 8 of those were in the targeted zip codes of 91910, 91911, 92101, 92105, and 92115. The remaining 60 were in non-targeted zip codes.

6) Any other additional information pertinent to work conducted during the month in relation to

Target Area	2-San Diego
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

N/A

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

N/A

Target Area	2-San Diego	
Reporting Period	December 1, 2018 - December 31, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	3,706
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>In the month of Decmeber, Dreams for Change distributed 125 flyers, and YMCA distributed 3,581.</p> <p>\$374.24 (Dreams For Change) + \$120.00 (YMCA) = \$494.24 total Child Development Associates: \$76.17</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>N/A</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>N/A</p>		

Target Area	2-San Diego
Reporting Period	December 1, 2018 - December 31, 2018

Group Events

Total Number of Events Held During the Reporting Period			5	
Location	Zip Code	Date	Attendance	Press at Event?
School	92115	12/01/18	12	No
School	92113	12/05/18	200	Yes
School	92113	12/12/18	15	No
Library	92101	12/13/18	4	No
School	92113	12/05/18	100	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

2-1-1 San Diego attended a total of 4 outreach events during the month of December 2018, reaching 231 individuals. Dreams for Change attended 1 outreach event in December 2018, reaching 100 individuals.

2-1-1 San Diego Community Booths:
 Outreach Staff: 22.5 hours x \$24.30 per hour = \$546.75
 Mileage: 112.6 miles x \$0.545 per mile = \$41.20 (line item budget limit reached)
 Dreams for Change: \$374.24

2) Provide a brief overview of events conducted during the reporting period:

2-1-1 San Diego attended the following events and provided CalEITC brochures, outreach & education to participants:

12/1/2018 - 1st Annual Darnall Charter School PArEnt Conference (12 attendees)
 12/5/2018 - Final 2018 Community Outreach Event (200 attendees)
 12/12/2018 - Post-High Resource Fair (15 attendees)
 12/13/2018 - Partnership Meeting (4 attendees)

3) If members of the press attended an event, indicate which press outlets: N/A

Target Area	2-San Diego
Reporting Period	December 1, 2018 - December 31, 2018
Other: Automated Recording	
Category	Actual (#)
Recording Played to Callers	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>Type Text here:</p> <p>Automated recording is expected to begin in January 2019.</p>	

Target Area	2-San Diego
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

The biggest challenge for December 2018 was for Community Connectors to promote tax credit information, and free tax preparation assistance before VITA appointments were available. To address this, Community Connectors obtained permission from likely-eligible callers to call them once we were able to schedule a VITA appointment on their behalf, if likely eligible. Those callers have been included in our outbound activities taking place in January 2019.

Narrative of Success Stories

Success Story #1
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #2
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #3
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: INFO LINE of San Diego County		Contract Number: 18T-8004	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Brian Nolan / Director of Operations		E-mail Address: nolan@211sandiego.org	Telephone: 858-300-1290	Fax Number: 858-300-1301
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		.00	
2.	Social Media		145.85	
3.	Canvassing		11,085.30	
4.	Media		.00	
5.	Collateral Messaging		570.41	
6.	Group Events		962.19	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			12,763.75
20 - TOTAL COSTS				
1.	Total Costs			12,763.75
	Total			12,763.75
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Paul Redfern / COO/CFO		Signature:		Date: 01/31/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Amador-Tuolumne CAA		Contract Number: 18T-8016	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Alison McElwee / Fiscal Services Coordinator		E-mail Address: amcelwee@atcaa.org	Telephone: 2092231485	Fax Number: 2092234178
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	223.24		
2.	Social Media	860.28		
3.	Canvassing	376.78		
4.	Media	1,347.32		
5.	Collateral Messaging	1,037.70		
6.	Group Events	440.72		
7.	Other 1	195.65		
8.	Other 2	1,899.75		
	Total	6,381.44		
20 - TOTAL COSTS				
1.	Total Costs	6,381.44		
	Total	6,381.44		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Bruce Giudici / Fiscal Officer		Signature:		Date: 01/22/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Amador-Tuolumne CAA		Contract Number: 18T-8016	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Alison McElwee / Fiscal Services Coordinator		E-mail Address: amcelwee@atcaa.org	Telephone: 2092231485	Fax Number: 2092234178
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	223.24		
2.	Social Media	860.28		
3.	Canvassing	376.78		
4.	Media	1,347.32		
5.	Collateral Messaging	1,037.70		
6.	Group Events	440.72		
7.	Other 1	195.65		
8.	Other 2	1,899.75		
	Total	6,381.44		
20 - TOTAL COSTS				
1.	Total Costs	6,381.44		
	Total	6,381.44		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Bruce Giudici / Fiscal Officer		Signature:		Date: 01/22/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAC of Santa Barbara County		Contract Number: 18T-8014	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Elizabeth Fry / Accounting Manager		E-mail Address: Efry@cacsb.com	Telephone: 805-964-8857	Fax Number: 805-683-0417
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	3,439.54		
2.	Social Media	1,697.55		
3.	Canvassing	934.02		
4.	Media	513.03		
5.	Collateral Messaging	437.96		
6.	Group Events	919.51		
7.	Other 1	701.39		
8.	Other 2	.00		
	Total	8,643.00		
20 - TOTAL COSTS				
1.	Total Costs	8,643.00		
	Total	8,643.00		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): K Adornetto / cfo		Signature:		Date: 02/15/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	Community Action Commission of Santa Barbara County
Grantee Representative	Kemba Lawrence
Telephone Number	805-964-8857
Email Address	klawrence@cacsb.com
Contract Number	18T-8014
Target Area	13-Ventua/Santa Barbara
Reporting Period	December 1, 2018 - December 31, 2018

Web

Category	Metrics
EITC Website Hits	143

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

- * **Ventura County Web click through monitoring and reporting \$76.08**
- * **Interace 211 Resource Page creation both counties Ventura and Santa Barbara \$2625**
- * **211 Program Manager managed the developement of program content for web pages, content accuracy and contract negotiation and payment schedule \$300.50**
- * **Program oversite CAC Director- Establish sub-contractor program goals, contract scope of services, reporting requirements \$437.95**
- * **CACSB Indirect Cost \$116.90**

2) Provide a narrative of education and outreach activities conducted during the month under web:

Updated the website to include VITA volunteer information for United Way North County.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: **N/A**

Target Area		13-Ventura/Santa Barbara	
Reporting Period		December 1, 2018 - December 31, 2018	
Social Media			
Number of Facebook Posts	25	Number of Tweets	22
Exact Messaging of Most-Liked Facebook Post Did you know California became the first State to eliminate the age gap for EITC Eligibility? No one should be ineligible for #EITC because of their age. You Earned it! Claim It.		Exact Messaging of Most-Favored Twitter Post The EITC expands financial security. workers mainly use their credit to pay for cesisites like groceries, transportation, medical expenses, rent and utilities. The tax fund can also help build savings plan!	
Number of Other Posts (Instagram, etc.)	1	Exact Messaging of Most-Liked "Other" Post	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>IT and Social Media Staff Ventura County developing contect and calendar schedule for Twitter, and Facebook \$1,117.28</p> <p>CACSB Sub contract social media posting \$143.21</p> <p>CACSB Indirect Cost \$116.90</p> <p>Program Oversight CAC Director \$437.95</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>Post included link to 211 CAL EITC resource pages which highlighted potential maximum credits, and income guidelines</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p>			

Target Area	13-Ventua/Santa Barbara	
Reporting Period	December 1, 2018 - December 31, 2018	
Canvassing		
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	
	Canvassing in Non-Targeted Zip Codes	
	New Individuals Who Received Text Messages	
	Phone Calls	
	Office Visits	
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>CAC Director Program Pulled 3,0000 names for Push text campaign for FY 2017 \$437.95 211 Program Manager created content for text messaging campaign and established reporting parameters for Interface both counties \$300.50 Indirect Cost \$116.90 Ventura County Canvassing \$195.56</p> <p>Actual roll out pushed to January. Additional time needed to pull fiscal year 2017 data from sub-contractors</p> <p>2) Provide broad overview of canvassing for targeted zip codes: N/A</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: N/A</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A</p> <p>5) Provide broad overview of Phone Calls conducted: N/A</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:</p>		

Target Area	13-Ventua/Santa Barbara
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads				
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

CAC Director Salary Created content for TV Commercial and web site placement \$437.95
CACSB Indirect \$116.90

Television scheduled to run January 28th and Print to begin 2/1/18

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: **N/A**

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: **N/A**

4) Indicate any leveraging of other resources conducted this month in regards to media: **N/A**

Target Area	13-Ventua/Santa Barbara	
Reporting Period	December 1, 2018 - December 31, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	400
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>CAC Director Salary \$437.95 211 Program Manager \$300.49</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>Distributed information to Toys for Tots families on</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>Content being created and sent for approval</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A</p>		

Target Area	13-Ventua/Santa Barbara
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

Narrative of Success Stories

Success Story #1
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #2
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #3
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAC of Santa Barbara County		Contract Number: 18T-8014	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Elizabeth Fry / Accounting Manager		E-mail Address: Efry@cacsb.com	Telephone: 805-964-8857	Fax Number: 805-683-0417
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	3,439.54		
2.	Social Media	1,697.55		
3.	Canvassing	934.02		
4.	Media	513.03		
5.	Collateral Messaging	437.96		
6.	Group Events	919.51		
7.	Other 1	701.39		
8.	Other 2	.00		
	Total	8,643.00		
20 - TOTAL COSTS				
1.	Total Costs	8,643.00		
	Total	8,643.00		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): K Adornetto / cfo		Signature:		Date: 02/15/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 12/1/18 - 12/31/18	Adjustment: 1
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		32.53	
2.	Social Media		32.53	
3.	Canvassing		302.87	
4.	Media		32.53	
5.	Collateral Messaging		162.64	
6.	Group Events		87.46	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			650.56
20 - TOTAL COSTS				
1.	Total Costs			650.56
	Total			650.56
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 02/19/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		325.28	
2.	Social Media		325.28	
3.	Canvassing		3,028.82	
4.	Media		325.28	
5.	Collateral Messaging		1,626.41	
6.	Group Events		874.56	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			6,505.63
20 - TOTAL COSTS				
1.	Total Costs			6,505.63
	Total			6,505.63
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:		Date: 01/23/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	Community Action Partnership of Kern
Grantee Representative	Sandi Truman
Telephone Number	661-834-1724
Email Address	struman@capk.org
Contract Number	18T-8012
Target Area	10-Kern/Tulare
Reporting Period	December 1, 2018 - December 31, 2018

Web

Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

<p>1) List the various activity-expenditures charging for this month and their cost: \$325.28 Staff time;</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web: None for December. Development and testing of site linkages underway with links on CAPK website. Shared progress/links with Tulare CSET. Preparing for January launch.</p> <p>3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: None for December</p>

Target Area	10-Kern/Tulare		
Reporting Period	December 1, 2018 - December 31, 2018		
Social Media			
Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: \$325.28 Staff time</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media: Planning/development for January including promotion for CAPK's annual EITC Awareness Event. The CAPK EITC Awareness Day event to promote both CalEITC and Federal EITC, is scheduled for January 25, 2019, at the CAPK VITA site, (300 19th Street Bakersfield, CA. 93301). Each year, CAPK VITA celebrates/promotes these tax credits with funding partners, local and State government representatives, and a proclamation from the County of Kern. The event receives coverage from local media and is heavily promoted through social media.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: None for December</p>			

Target Area	10-Kern/Tulare	
Reporting Period	December 1, 2018 - December 31, 2018	
Canvassing		
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	0
	Canvassing in Non-Targeted Zip Codes	0
	New Individuals Who Received Text Messages	0
	Phone Calls	0
	Office Visits	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: \$3,028.82 Staff time.</p> <p>2) Provide broad overview of canvassing for targeted zip codes: None for December Developing/printing materials and scheduling for January push, to coincide with tax season.</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: None for December</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: None for December</p> <p>5) Provide broad overview of Phone Calls conducted: None for December</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: None for December</p>		

Target Area	10-Kern/Tulare
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0		0	
Paid Radio Ads	0		0	
Public Services Announcements (Radio)	0		0	
Paid Television Ads	0		0	
Public Services Announcements (T.V.)	0		0	
Billboards	0		0	
Transit Advertisements	0		0	
Internet/Website Ads	0		0	
Social Media Promoted/Boosted Ads	0		0	

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: **\$325.28**
Staff time
- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: None for December
 Developing posters/ads to be placed on 96 GET Busses, (Kern County's public transit system) in January.
- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: None for December
- 4) Indicate any leveraging of other resources conducted this month in regards to media:
 Prepared press releases for CAPK's EITC awareness event. CAPK usually receives great coverage of this annual event.

Target Area	10-Kern/Tulare
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	310
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: **\$1,626.41 Staff time.**
- 2) Provide a broad overview of flyer/brochure and poster distribution:
- CalEITC staff visited two CAPK Head Start Center’s Holiday Parent meetings. Many of the parents were very interested to learn about CalEITC and VITA. CalEITC staff gave a brief overview of CalEITC, handed out brochures, and was available to answer any questions the parents might have. A **total of 85 brochures** were handed out as follows:
- CAPK Head Start, Stine Rd., **20 English and 15 Spanish brochures were distributed to parents.**
 - CAPK Head Start, Pioneer Dr. **25 English and 25 Spanish brochures distributed to parents.**
- CAPK has arranged to set up a table to promote CalEITC at the Valley Plaza Mall, Bakersfield’s only indoor shopping mall. On three different days, CalEITC staff distributed a total of **225 brochures promoting CalEITC and staff discussed ways they could obtain assistance with accessing the credits through tax services such as VITA.**
- 3) Provide a listing and narrative of direct mailers that went out: None for December
- 4) Any other additional information pertinent to work conducted including leveraging of other resources: None for December

Target Area	10-Kern/Tulare
Reporting Period	December 1, 2018 - December 31, 2018

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
School	93309	12/13/18	20	No
School	93306	12/17/18	25	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: **\$874.56 Staff time.**

2) Provide a brief overview of events conducted during the reporting period:

As discussed in the Collateral messaging section above, CalEITC staff visited two CAPK Head Start Center’s Holiday Parent meetings. Many of the parents were very interested to learn about CalEITC and VITA. CalEITC staff gave a brief overview of CalEITC, handed out brochures, and was available to answer any questions the parents might have. **A total of 85 brochures** were handed out as follows:

- CAPK Head Start, Stine Rd., **20 English and 15 Spanish brochures were distributed to parents.**
- CAPK Head Start, Pioneer Dr. **25 English and 25 Spanish brochures distributed to parents.**

3) If members of the press attended an event, indicate which press outlets: None

4) Any other additional information pertinent to work conducted, including leveraging of other resources:

As discussed in the Media section, staff worked on planning the CAPK EITC Awareness Day event to promote both CalEITC and Federal EITC, is scheduled for January 25, 2019, at the CAPK VITA site, (300 19th Street Bakersfield, CA. 93301). Each year, CAPK VITA celebrates/promotes these tax credits with funding partners, local and State government representatives, and a proclamation from the County of Kern. The event receives coverage from local media and is heavily promoted through social media.

Target Area	10-Kern/Tulare
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	

Target Area	10-Kern/Tulare
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

December is a short work month for CalEITC staff due to holidays. To maximize the limited number of work days, CalEITC Staff focused on Head Start Centers and the Valley Plaza Mall, to conduct outreach.
 Staff also worked on planning heavy outreach and promotion to begin in January, to coincide with the upcoming tax season.
CAPK has set-up coding, invoicing etc. to capture and report expenditures in EARS.

Narrative of Success Stories

Success Story #1
 Met with United Way Kern County to discuss ways to link tax payers to the Kern VITA Partnership and collaborate in outreach efforts for CalEITC.

Success Story #2
 Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3
 Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 12/1/18 - 12/31/18	Adjustment: 1
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		32.53	
2.	Social Media		32.53	
3.	Canvassing		302.87	
4.	Media		32.53	
5.	Collateral Messaging		162.64	
6.	Group Events		87.46	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			650.56
20 - TOTAL COSTS				
1.	Total Costs			650.56
	Total			650.56
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 02/19/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAP of Kern		Contract Number: 18T-8012	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Tracy Webster / Chief Financial Officer		E-mail Address: twebster@capk.org	Telephone: (661) 336-5236	Fax Number: (661) 325-2169
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		325.28	
2.	Social Media		325.28	
3.	Canvassing		3,028.82	
4.	Media		325.28	
5.	Collateral Messaging		1,626.41	
6.	Group Events		874.56	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			6,505.63
20 - TOTAL COSTS				
1.	Total Costs			6,505.63
	Total			6,505.63
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Emilio Wagner / Director of Operations		Signature:	Date: 01/23/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8002	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	10,250.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	5,000.00
7.	Other 1	15,000.00
8.	Other 2	2,375.00
	Total	32,625.00

20 - TOTAL COSTS

1.	Total Costs	32,625.00
	Total	32,625.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
01/22/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8015	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	1,050.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	625.00
8.	Other 2	.00
	Total	1,675.00
20 - TOTAL COSTS		
1.	Total Costs	1,675.00
	Total	1,675.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
01/22/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8008	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,035.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	15,000.00
8.	Other 2	.00
	Total	20,035.00
20 - TOTAL COSTS		
1.	Total Costs	20,035.00
	Total	20,035.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
02/04/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	sebastien@goldenstateopportunity.org
Contract Number	18T-8008
Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No web expenditures included in Riverside Grant.

2) Provide a narrative of education and outreach activities conducted during the month under web:

N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N/A

Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures for Social Media included in this grant.

2) Provide a narrative of education and outreach activities conducted during the month under social media:

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A

Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Management: \$1,285 (GSO Staff - \$75/H - 17 Hours)
Field Coordinator: \$4,825 (Salary, portion covered through State funds)
Canvassing Total: \$5,560

2) Provide broad overview of canvassing for targeted zip codes:

No canvassing with potential tax filers during this reporting period. The field coordinator is currently organizing partners throughout the county to prepare to reach eligible filers during the 2019 Tax Season.

Also, Field coordinator has worked to hire a grassroots organizer to begin in January.

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners)

Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report at this time. Press/Communications Manager to begin in January. Facebook/Digital Ads to begin running in Late Jan/Early Feb. Ethnic Digital program to also begin later during Tax season.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

N/A

4) Indicate any leveraging of other resources conducted this month in regards to media:

We do not begin our Digital Ad program until new year begins. Although work has already started, such as creating messages, designing graphics and videos, there have been no expenses made.

Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No Expenses for Collateral messaging to report at this time. Only collateral pieces that have been sent out are FTB provided materials, which does not utilize grant funds.

2) Provide a broad overview of flyer/brochure and poster distribution: N/A

3) Provide a listing and narrative of direct mailers that went out:

Direct mailers will be sent out in Early February. We are currently working to design the collateral piece, which will include a message from both FTB and GSO. The goal is to test not only what messaging works best for a Cal EITC specific flyer, but also to test which communicator is most effective. GSO vs FTB.

4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Sub-Grants	3
Narrative of Expenditures in EARS and Outreach Activities	
<p>Sub-Grants - \$15,000 - 3 Grantees awarded \$5,000</p> <p>First grant awarded to TODEC Legal Center - \$10,000 grant, 5,000 in December, \$5,000 in May.</p> <p>Second Grant awarded to Community Action Partnership Riverside - \$10,000 grant, 5,000 in December, \$5,000 in May.</p> <p>Third grant awarded to All of or None \$10,000 grant, 5,000 in December, \$5,000 in May.</p>	

Target Area	6-Riverside
Reporting Period	December 1, 2018 - December 31, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<div style="border: 1px solid black; padding: 5px;"> <p>No Challenges to report at this time</p> </div>	
Narrative of Success Stories	
<div style="border: 1px solid black; padding: 5px;"> <p>No Success stories to report at this time.</p> </div>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8008	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00	
2.	Social Media	.00	
3.	Canvassing	5,035.00	
4.	Media	.00	
5.	Collateral Messaging	.00	
6.	Group Events	.00	
7.	Other 1	15,000.00	
8.	Other 2	.00	
	Total		20,035.00
20 - TOTAL COSTS			
1.	Total Costs		20,035.00
	Total		20,035.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
02/04/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8011	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: N/A	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,035.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	750.00
7.	Other 1	15,000.00
8.	Other 2	.00
Total		20,785.00

20 - TOTAL COSTS

1.	Total Costs	20,785.00
Total		20,785.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
02/04/2019

CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8017	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate		E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		13,000.00	
2.	Social Media		1,500.00	
3.	Canvassing		2,250.00	
4.	Media		.00	
5.	Collateral Messaging		5,000.00	
6.	Group Events		.00	
7.	Other 1		2,000.00	
8.	Other 2		3,758.00	
	Total			27,508.00
20 - TOTAL COSTS				
1.	Total Costs			27,508.00
	Total			27,508.00
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Josh Fryday / President		Signature:		Date: 01/22/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	sebastien@goldenstateopportunity.org
Contract Number	18T-8002
Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

N/A

2) Provide a narrative of education and outreach activities conducted during the month under web:

N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

N/A

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures for Social Media included in this grant.

2) Provide a narrative of education and outreach activities conducted during the month under social media:

N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

N/A

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

LA Program Director: \$6,000 (GSO Staff Salary, portion covered through State funds)
 Grassroots Coordinator: \$3,000 (GSO Staff Salary, [portion covered through State funds)
 Texting Management: \$750 (GSO Staff, 75/H for 10 Hours)
Canvassing Total: \$10,250

2) Provide broad overview of canvassing for targeted zip codes:

Although there are no interactions to report for this month, GSO Program Director and GSO Grassroots coordinator spent the month coordinating partners, and grantees, and planning for 2019.

On December 19, CalEITC4Me Joined Free Tax Prep LA coalition for a collaborative leadership Kickoff. Grassroots organizer conducted a training on all things Cal EITC, including outreach tactics, available tools, new collateral updates, etc)

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018



3) Provide a broad overview of canvassing for non-targeted zip codes:

N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

There have not yet been texts sent out. Texting manager costs include staff time to plan for texting program that will begin in late January/early february. If Cal EITC week falls in late January, the texting program will begin. The Texting manager is working on a Texting guide and Texting Presentation for the trainings in January.

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report at this time. Press/Communications Manager to begin in January. Facebook/Digital Ads to begin running in Late Jan/Early Feb. Ethnic Digital program to also begin later during Tax season.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No Expenses for Collateral messaging to report at this time. Only collateral pieces that have been sent out are FTB provided materials, which does not utilize grant funds.

2) Provide a broad overview of flyer/brochure and poster distribution:

Although there was not any collateral pieces distributed. GSO is working to create event specific flyers for the number of events to come in the LA region.

3) Provide a listing and narrative of direct mailers that went out:

N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
<p> 9:00 am - 2:00 pm Huntington Park VITA - Huntington Park MAOF Saturday, February 16 9:00 am - 2:00 pm Highland Park VITA Highland Park Barrio Action Wed, February 20th 10:00 am-2:00 pm South Los Angeles VITA - South LA WLCAC Saturday, February 23 9:00 am - 2:00 pm Lynwood VITA - Lynwood MAOF Saturday, February 23 9:00 am - 2:00 pm Boyle Heights VITA - Boyle Heights ELACC Friday, February 27 9:00 am - 2:00 pm Central LA VITA - Central LA ELACC & Clinica Romero & CCNP Friday, March 1st 9:00 am - 2:00 pm Antelope Valley VITA - Palmdale MAOF & AVPH & JVH Saturday, March 2 9:00 am - 2:00 pm Antelope Valley VITA - Lancaster MAOF & AVPH Wed, March, 6th 10:00 am- 2:00 pm South LA VITA - South LA WLCAC Saturday, March 9 9:00 am - 2:00 pm SBCC WilmingtonVITA - Wilmington Toberman Neighborhood Center Saturday, March 9 9:00 am - 2:00pm Lincoln HeightsVITA - Lincoln HeightsBarrio Action Friday, March 15 9:00 am -2:00 pm Baldwin Park VITA - Baldwin Park ELACC & El monte Promise Saturday, March 16 9:00 am - 2:00 pm Compton VITA - Compton WLCAC & CUSDSaturday, March 23 9:00 am- 2:00 pm Lincoln HeightsVITA - Lincoln HeightsBarrio Action Saturday, March 23 9:00 am - 2:00 pm El Monte VITA - El MonteEl Monte Promise Foundation & ELACCSaturday, March 23 9:00 am - 2:00 pm Centro ChaVITA - Long Beach Toberman Neighborhood Center Tuesday, March 26 9:00 am - 2:00 pm Central LA VITA - Central LA ELACC & CCNP Tuesday, April 2 9:00 am - 2:00 pm Monterey Park VITA - ELACELACC , MAOF, Eastmont Community CenterSaturday, April 6 9:00am - 2:00pm Long Beach VITA - Long Beach Toberman Neighborhood Center </p>	

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Sub-Grants	2
Admin	0

Narrative of Expenditures in EARS and Outreach Activities

Other 1: Sub-Grants - \$15,000

First sub grant awarded to Mexican American Opportunity Foundation (MAOF). They will receive a grant of 15,000, \$7,500 in December, \$7,500 in May.

Second Sub grant awarded to East LA Community Corporation (ELACC). They will receive a grant of \$15,000, \$7,500 in December, \$7,500 in May.

Grantees will be utilizing funds to support texting program and host events throughout the region.

Other 2: GSO Admin \$2,375.00

GSO admin costs are general operations including completing progress reports, managing grant budgets, maintaining partner relationships, and conducting weekly meetings.

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8002	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	10,250.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	5,000.00
7.	Other 1	15,000.00
8.	Other 2	2,375.00
	Total	32,625.00

20 - TOTAL COSTS

1.	Total Costs	32,625.00
	Total	32,625.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
01/22/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>One challenge is the continued changes to Cal EITC eligibility. Although it is great that more individuals are eligible for the credit in 2019, there are a lot of workers and groups that are unaware of the changes.</p>	
Narrative of Success Stories	
<p>No Success stories to report at this time.</p>	

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	sebastien@goldenstateopportunity.org
Contract Number	18T-8015
Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: N/A**

 - 2) Provide a narrative of education and outreach activities conducted during the month under web: N/A**

 - 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N/A**

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures for Social Media included in this grant.

2) Provide a narrative of education and outreach activities conducted during the month under social media: N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Management: \$1,050 (75/H - 14 Hours)

2) Provide broad overview of canvassing for targeted zip codes: N/A

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

No Texts have been sent out. Texting Management includes planning and preparation for the upcoming texting program that will launch at the end of Jan/Early Feb. We are awaiting text messages sent

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018
<p>texting program that will launch at the end of Jan/Early Feb. We are creating test groups to send specific text messages and analyze the most effective approach. We will randomize the texts to go to different contacts.</p> <p>Potential Tests</p> <p>Treatment 1: Basic Informational Message + Link</p> <p><i>Text 1:</i> Hi-this is Trevor, a volunteer with CalEITC4Me. I'm contacting households who might qualify for a tax refund. Even if you don't owe taxes, you could get cash back by filing a tax return.</p> <p><i>Text 2:</i> Visit caleitc4me.org/earn-it to learn more about your eligibility and to claim your EITC refund.</p> <p>Treatment 2: Promote Hotline</p> <p><i>Text 1:</i> Hi-this is Trevor, a volunteer with CalEITC4Me. I'm contacting households who might qualify for a tax refund. Even if you don't owe taxes, you could get cash back by filing a tax return.</p> <p><i>Text 2:</i> Call 211 to get free help with filing your return and to claim your EITC refund.</p> <p>Treatment 3: Offer Text-based Assistance</p> <p><i>Text 1:</i> Hi-this is Trevor, a volunteer with CalEITC4Me. I'm contacting households who might qualify for a tax refund. Even if you don't owe taxes, you could get cash back by filing a tax return.</p> <p><i>Text 2:</i> Text "yes" and I can help you claim your EITC refund.</p> <p>5) Provide broad overview of Phone Calls conducted: N/A</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners)</p>	

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report at this time. Press/Communications Manager to begin in January. Facebook/Digital Ads to begin running in Late Jan/Early Feb. Ethnic Digital program to also begin later during Tax season.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 No expenses for collateral messaging to report.

2) Provide a broad overview of flyer/brochure and poster distribution: N/A

3) Provide a listing and narrative of direct mailers that went out: N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Admin costs	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>GSO Admin: \$625</p> <p>GSO admin costs are general operations including completing progress reports, managing grant budgets, maintaining partner relationships, and conducting weekly meetings. Specifically, working with co-grantee ATCAA to coordinate our plans.</p> <p>We meet at least once a month with ATCAA to plan out the next month, and coordinate on events. This month we discussed the best way to reach universities and community colleges in the Rural regions, and picked target colleges that we want to do outreach to.</p> <p>We are also coordinating on the Bus tour that ATCAA will conduct during tax season. We are allocating resources to have each group focus on specific counties.</p>	

Target Area	14-Rural
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

Narrative of Success Stories

Success Story #1
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #2
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #3
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	sebastien@goldenstateopportunity.org
Contract Number	18T-8011
Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: N/A**

 - 2) Provide a narrative of education and outreach activities conducted during the month under web: N/A**

 - 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N/A**

Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A		N/A	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 No expenditures for Social Media included in this grant.

2) Provide a narrative of education and outreach activities conducted during the month under social media: N/A

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A

Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Management: \$750 (GSO Staff - \$75/H - 17 Hours)
 Field Coordinator: \$4,285 (Salary, portion covered through State funds)
Canvassing Total: \$5,035

2) Provide broad overview of canvassing for targeted zip codes:

No interactions with potential tax filers during this reporting period. The field coordinator is currently organizing partners throughout the county to prepare to reach eligible filers during the 2019 Tax Season.

Working with Time for Change Foundation on door-to-door program. Time for change will be helping to distribute FTB and CalEITC4Me materials during the tax season.

Working with Congregations for Prophetic Engagement to create a texting program to reach their members.

Also, Field coordinator has worked to hire a grassroots organizer that will begin in January. Coordinator has created application, conducted interviews, and will be making a final decision before the new year.

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: N/A

Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report at this time. Press/Communications Manager to begin in January. Facebook/Digital Ads to begin running in Late Jan/Early Feb. Ethnic Digital program to also begin later during Tax season.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No Expenses for Collateral messaging to report at this time. Only collateral pieces that have been sent out are FTB provided materials, which does not utilize grant funds. GSO is currently working on finalizing all CalEITC informational flyers as well as Event flyers for the San Bernardino Region.

2) Provide a broad overview of flyer/brochure and poster distribution: N/A

3) Provide a listing and narrative of direct mailers that went out:

No Direct Mail program planned for SB.

4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A

Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Sub-Grants	3
Narrative of Expenditures in EARS and Outreach Activities	
<p>Sub-Grants - \$15,000 - 3 Grantees awarded \$5,000</p> <p>First grant awarded to Time of Change Foundation - \$10,000 grant, 5,000 in December, \$5,000 in May.</p> <p>Second Grant awarded to Congregations for Prophetic Engagement - \$10,000 grant, 5,000 in December, \$5,000 in May.</p> <p>Third grant awarded to Sigma Beta XI - \$10,000 grant, 5,000 in December, \$5,000 in May.</p>	

Target Area	9-San Bernardino
Reporting Period	December 1, 2018 - December 31, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>San Bernardino is a vey large and spread out County. A challenge is ensuring every part of the county has the resources to claim the Cal EITC.</p>	
Narrative of Success Stories	
<p>No Success stories to report at this time.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn	Contract Number: 18T-8011	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: N/A

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00
2.	Social Media	.00
3.	Canvassing	5,035.00
4.	Media	.00
5.	Collateral Messaging	.00
6.	Group Events	750.00
7.	Other 1	15,000.00
8.	Other 2	.00
	Total	20,785.00

20 - TOTAL COSTS

1.	Total Costs	20,785.00
	Total	20,785.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Josh Fryday / President

Signature:

Date:
02/04/2019

CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Golden State Opportunity
Grantee Representative	Sebastien Chaubard
Telephone Number	510-468-0872
Email Address	sebastien@goldenstateopportunity.org
Contract Number	18T-8017
Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	12,179

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Website Management and Updates: \$4,500 (GSO Staff Time - \$75/H - 60 Hours)
 Website Calculator: \$2,500
 Website Free Tax Prep. Map: \$5,000
 New Pages: \$1,000
Website Total: \$13,000

2) Provide a narrative of education and outreach activities conducted during the month under web:

Website Management and Updates:
 The website is currently under construction with the goal of having all updates completed by the end of January, in preparation for the beginning of tax season. A list of website changes and updates include:

- Know it Page: Updated all content to reflect 2018 Tax eligibility
- Partners page (will create new partners page to focus on spreading resources and getting more partners to use toolkits)
- Website Calculator - Working with Intuit and getting new code so that the calculator is updated with new eligibility requirements. To Be updated in early Jan.
- Free Tax Prep Tool - Waiting on list of VITA locations from FTB/IRS. Also working on adding additional information to the tool such as events near you.
- Sign Up page - Updated the sign up page to collect data and send to new database.
- Know it Page - Updated with all new Cal EITC eligibility updates
- Earn It Page - Working on updated the calculator, and "Email my results tool" to capture data and follow up with those eligible
- Self-employed page - Updated content and language

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
<p>-Self-employed page - Updated content and language</p> <p>-Yong Adults Page - Finalizing content, page to be operating by end of Dec.</p> <p>-Older Adults Page - Finalizing messaging, page to be operating by end of Dec.</p> <p>-Spanish Microsite - Working on translations, based on content updates to English pages</p> <p>-Mandarin Microsite - Working on translations, based on content updates to English Pages</p> <p>3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:</p> <p>Government Shutdown may cause delays in Free Tax Prep locator to be completed and go live on CalEITC4Me.Org</p>	

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	17	Number of Tweets	6
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
It's time to #EndChildPoverty! Our President Josh Fryday joined End Child Poverty CA today in Sacramento to lend our voice on the importance of this issue - 9 out of 10 #CalEITC dollars go to families with children! Help children in poverty by spreading the word about Cal EITC 4 Me		We believe that all Californians who work should be able afford life's basic needs and 2019 is time for bold action to achieve that mission. By greatly expanding the #CalEITC we can give more a cost-of-living refund. Retweet if you agree!	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Social Media Content Development: \$1,500 (GSO Staff - 75/H - 20 Hours)

2) Provide a narrative of education and outreach activities conducted during the month under social media:

GSO social media manager posted 17 times to Facebook and 6 posts on Twitter. Most of the posts centered around the events that CalEITC4Me participated in or hosted. There were also many posts about articles or news about poverty of the EITC . Please view some examples below:

Facebook Posts on Dec. 3

It's time to [#EndChildPoverty!](#) Our President [Josh Fryday](#) joined [End Child Poverty CA](#) today in Sacramento to lend our voice on the importance of this issue - 9 out of 10 [#CalEITC](#) dollars go to families with children! Help children in poverty by spreading the word about [Cal EITC 4 Me](#)

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:



Tweet on Fec. 4

Great day today joining [@calassets](#) at their 7th Annual [#AssetsMatter2018](#) in Fresno! Thank you for having us and for the opportunity to talk about the more than 1.4 million Californians who have claimed [#CaIEITC](#) this year and what next year holds!



Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Texting Management: \$2,250 - GSO Staff Time - \$75/H - 30 Hours

2) Provide broad overview of canvassing for targeted zip codes:

N/A

3) Provide a broad overview of canvassing for non-targeted zip codes:

N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

Text messages have not been sent out, Texting manager worked on cutting the lists for the Statewide counties that will be texted, and working on drafting messages to be send out starting in early Feb. Texting manager also worked on creating a texting guide and texting presentation for upcoming Texting Trainings. First two texting training session to happend on Jan. 16 and 17.

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:

N/A

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

No expenditures to report at this time. Press/Communications Manager to begin in January. Facebook/Digital Ads to begin running in Late Jan/Early Feb. Ethnic Digital program to also begin later during Tax season.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

N/A

4) Indicate any leveraging of other resources conducted this month in regards to media:

N/A

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Collateral Content Development: **\$5,000**

2) Provide a broad overview of flyer/brochure and poster distribution:

No collateral pieces have been distributed besides the FTB materials, we are not counting FTB materials since it is not funding through State grant.

Expenditures include GSO staff time, and costs for translations. During the December grant period, we have created three collateral pieces for the beginning of the year. The collateral pieces include:

- Cal EITC eligibility flowchart
- Benefits Checklist
- Benefits Wheel

Also, we are working with partner organization Earn to collaborate on specific collateral pieces. Earn is a national non-profit who works to create prosperity for working families by helping them save and invest in their futures.

We are collaborating with them to put an "EARN" button in hopes to get EITC recipients to invest their EITC dollars.

We have also created a new five digit text keyword to our collateral pieces.

3) Provide a listing and narrative of direct mailers that went out:

N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources:

N/A

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Texting Training	0
GSO Admin	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>Other 1: Texting Training: \$2,000 Other 2: GSO Admin: \$3,758</p> <p>Although there have yet to be an texting training hosted by CalEITC4Me at this time. The expenditures listed above includes GSO staff time to coordinate and plan the upcoming trainings in January. There are currently 14 groups that have RSVP and will attend first training session.</p> <p>GSO admin costs are general operations including attending SIT meetings, completing progress reports, managing grant budgets, maintaining partner relationships, and conducting weekly meetings.</p>	

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>The Government shutdown has slowed down the process to complete our VITA/Free Tax Locator tool on our website.</p>	
Narrative of Success Stories	
<p>No Success stories to report at this time.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Koreatown Youth & Comm Ctr Inc		Contract Number: 18T-8003	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Lidia Sebastian / Cal EITC Program Monitor	E-mail Address: lsebastian@kyccla.org	Telephone: 213-365-7400 ex	Fax Number: 213-927-0017	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	1,332.10
2.	Social Media	1,332.10
3.	Canvassing	1,332.10
4.	Media	1,332.10
5.	Collateral Messaging	6,332.10
6.	Group Events	1,332.12
7.	Other 1	.00
8.	Other 2	.00
Total		12,992.62
20 - TOTAL COSTS		
1.	Total Costs	12,992.62
Total		12,992.62

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Audrey Casillas / Economic Development
Coordinator

Signature:

Date:
01/18/2019

CSD ACCOUNTING USE ONLY

Payment: _____ PCA# _____

Approved By: _____ Date: _____

**2018 Cal EITC Education and Outreach Grant Monthly
 Progress Report**

Grantee Organization Name	Koreatown Youth and Community Center
Grantee Representative	Audrey Casillas
Telephone Number	213-365-7400 ext 5235
Email Address	Acasillas@kyccla.org
Contract Number	181-8003
Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	1,652

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

During this period, the current Web expenditure was **\$1,332.10** for the month of December. The expenditure (\$1,332.10) was for administering web hits by the lead agency.

2) Provide a narrative of education and outreach activities conducted during the month under web:

Information on tax preparation services, tax credits, and logos have been inserted onto each partner's website (20 websites). Clients view contact information for tax services at the location to obtain free tax help. Logos are also linked to www.freetaxprepla.com to provide additional information about the collaborative, link to Cal EITC calculator and other Cal EITC resources, and information about all the available tax centers in the county.

United Way of Greater Los Angeles worked with the Los Angeles area Internal Revenue service to develop update geo/map tool to locate tax sites by zip code and provide online booking, site hours, and contact information for sites and special tax events in 2019.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

Unpaid partner include United Way of Greater Los Angeles, LA County Department of Business and Consumer Affairs, City of Los Angeles Housing, Community and Investment Department, City of Los Angeles Public Library, Building Skills Partnership, Children's Bureau, etc. also have Free Tax Prep Los Angeles linked logo inserted onto their tax services webpage.

Target Area	1-Los Angeles		
Reporting Period	December 1, 2018 - December 31, 2018		
Social Media			
Number of Facebook Posts	66	Number of Tweets	101
Exact Messaging of Most-Liked Facebook		Exact Messaging of Most-Favorited Twitter Post	
#VITA provides a safe, honest service that saves families and the IRS lots of money. Consider becoming a #FreeTaxPrepLA volunteer to support #workingfamilies.		LIVE: @deenamarg of @LAUnitedWay opening the @FreeTaxPrepLA convening this morning. Many community groups looking to promote #VITA & #CalEITC! pic.twitter.com/zkZgBxARtR	
Number of Other Posts (Instagram, etc.)	3	Exact Messaging of Most-Liked "Other" Post	
		Take advantage of free, quality tax services! Avoid the high cost of tax preparation by having your taxes prepared by All Peoples Community Center ... #FreeTaxPrepLA #EITC	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: During this period, the current Social Media expenditure was \$1,332.10 for the month of December. The expenditure (\$1,332.10) was for administering outreach by the lead agency.</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media: Social media calendars were developed and shared with subagencies. Social media calendars were also translated into English, Spanish, Korean, and Armenian. The December social media messages focused on volunteer recruitment, information on the expanded EITC, and VITA services. Additionally, an abbreviated social media calendar was developed to share with partners.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: Social Media calendars were shared with City of Los Angeles Housing and Community Investment Department, LA County Department of Consumer and Business Affairs, and Flrst 5 Los Angeles.</p>			

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	45
Office Visits	2,398

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: During this period, the current Canvassing expenditure was **\$1,332.10** for the month of December. The expenditure (\$1,332.10) was for administering outreach by the lead agency.

2) Provide broad overview of canvassing for targeted zip codes: Customers receive individual screening for services at all Free Tax Prep LA subagencies. **588** Individuals that learned about the Federal EITC, Cal EITC expansion, and VITA services in the targeted zip codes. At the time of screening, individuals must provide proof of household income, proof of residency, and meet with a case manager one-on-one. This provides the personal interaction with individuals with low-incomes. Each individual also received a flyer for Free Tax Prep LA services.

3) Provide a broad overview of canvassing for non-targeted zip codes: Customers receive individual screening for services at all Free Tax Prep LA subagencies. **1,810** Individuals that learned about the Federal EITC, Cal EITC expansion, and VITA services in non-targeted zip codes. Nonetheless all clients served are low-to moderate income.

Data is captured in the City of Los Angeles HMIS database on all clients who enroll, signatures on all information shared at the one-on-one orientation are also stored on-site. Individuals enrolled are also notified by mail and text message at a later time when large events and the start of tax season.

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A

5) Provide broad overview of Phone Calls conducted: Calls were not conducted this month. However clients interested in booking a VITA tax appointment call into our center and first hear an automated message about the EITC, Cal EITC expansion, and VITA services. In December there were **45** callers who left messages.

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners)

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:** During this period, the current Media expenditure was **\$6,332.10** for the month of December. The expenditure (\$1,332.10) was for administering outreach by the lead agency. An additional \$5,000 was to pay for the design costs.
- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:** During the month of December all the content for web ads, transit ads, wall ads, and social media boosts were finalized. The Free Tax Prep LA committee finalized the new designs and marketing plan geared towards college aged students. Also, early planning for the January/February press event started in December. No outreach in media was performed.
- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:** N/A
- 4) Indicate any leveraging of other resources conducted this month in regards to media:** The County of Los Angeles Department of Business and Consumer Affairs and the City of Los Angeles Department of Public Works have confirmed the donation of 275 transit ads on buses, bus benches, and shelters. Negotiations are final and ads will go out in Mid-January to April.

Target Area	1-Los Angeles	
Reporting Period	December 1, 2018 - December 31, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	0
	Number of New Individuals who Received Direct Mailers	0

1) List the various activity-expenditures charging for this month and their cost: During this period, the current Collateral expenditure was **\$1,332.10** for the month of December. The expenditure (\$1,332.10) was for administering outreach by the lead agency.

2) Provide a broad overview of flyer/brochure and poster distribution: Flyers for FTPLA collaborative were finalized. Within the month of December, FTPLA steering committee will co-brand with Golden State Opportunity, YPI, and CSU5 collaboratives to broaden the familiarity of CalEITC and VITA across grantees. Flyers are branded with larger campaign (transportation ads, banners, window stickers, wall ads, social media, and internet ads).

Over 6,000 flyers were shared within all the subagency (18 total) members by direct office visits and community events. Flyers were shared in 3 languages (Korean, Spanish, and English) and more translations to follow in January.

3) Provide a listing and narrative of direct mailers that went out: N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Group Events

Total Number of Events Held During the Reporting Period			16	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	90007	12/13/18	126	No
Community Gathering	90011	12/14/18	487	No
Community Gathering	90007	12/20/18	1000	No
Community Gathering	90032	12/20/18	900	No
Community Gathering	90005	12/08/18	2000	No
Resource Fair	90044	12/15/18	375	No
Community Gathering	90026	12/03/18	50	No
Community Gathering	90026	12/04/18	50	No
Community Gathering	90020	12/04/18	22	No
Community Gathering	90020	12/05/18	24	No
Community Gathering	90020	12/11/18	18	No
Community Gathering	90020	12/13/18	20	No
Resource Fair	90007	12/08/18	440	No
Community Gathering	90015	12/18/18	58	No
Community Gathering	90004	12/14/18	35	No
Community Gathering	90015	12/14/18	5	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: During this period, the current Socail Media expenditure was **\$1,332.12** for the month of December. The expenditure (\$1,332.10) was for administering outreach by the lead agency.

2) Provide a brief overview of events conducted during the reporting period: Free Tax Prep LA hosted 6 events solely focused on presenting VITA, EITC, and Cal EITC. The first presented to nonprofit leaders, government agency representatives, and staffers for local elected officials. The later 2 were presentations with Los Angeles City College and Los Angeles Trade Tech Community College with faculty and professors. Finally, 4 events were held at financial institutions to promote EITC awareness, volunteer engagement and partnership for the upcoming tax season.

In the month of December suagencies reported outreach events targeted to low-income residents of Los Angeles, such as holiday toy and food distribution, bus token and diaper giveaway events, and service provider presentations. In one example, the families waiting in line for a toy distribution event were provided a canvas bag with flyers about VITA/EITC and staff announced the information. In the event, there was a resource booth collecting names and phone numbers of inviduals interested in more information - the table collected 384 names and cell phone numbers for a January text message.

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
<p>In total, 5,610 individuals were reached by the group events. Each individual benefiting from a group event enrolls, provides proof of income and residency, and receives a list of programs and services provided by the host.</p> <p>Sub agencies also reported the month of December was used to reestablish partnerships with partners, including LA City Community Colleges, LA Unified School District Schools, Clinics, and Food Banks.</p> <p>3) If members of the press attended an event, indicate which press outlets: N/A</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: N/A</p>	

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

Narrative of Success Stories

Success Story #1
 Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2
 Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3
 Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Koreatown Youth & Comm Ctr Inc		Contract Number: 18T-8003	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Lidia Sebastian / Cal EITC Program Monitor	E-mail Address: lsebastian@kyccla.org	Telephone: 213-365-7400 ex	Fax Number: 213-927-0017	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	1,332.10
2.	Social Media	1,332.10
3.	Canvassing	1,332.10
4.	Media	1,332.10
5.	Collateral Messaging	6,332.10
6.	Group Events	1,332.12
7.	Other 1	.00
8.	Other 2	.00
Total		12,992.62
20 - TOTAL COSTS		
1.	Total Costs	12,992.62
Total		12,992.62

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Audrey Casillas / Economic Development
Coordinator

Signature:

Date:
01/18/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Orange County United Way		Contract Number: 18T-8009	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Maria Mugica / Cal EITCED&OutreachCoord		E-mail Address: MariaM@UnitedWayOC.org	Telephone: 949-477-4506	Fax Number: 949-271-8002
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	3,000.00		
2.	Social Media	500.00		
3.	Canvassing	6,000.00		
4.	Media	2,474.10		
5.	Collateral Messaging	474.10		
6.	Group Events	3,842.75		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	16,290.95		
20 - TOTAL COSTS				
1.	Total Costs	16,290.95		
	Total	16,290.95		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Ann Truxaw-Ramirez / Grants/Proposal Development Manager		Signature:	Date: 01/22/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	Orange County United Way
Grantee Representative	Maria Mugica
Telephone Number	949-263-6102
Email Address	MariaM@UnitedWayOC.org
Contract Number	18T-8009
Target Area	7-Orange
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	1377

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Web Updates (**\$3000**)

2) Provide a narrative of education and outreach activities conducted during the month under web:

Sefati Consulting continued to update OC Free Tax Prep microsite including Spanish translation. OCUW digital team continued to update tax related pages

Orange County United Way (OCUW) OC Free Tax Prep program oversees two tax related websites.
OCUW Tax related pages **654** web hits
<https://www.unitedwayoc.org/changing-lives/income/free-tax-preparation/>
<https://www.unitedwayoc.org/changing-lives/income/free-tax-preparation/earned-income-tax-credits/>
<https://www.unitedwayoc.org/changing-lives/income/free-tax-preparation/vita-volunteer/>
OC Free Tax Prep (English and Spanish) **723** web hits
<https://www.ocfreetaxprep.com/>

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

The EITC Website hits are accurately reflecting all tax related pages for the OC Free Tax Prep campaign and program. The pages were near 100% completion by the end of December while continuing to be refined through January. The digital ad campaign scheduled to begin at the end of January will increase the number of website hits considerably.

Social Media

Target Area	7-Orange		
Reporting Period	December 1, 2018 - December 31, 2018		
Number of Facebook Posts	34	Number of Tweets	11
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
We need YOU! It's not too late to join our team of 500 IRS-certified Volunteer Income Tax Assistance (VITA) volunteers. Roles include: Greeter, Tax Preparer, Knowledge Expert/Quality Reviewer, Interpreter, and Tax Guide. Learn more: https://bit.ocuw.org/2QFjoRH . #OCFreeTaxPrep		Volunteer Income Tax Assistance (VITA) volunteers are helping change their communities for the better. Providing free tax return assistance can help low-income families get extra cash to cover rent and utility bills. Learn more: https://bit.ocuw.org/2AMQskc . #VITA #CalEITC	
Number of Other Posts (Instagram, etc.)	32	Exact Messaging of Most-Liked "Other" Post	
		unitedwayoc Join a diverse team of tax-focused volunteers to help working families get their hard-earned refunds while gaining quality skills and experiences. Learn more about the unique Volunteer Income Assistance (#VITA) Program through our #OCFreeTaxPrep Campaign (link in bio).	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Content and Posting (**\$500**)

2) Provide a narrative of education and outreach activities conducted during the month under social media:

OCUW digital marketing team updating graphics and content while posting on 3 OCUW platforms- Facebook, Twitter and Instagram. OCUW social media calendar is informed by United Ways of California's social media toolkit, to ensure statewide and trusted messaging.

OCUW (25 FB) (7 Tweets) (31 Instagram)
CHIOC (4 FB)
SOS (2 FB) (4 Tweets) (1 Instagram)
CAPOC (3 FB)

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

OCUW shares a monthly calendar with our sub-grantee partners who post consistent EITC messaging

Canvassing

Target Area	7-Orange	
Reporting Period	December 1, 2018 - December 31, 2018	
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	
	Canvassing in Non-Targeted Zip Codes	
	New Individuals Who Received Text Messages	
	Phone Calls	
	Office Visits	32
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: Payment to three Sub-grantees specific to CalEITC Education and Outreach Activities (\$6,000) See narrative below.</p> <p>2) Provide broad overview of canvassing for targeted zip codes: Sub-grantees plan strategic launch for January upon receipt of collateral.</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: Sub-grantees plan strategic launch for January upon receipt of collateral.</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: OCUW Texting Campaign to launch in January</p> <p>5 a) Provide broad overview of Phone Calls conducted: NA</p> <p>5 b) Provide broad overview of Office Visits conducted: SOS 32 Clients who met with staff or a volunteer to obtain services from organization were provided with a CalEITC flyer. This included clients within target zip code 92627 and surrounding city of Costa Mesa.</p> <p>6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: Please see Canvassing Narrative Continued under OTHER.</p>		
Media		

Target Area	7-Orange			
Reporting Period	December 1, 2018 - December 31, 2018			
Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	4	15,117		
Paid Radio Ads				
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads				
Narrative of Expenditures in EARS and Outreach Activities				
<p>1) List the various activity-expenditures charging for this month and their cost: Digital Ad Spend (\$2000) Design/update of Transportation advertising (\$474.10). For a total \$2474.10</p> <p>2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:</p> <p>Digital ad campaign to launch mid-late January. Impressions will be reported in February from January launch.</p> <p>3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:</p> <p>OCUW continues to have success with earned media related to VITA volunteer recruitment and OC Free Tax Prep. Articles attached with progress Report.</p> <p>12/13/18 Patch 418,500 views/month (387 Impressions/day) 12/13/18 Orange County Breeze 25,300 views per month (843 Impressions/day) 12/18/18 Daily Pilot 418,500 views per month (13,500 Impressions/day) 12/18/18 Stu News Newport 12,000 views per month (387 Impressions per day)</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media:</p> <p>OCUW working with digital ad company. Currently updating, creating content and graphics for strategic January launch of paid Facebook and Google AdWords. OCUW radio and Transportation advertising to launch a the end of January. PSA for Laguna Woods Scheduled for 1/26.</p>				
Collateral Messaging				
Category			Metrics	

Target Area	7-Orange			
Reporting Period	December 1, 2018 - December 31, 2018			
Number of Flyers/Brochures Distributed			375	
Number of New Individuals who Received Direct Mailers				
Narrative of Expenditures in EARS and Outreach Activities				
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Design/update of Community Flyer and street marketing collateral (\$474.10)</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>OCUW 12/11 Resource Fair 52 Flyers distributed 12/14 Resource Fair 47 Flyers Distributed SOS 12/21,26,27,28 Food Bank 276 Flyers distributed</p> <p><u>See distribution narrative under Group Events</u></p> <p>3) Provide a listing and narrative of direct mailers that went out: NA</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources:</p> <p>12/15 CHIOC sent out an email promoting CalEITC and Free Tax services to an email list of local partners. The email went out to 207 people and of those, 32 people opened the email and 3 links were clicked.</p> <p>OCUW updated design, messaging and translation of flyers, postcards, posters and sent to print December for January roll out. Community flyer translated into Spanish, Korean, Vietnamese, and Farsi. 40,000 printed materials in production. Additionally, 15,000 CalEITC brochures arrived from Franchise Tax Board. 10/23 CSD approved materials via email.</p>				
Group Events				
Total Number of Events Held During the Reporting Period			6	
Location	Zip Code	Date	Attendance	Press at Event?

Target Area	7-Orange			
Reporting Period	December 1, 2018 - December 31, 2018			
Resource Fair	92627	12/11/18	70	No
Resource Fair	92701	12/14/18	200	No
Food Bank	92627	12/21/18	100	No
Food Bank	92627	12/26/18	50	No
Food Bank	92627	12/27/18	56	No
Food Bank	92627	12/28/18	70	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 CalEITC Education and Outreach Coordinator (**\$2038.75**) OC Free Tax Prep Project Coordinator (**\$1804**)
 For a **total \$3842.75**

2) Provide a brief overview of events conducted during the reporting period:

OCUW

12/11 Resource Fair

CalEITC Education and Outreach Coordinator hosted a table at the Melinda Hoag Smith Center. Overall attendance was 70 with about 14 participants stopping at the booth and receiving CalEITC flyers downloaded from the FTB website. We were also promoting free tax prep services that will be held at that location. The center serves many low-income individuals and families from the target zip code 92627 in Costa Mesa. A total of 9 CalEITC and 43 Free Tax Service flyers (English and Spanish) got distributed to participants.

12/14 Resource Fair

CalEITC Education and Outreach Coordinator hosted a table at the Santa Ana Mexican Consulate. Overall attendance was 200 with about 29 participants stopping at the booth and receiving CalEITC flyers downloaded from the FTB website. We were also promoting free tax prep services that will be held at that location. The center serves many individuals and families from the target zip code 92701 in Santa Ana. A total of 17 CalEITC and 30 Free Tax Service flyers (English and Spanish) got distributed to participants.

SOS

12/21,26,27,28 Food Bank

Clients came to pick up a bag of food and they were provided with a CalEITC/Free Tax Prep flyer inside their bag or at the front desk counter when they filled out a registration slip.

The center serves many low-income individuals and families from the target zip code 92627 in Costa Mesa.

3) If members of the press attended an event, indicate which press outlets: NA

4) Any other additional information pertinent to work conducted, including leveraging of other

Other

Category	Actual (#)
----------	------------

Target Area	7-Orange
Reporting Period	December 1, 2018 - December 31, 2018

Narrative of Expenditures in EARS and Outreach Activities

Canvassing Continued

OCUW finalized sub-grantee partners for specific CalEITC canvassing, education and outreach activities in the following target zip codes:

Sub-grantee canvassing and overall outreach planned for January upon receipt of collateral materials.

Community Health Initiative of Orange County (CHIOC) \$1500

92701 and the surrounding City of Santa Ana including phone calls and office visits

In the month of December CHIOC CalEITC coordinators updated website, posted social media, sent CalEITC/Free Tax Prep Email to 207 subscribers and created strategic plan for outreach.

Community Action Partnership of Orange County (CAPOC) \$1500

92683, 92804 and the surrounding cities of Westminster and Anaheim

In the month of December, CAPOC Director overseeing CalEITC, recruited and hired EITC outreach coordinator. They were able to post **social media** on their channels.

Share Our Selves (SOS) \$3000

92627 and the surrounding city of Costa Mesa

In the month of December, CalEITC coordinator posted social media, printed materials, coordinated food bank event and created strategic plan for outreach. SOS also began adding CalEITC and Free Tax Prep flyers during 1:1 client **Office Visits**

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Target Area	7-Orange
Reporting Period	December 1, 2018 - December 31, 2018

We will be able to provide success stories after we start the tax season. February 2019, tax sites are in full operation Through April 15th.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Orange County United Way		Contract Number: 18T-8009	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Maria Mugica / Cal EITCED&OutreachCoord		E-mail Address: MariaM@UnitedWayOC.org	Telephone: 949-477-4506	Fax Number: 949-271-8002
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	3,000.00		
2.	Social Media	500.00		
3.	Canvassing	6,000.00		
4.	Media	2,474.10		
5.	Collateral Messaging	474.10		
6.	Group Events	3,842.75		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	16,290.95		
20 - TOTAL COSTS				
1.	Total Costs	16,290.95		
	Total	16,290.95		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Ann Truxaw-Ramirez / Grants/Proposal Development Manager		Signature:	Date: 01/22/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way Bay Area
Grantee Representative	Colleen Smallfield
Telephone Number	415-808-4428
Email Address	csmallfield@uwba.org
Contract Number	18T-8005
Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	4

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 The total December web costs for Alameda and Santa Clara counties were \$562.06 for staff, including salaries, rent costs, and connectivity for those staff, as well as a 7% Admin Fee to cover costs of our support team.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 This month, we updated all of our client facing pages including our client EITC info page, and map and flyers for clients to find tax sites. The map and flyers are continually updated throughout the season but there is a large push to verify and update data in December. We had 4 visits to our Cal EITC specific page and 10,723 to the entire site regionally.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 N/A

Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	9	Number of Tweets	10
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Our #volunteers are excited to help hard working filers access the #taxcredits they deserve. Sign up and be a part of it! https://volunteer.uwba.org/eks-volunteer		In honor of #InternationalChildrensDay we wanted to celebrate the way the #EITC and the #CTC fights poverty for families filing with #children We'd love for you to join our fight on poverty	
Number of Other Posts (Instagram, etc.)	3	Exact Messaging of Most-Liked "Other" Post	
		Are you looking for an opportunity for #SpringSemester? Look no further! #volunteer with us to become an #IRS certified tax preparer. Learn more here: https://lnkd.in/gBQADkk #finance #career #tax #Jobs #Resume	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
The total cost for this month was \$586.76 staff costs, and 7% Admin Fee, including rent and connectivity for those working on social media and support staff.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
This month, we devoted substantial social media space to volunteer outreach, which has also been helpful when we target young people as many of them may be able to both volunteer and access the Cal EITC for the first time this year. We also work with United Ways of California to align our messaging to other important hashtags or movements that are happening online.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:
N/A

Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
While we did not begin canvassing this month, we did dedicate staff time to coordinating our plans with subcontractors and partners. Total costs were \$889.71 in staff and Administrative costs.

2) Provide broad overview of canvassing for targeted zip codes:
While we did not start canvassing this month, we had many strategic planning meetings and we are looking forward to getting our campaigns started!

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: N/A

Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 We dedicated significant staff time to media planning and also made payments for ads starting in January. Total staff costs were \$1,259.89 and we also paid \$387.16 for Facebook ads, as well as \$115.29 in Administrative Costs. The total media costs for December were \$1,762.35.

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	10,500
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
Total costs included staff time, rent, and connectivity, which were \$667.17. We also paid for printing costs for our Alameda County-specific event collateral (\$1079.51). Other costs included administrative costs at 7%. The total cost for December in Collateral Messaging was \$1,868.95.

- 2) Provide a broad overview of flyer/brochure and poster distribution:
Along with distributing materials to our sites in Santa Clara and Alameda counties, we also distributed postcards to two new partners in Santa Clara County, including the central San Jose Library system and San Jose Senior Centers. We also created a new Alameda County-specific postcard and gave out more than 4,500 at our event with First 5 and the City of Oakland in Alameda.

- 3) Provide a listing and narrative of direct mailers that went out: N/A

- 4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A

Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<div style="border: 1px solid black; min-height: 300px; padding: 5px;"> <p>N/A</p> </div>	

Target Area	3-Alameda/Santa Clara
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

This month we faced few challenges, other than being busy! We were able to coordinate with subcontractors and partners in both counties, as well as other CSD grantees, to put good plans in place to implement in 2019!

Narrative of Success Stories

Success Story #1
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #2
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

Success Story #3
Date of Success Story:
Name of Person from Success Story:
Zip-Code Where Person Lives:
VITA Site where person got taxes done (if applicable):
Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8005	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Colleen Smallfield / Director, EKS	E-mail Address: csmallfield@uwba.org		Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		562.06	
2.	Social Media		586.76	
3.	Canvassing		889.71	
4.	Media		1,762.35	
5.	Collateral Messaging		1,868.95	
6.	Group Events		342.05	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			6,011.88
20 - TOTAL COSTS				
1.	Total Costs			6,011.88
	Total			6,011.88
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Contract and Grant SD		Signature:		Date: 02/08/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way Bay Area
Grantee Representative	Colleen Smallfield
Telephone Number	415-808-4428
Email Address	csmallfield@uwba.org
Contract Number	18T-8006
Target Area	4-San Francisco/San Mateo
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	2

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Web costs for December included staff salaries, rent, and connectivity for staff working on website updates, as well as administrative costs. The total cost was \$260.26.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 We had 2 visits to our Cal EITC specific page and 10,723 to the entire site regionally.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 N/A

Target Area	4-San Francisco/San Mateo
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	9	Number of Tweets	10
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Our #volunteers are excited to help hard working filers access the #taxcredits they deserve. Sign up and be a part of it! https://volunteer.uwba.org/eks-volunteer		In honor of #InternationalChildrensDay we wanted to celebrate the way the #EITC and the #CTC fights poverty for families filing with #children We'd love for you to join our fight on poverty	
Number of Other Posts (Instagram, etc.)	3	Exact Messaging of Most-Liked "Other" Post	
		Are you looking for an opportunity for #SpringSemester? Look no further! #volunteer with us to become an #IRS certified tax preparer. Learn more here: https://lnkd.in/gBQADkk #finance #career #tax #Jobs #Resume	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Social media costs included staff salary, rent, and connectivity for staff working on social media, as well as administrative costs. The total cost was \$271.70.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 This month, we devoted substantial social media space to the recruitment of volunteers, which relates to the Cal EITC because many of our volunteers are motivated to provide big returns to their clients! We also directed much social media toward college students, who we hope will both volunteer and also access the Cal EITC based on the new eligibility parameters. Finally, we always coordinate with United Ways of California to also promote shared messaging.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

Target Area	4-San Francisco/San Mateo
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 We dedicated significant staff time to planning and coordinating with our canvassing partners. The total cost, including salaries, rent, and connectivity, as well as administrative costs, was \$411.97.

2) Provide broad overview of canvassing for targeted zip codes: We did not begin canvassing in San Mateo or San Francisco but did start the planning process both with Golden State Opportunity Fund and Community Connect Labs so we will be ready before the season begins!

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: N/A

Target Area	4-San Francisco/San Mateo
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
This month, costs included both staff costs and purchases for Facebook ads. The total staff costs were \$583.39 and Facebook costs (for ads to begin in January) were \$179.27. The total cost, including support costs, was \$816.05.
- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A
- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A
- 4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	4-San Francisco/San Mateo	
Reporting Period	December 1, 2018 - December 31, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	1,500
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: For San Francisco and San Mateo counties, the total collateral messaging costs included staff salaries, rent, and connectivity, as well as administrative costs, which was a total of \$330.55.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: This month, we distributed flyers to a majority of our SF and San Mateo sites, and many have posted signage and started distributing flyers and postcards to clients!</p> <p>3) Provide a listing and narrative of direct mailers that went out: N/A</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A</p>		

Target Area	4-San Francisco/San Mateo
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<div data-bbox="170 562 227 594" data-label="Text"> <p>N/A</p> </div>	

Target Area	4-San Francisco/San Mateo
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

This month we faced few challenges. We were able to work with our internal marketing team to get plans set for 2019 and were able to meet with sites and provide all needed collateral materials.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8006	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Colleen Smallfield / EKS, Director		E-mail Address: csmallfield@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		260.26	
2.	Social Media		271.70	
3.	Canvassing		411.97	
4.	Media		816.05	
5.	Collateral Messaging		330.55	
6.	Group Events		.00	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			2,090.53
20 - TOTAL COSTS				
1.	Total Costs			2,090.53
	Total			2,090.53
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Contract and Grant SD		Signature:		Date: 02/08/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way Bay Area
Grantee Representative	Colleen Smallfield
Telephone Number	415-808-4428
Email Address	csmallfield@uwba.org
Contract Number	18T-8010
Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	2

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Costs for December included the cost for staff salaries, rent, and connectivity for staff working on the website, as well as administrative costs. The total cost was \$178.39.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 In December, we worked on updating our client facing pages including our Cal EITC page, tax site finder, and county related flyers. While we update information throughout the season, we work diligently to update data during the month of December. We had 2 visits to our Cal EITC specific page and 10,723 to the entire site regionally.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 N/A

Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	13	Number of Tweets	14
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Our #volunteers are excited to help hard working filers access the #taxcredits they deserve. Sign up and be a part of it! https://volunteer.uwba.org/eks-volunteer		In honor of #InternationalChildrensDay we wanted to celebrate the way the #EITC and the #CTC fights poverty for families filing with #children We'd love for you to join our fight on poverty	
Number of Other Posts (Instagram, etc.)	3	Exact Messaging of Most-Liked "Other" Post	
		Are you looking for an opportunity for #SpringSemester? Look no further! #Volunteer with us to become an #IRS certified tax preparer. Learn more here: https://lnkd.in/gBQADkk #finance #career #tax #Jobs #Resume	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
This month, the costs cover salaries for both UWBA and our contractor, UWWC. The total social media staff costs for UWBA were \$174.05 and the total costs for UWWC were \$13.90, for a total of \$201.11 including administrative costs.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
This month, both UWBA and UWWC shared messages on Facebook and Twitter, and for UWBA specifically, on LinkedIn. These messages focused on volunteers, tax credits, and in the case of UWWC, ties between holiday activities and the upcoming tax season. Their most liked Facebook post was "Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people - #CalEITC."

Furthermore, we also continue to coordinate with United Ways of California to promote shared content.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:
N/A

Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 UWBA spent staff time planning with our contractors and partners for our canvassing campaigns. The total cost included staff salaries, rent, and connectivity, as well as admin support costs, which was \$282.39 total.

2) Provide broad overview of canvassing for targeted zip codes:
 While we did much of the planning work for our canvassing strategies, we did not reach out to any clients in December. Hence, we are looking forward to commencing our campaigns in the following months!

3) Provide a broad overview of canvassing for non-targeted zip codes: N/A

4) Provide broad overview of text messages sent out, including the total number of text messages sent: N/A

5) Provide broad overview of Phone Calls conducted: N/A

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: N/A

Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
Both UWBA and our contractor, UWWC, had staff costs under media for December, as both agencies worked hard to get campaigns designed and planned. UWBA also spent money on Facebook ads, which are scheduled to start in January. Total costs (\$910.76) include:

- Staff and Rent (UWBA): \$399.88
- Staff and Rent (Subcontractor - UWWC): \$388.00
- Facebook Advertising (UWBA): \$122.88

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A

4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	1,250
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 UWWC and UWBA had collateral messaging costs, both for staff time and rent for staff dedicated to designing materials. The total was \$540.57, with \$293.45 going to UWWC staff and \$211.75 to UWBA staff, as well as 7% going toward administrative support.

2) Provide a broad overview of flyer/brochure and poster distribution:
 UWBA distributed site materials, including client postcards and flyers, to our sites in Contra Costa County.

3) Provide a listing and narrative of direct mailers that went out: N/A

4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A

Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<div style="border: 1px solid black; min-height: 250px; padding: 5px;"> <p>N/A</p> </div>	

Target Area	8-Contra Costa/Sonoma
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

We did not face any challenges during this period, we were able to successfully begin all of our partnerships and put plans in place for media coverage, ads, canvassing, and more starting in 2019.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8010	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Colleen Smallfield / Director, EKS		E-mail Address: csmallfield@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		178.39	
2.	Social Media		201.11	
3.	Canvassing		282.39	
4.	Media		974.52	
5.	Collateral Messaging		540.57	
6.	Group Events		.00	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			2,176.98
20 - TOTAL COSTS				
1.	Total Costs			2,176.98
	Total			2,176.98
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Contract and Grant SD		Signature:		Date: 02/08/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8005	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Colleen Smallfield / Director, EKS		E-mail Address: csmallfield@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		562.06	
2.	Social Media		586.76	
3.	Canvassing		889.71	
4.	Media		1,762.35	
5.	Collateral Messaging		1,868.95	
6.	Group Events		342.05	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			6,011.88
20 - TOTAL COSTS				
1.	Total Costs			6,011.88
	Total			6,011.88
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Contract and Grant SD		Signature:		Date: 02/08/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8006	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Colleen Smallfield / EKS, Director		E-mail Address: csmallfield@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		260.26	
2.	Social Media		271.70	
3.	Canvassing		411.97	
4.	Media		816.05	
5.	Collateral Messaging		330.55	
6.	Group Events		.00	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			2,090.53
20 - TOTAL COSTS				
1.	Total Costs			2,090.53
	Total			2,090.53
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Contract and Grant SD		Signature:		Date: 02/08/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Bay Area		Contract Number: 18T-8010	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Colleen Smallfield / Director, EKS		E-mail Address: csmallfield@uwba.org	Telephone: 415-808-4315	Fax Number: 415-808-4315
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		178.39	
2.	Social Media		201.11	
3.	Canvassing		282.39	
4.	Media		974.52	
5.	Collateral Messaging		540.57	
6.	Group Events		.00	
7.	Other 1		.00	
8.	Other 2		.00	
Total				2,176.98
20 - TOTAL COSTS				
1.	Total Costs			2,176.98
Total				2,176.98
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Maria Nguyen / Contract and Grant SD		Signature:		Date: 02/08/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Ways of California		Contract Number: 18T-8018	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Max Moy-Borgen / Income Program Manager		E-mail Address: mmoy-borgen@unitedwaysca.org	Telephone: 510-499-3734	Fax Number: 877-908-8922
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web			2,609.54
2.	Social Media			4,673.15
3.	Canvassing			21,893.49
4.	Media			3,023.79
5.	Collateral Messaging			5,775.99
6.	Group Events			2,427.46
7.	Other 1			495.46
8.	Other 2			33,645.46
Total				74,544.34
20 - TOTAL COSTS				
1.	Total Costs			74,544.34
Total				74,544.34
CONTRACTOR'S CERTIFICATION				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Nalleli Sandoval / Financial Stability Director		Signature:		Date: 01/30/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Ways of California
Grantee Representative	Max Moy-Borgen
Telephone Number	510-499-3734
Email Address	mmoy-borgen@unitedwaysca.org
Contract Number	18T-8018
Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	1825

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff Time (Salary & Benefits) - \$1,960.45. INLAND EMPIRE: No. INLAND VALLEYS: Website Content Development (\$100) (Total = \$100), KERN: No. MERCED: No. MONTEREY: Web Development (\$120) Web Posting (\$80) (TOTAL = \$200), NORTHERN CALIFORNIA: No. NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: Staff Time: \$100. NORTHERN SANTA BARBARA: Staff time: \$173. SANTA BARBARA: Staff Time: 3 hours at \$22/hour + indirect expense (TOTAL = \$76), SAN LUIS OBISPO: No. VENTURA: No. WINE COUNTRY: No.

Subtotal: \$2,609.54

2) Provide a narrative of education and outreach activities conducted during the month under web:

INLAND VALLEYS: Re-designed website and added new EITC and CalEITC landing pages. Completely re-designed their webpage and put up new EITC page. They lost all data from their previous website, so hits are only inclusive of data from 12/23 -12/31. KERN: No. MERCED: Activities will be posting January 2019. MONTEREY: Update CalEITC page with current year information, ensure links are up to date and accurate, replace previous year's documents: <http://www.unitedwaymcca.org/californias-refundable-tax-credit-caleitc>, NORTHERN CALIFORNIA: No, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: Program Coordinator met with website administrator. NORTHERN SANTA BARBARA: They created a new website this month, and are using it to highlight CalEITC opportunities. The financial stability pillar of their site is dedicated to tax opportunities including CalEITC. The site went live after January 1, but their temporary site advertised CalEITC - the caleitc4me.org/earn-it page was linked and included verbiage. SANTA BARBARA: Staff drafted and revised EITC related webpages that went live in December 2018. Staff reviewed best practices and pages for other organizations to ensure that UWSBC pages will be as impactful as possible. SAN LUIS OBISPO: N/A, VENTURA: N/A, revising in January. WINE COUNTRY: N/A

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	97	Number of Tweets	730
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
N/A (for UWCA see other posts below)		#CalEITC will benefit more working families next tax season. #UnitedWay can help you. Text CalEITC to 51555 to connect with us.	
Number of Other Posts (Instagram, etc.)	47	Exact Messaging of Most-Liked "Other" Post	
		N/A (for UWCA see other posts below)	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff (Salary & Benefits) for Social Media - \$2266.79, Social Media Tools - \$59, Total = \$2325.79. INLAND EMPIRE: No. INLAND VALLEYS = Content Development and Calendar (\$100) posting on platforms \$100, Total = \$200, KERN: Content Development and posting on platforms Total = \$623; MERCED: Staff Time at \$22.00 for 36 hours, (TOTAL = \$792). MONTEREY: Staff time crafting and publishing social media messages \$80. NORTHERN CALIFORNIA: No. NORTHERN SANTA BARBARA: Facebook Ads \$200. SANTA BARBARA: Staff Time 12.5 hours at \$20/hour + indirect expense (TOTAL = \$300). SAN LUIS OBISPO: No. VENTURA: Staff Time = \$138.46; WINE COUNTRY: Staff Time of .5 hours at \$27.80 (TOTAL = \$13.90).

Subtotal: \$4673.15

2) Provide a narrative of education and outreach activities conducted during the month under social media:

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

UWCA developed January social media ed calendar and finalized images and worked on CalEITC Awareness Toolkit. INLAND VALLEYS: Used UWCA master social media calendar to create majority of posts. Also re-tweeted and shared posts from other UW partners. Also created posts based on media articles on EITC. KERN: Focused the UWCA CalEITC Editorial Calendar for social media postings/messaging. Some additional social media posts covered our volunteer events, community presentations, CalEITC4me messaging, and VITA volunteer recruitment. Paid for additional promotion on some VITA volunteer recruitment posts. MERCED: They focused their social media content on the United Ways of California's Social Calendar content which is sent out monthly due to waiting for approval of fliers. They are projecting more social media posts once language and marketing materials have been approved by UWCA. MONTEREY: Staff crafted and published social media messages including several posts on the benefits of CalEITC, who it helps, and how to find out about eligibility. NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: Created and posted Facebook English CalEITC and Spanish CalEITC ads. The ads on December 6th which were the first and second most liked posts. The ad is intended to educate the public about the CalEITC opportunities coming in the next tax season. Their city of Santa Maria is 73.7% Hispanic or Latino, so Spanish outreach is significant, especially to older populations who may not speak English. 1,269 people reached through Spanish promotion. 125 post engagements. 914 people reached through English promotion. 111 post engagements. SANTA BARBARA: Staff drafted and posted social media posts per the UWCA social media calendar. Staff also interacted with social media users to encourage further engagement. VENTURA: Utilization of CalEITC messaging as well as images around creating emergency fund, self-employed being eligible, what other benefits you qualify for and making sure you have the documentaiton that you need to file. Twitter - 5 retweets, 18 likes, 3,049 impressions, 30 total engagements. Facebook - 780 people reached, 5 likes, 5 shares. Instagram - 27 likes.

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:

UWCA: Twitter: "#CalEITC will benefit more working families next tax season. #UnitedWay can help you. Text CalEITC to 51555 to connect with us." INLAND EMPIRE: FB Post: "Holidays can be stressful. Need support and access to services? Check out this #family #resource page...." Twitter: "Do you have plans for 2019? Make it a great year by #volunteering at United Way...." INLAND VALLEYS: FB Post: "Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people. #CalEITC" Twitter: "You got the gifts and wrapped them. Now don't forget to save time and maximize your refund during tax season with this checklist! [Http://bit.ly/2gUNj6o](http://bit.ly/2gUNj6o) #CalEITC Get the most out of #taxtime" KERN: FB Post: "Our Telemundo interview recruiting VITA volunteers, with CEO Mari Pérez-Dowling. Please feel free to share and contact us at 661 834. 1820 if you'd like to become a VITA Volunteer." Twitter: "Holidays making you feel stretched thin? Don't leave money on the table! Find out if you may be eligible for #EITC #CalEITC & other benefits: bit.ly/benkit17 @benefitkitchen" Instagram: "Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people #CalEITC" MERCED: FB Post: "A flier received 10 likes about CalEITC" Twitter: "Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people. #CalEITC" Instagram: "You got the gifts and wrapped them. Now don't forget to save time and maximize your refund during tax season with this checklist! [Http://bit.ly/2gUNj6o](http://bit.ly/2gUNj6o) #CalEITC Get the most out of #taxtime" MONTEREY:

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
<p>season with this checklist! Http://bit.ly/2gUNj6o #CalEITC Get the most out of #taxtime" MONTEREY: FB Post: "#CalEITC beneficiará a más personas la próxima temporada fiscal. #UnitedWay puede ayudarle. Mandé un mensaje de texto con TUDINERO a 51555 para conectarse con nosotros." Twitter: "#CalEITC will benefit more working families next tax season. #UnitedWay can help you. Text CalEITC to 51555 to connect with us. Pic. Twitter.com/MH4TBdBya" Instagram: "You got the gifts and wrapped them. Now don't forget to save time and maximize your refund during tax season with this checklist! Http://bit.ly/2gUNj6o #CalEITC Get the most out of #taxtime". NORTERN CALIFORNIA: No. NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: FB Post: "#CalEITC will benefit more working families next tax season. #UnitedWay can help you. Text CalEITC to 51555 to connect with us." Twitter: "More than one million children are enrolled in Medi-Cal under CA Children's Health Insurance Program (CHIP). All low-income kids are eligible. Learn more and sign up today: https://www.health4allkids.org/ #health4All" Instagram: "- In Northern Santa Barbara County, we fight for the financial stability of every member of our community. Find out if you qualify for California's Earned Income Tax Credit by clicking here. Hashtag#taxcredits, hashtag#legaladvice" SANTA BARBARA: FB Post: "Holidays making you feel stretched thin? Don't leave money on the table! Find out if you may be eligible for #EITC #CalEITC & other benefits: bit.ly/benkit17 @benefitkitchen" Instagram: "Happy New Year! Let's get to work on your resolutions and start the year off right. Get off the couch, get out of bed, and start saving. We can help - http://bit.ly/20TomrP" SAN LUIS OBISPO: N/A. VENTURA: FB Post: "Did you know? The largest population of EITC recipients are single mothers. We support the CalEITC because it is a proven antipoverty program that has unequivocally helped single mothers. Learn more at https://bit.ly/1OSCCOK" Twitter: "Self-employed? You can still qualify for @CalEITC4Me! Make sure you follow these tax tips to make the most of your #CalEITC!" Instagram: "What else are you eligible for? Find out! Http://caleitc4me.org/benefits" WINE COUNTRY: FB Post: "Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people #CalEITC" Twitter: "You got the gifts and wrapped them. Now don't forget to save time and maximize your refund during tax season with this checklist! Http://bit.ly/2gUNj6o #CalEITC Get the most out of #taxtime"</p>	

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	30
Office Visits	10

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff time (Salary and Benefits) = \$2266.79, Text Messaging Tools = \$18,716.70, (TOTAL = \$20983.49) INLAND EMPIRE: 0, INLAND VALLEYS: 0, KERN: 0, MERCED: Staff time: 5 hours at \$22.00 per hour. (TOTAL = \$110), MONTEREY: 0, NORTHERN CALIFORNIA: 0, NORTH COAST OPPORTUNITES VOLUNTEER NETWORK: Staff Time: \$400. NORTHERN SANTA BARBARA: 0, SANTA BARBARA: Staff Time for Community Impact Associate 15 hours at \$20/hour and indirect expenses (TOTAL = \$400), SAN LUIS OBISPO: 0, VENTURA: 0, WINE COUNTRY: 0

Subtotal: \$21,893.49

2) Provide broad overview of canvassing for targeted zip codes:

INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, Spent time researching cities in County to canvass, researched by income, and the areas to focus on to achieve the maximum impact. MONTEREY: 0, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: 0, VENTURA: 0,

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

3) Provide a broad overview of canvassing for non-targeted zip codes:

INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: 0,

4) Provide broad overview of text messages sent out, including the total number of text messages sent:

UWCA: Developing text messaging campaign working with vendor to prepare for project. INLAND EMPIRE: 0, beginning text messages in January. INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: Program Director met with canvasser to develop marketing strategies and review materials. SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: 0, WINE COUNTRY: N/A,

The following info was added from an email received from Grantee on 1/30/19: *For the text messaging campaign: We are working with a company called Community Connect Labs. We pre-paid them in December for work in subsequent months. That amount includes what we are paying them to assist us with this work. We have had a few initial conversations and more in January have been developing a client flow and collating reports for them of our networks of clients and free tax sites as well it will calculate for them the estimated CalEITC based on number of family members, not being Married Filing Separately, and also their income limit. Texts will go out hopefully in February and then in subsequent months following up to ensure they got a tax appointment and additional information.*

5) Provide broad overview of Phone Calls conducted:

INLAND EMPIRE: When encountering a client, who based on their income and their financial situation, call representative informed clients over the phone about VITA along with the CalEITC. Call representatives have access to income guidelines and the focus groups for CalEITC. Educating clients who may be eligible for incentive via call center phone calls. INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: Community Impact Associate phoned community partners to coordinate EITC efforts and arrange for community presentations/distributions of materials for their clients. Community partners will be receiving and sharing information with their clients and staff to get the word out about EITC and VITA services for the next few months. SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
<p data-bbox="180 243 1349 344">6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:</p> <p data-bbox="180 386 1422 611">INLAND EMPIRE: N/A, INLAND VALLEYS: NA, KERN: Canvassing efforts are underway between UWKC and Vision y Compromiso (KC Promotora Network) and messaging training held on Dec 19th. Although we were hoping to be on the ground and running in Dec., we are still waiting on FTV to mail the flyers and brochures in English and Spanish that will be used for canvassing. MERCED: 0, Awaiting approval of fliers before canvassing can begin. MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A</p>	

Target Area	15-Statewide			
Reporting Period	December 1, 2018 - December 31, 2018			
Media				
Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	2	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	1	111	0	0
Social Media Promoted/Boosted Ads	1	914	1	1,269

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff Time (Salary and Benefits) (TOTAL = \$2,266.79), INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: \$30 for FB ads, and \$75 for staff time (TOTAL = \$105), MERCED: 12 hours at \$22/hour (TOTAL = \$264), MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: Staff time 10 hours at \$38.80 (TOTAL = \$388)

Subtotal: \$3,023.79

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, pending impressions from Univision and Telemundo, MERCED: N/A, MONTEREY: 0, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A.

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: December 13th - VITA Univision TV Interview KABE 39, waiting on TV station to provide a link. December 14th - VITA Telemundo TV

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
<p data-bbox="168 218 285 245">Inteview -</p> <p data-bbox="168 315 1393 804"> https://www.kget.com/telemundo/nuestra-comunidad/aprenda-a-preparar-impuestos-para-ayudar-a-otros-y-ayudarse-a-si-mismo_20181217214041/1663489364?fbclid=IwAR0zVFjIzc9qGbXQuKVzSzLLmbWTmmUvIYGupT8FSYYyqH8q4hLnzOAb1ZU, MERCED: N/A, Staff time was spent largely due to coordinating media activities like street banners, billboards, and radio ads. Established future media materials, just awaiting for approval of messaging before moving forward. MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: Spanish Facebook Ad 52.5% women, 47.5% men, Top age groups - men = 18-24, women 35-44, all located in CA. English Facebook Ad 54.1% women, 45.9% menm Top age groups - men = 18-24, women 18-24, all located in CA. English Ad: https://www.facebook.com/NorthernSantaBarbaraCountyUnitedWay/photos/a.421603817952908/1990955801017694/?type=3&theater Spanish Ad: https://www.facebook.com/NorthernSantaBarbaraCountyUnitedWay/photos/a.421603817952908/1990955194351088/?type=3&theater. SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: Staff time to create 10 bus ads submitted for approval to CSD. </p> <p data-bbox="168 846 1235 877">4) Indicate any leveraging of other resources conducted this month in regards to media:</p> <p data-bbox="168 917 1365 1045"> UWCA: Worked with subgrantees to provide feedback and approval on media messages such as PSAs, Billboards, etc. INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A </p>	

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	36,370
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff Time (Salary and Benefits) = \$1,960.54, Graphic Design Contractor = \$350 (TOTAL = \$2,310.54) INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: \$2,303 for flyer/brochure and poster distribution. MERCED: 39.5 hours at \$22/hour (TOTAL = \$869), MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: Staff time at .5 hours at \$27.80 and .5 hours at \$38.80 and 5 hours at \$52.03, (TOTAL = \$293.45)

Subtotal: \$ 5,775.99

2) Provide a broad overview of flyer/brochure and poster distribution:

UWCA: Worked on finalizing postcards to send to partners that will be used for in-person distribution as well as can be used for direct mailers. UWCA also finalized the CalEITC messaging and outreach toolkit. INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: Distributed to partners at: Richardson Family Resource Center, Stella Hills Elementary, Univision Communications Inc., KGET - TV, Delano Family Resource Center, Nueva Continuation High School, McFarland Family Resource Center, Greenfield Family Resource Center, Boys & Girls Club, South Chester Wellness Center, Shafter City Hall, Healthy Start Office Shafter, Kern High School District, Bakersfield City School District - Parent Centers (30,000) - school volunteered to print them. Bakersfield College (Bakersfield and Delano) 1,000, Wasco Family Resource Center, Bakersfield Adult School, Mexican American Opportunity Foundation, KC Child Support Sevices, St. John Baptist Church, Self -Help Bank, San Joaquin Valley College, Independent Living Center, Kern County Library, MERCED: N/A, MONTEREY: The information was given to the Latino community in East Salinas. The dominant age range was 18 - 35 and included about 80% females. The number, type and zip codes of outreach activities (tabling, community meetings, door-to-door, etc.): There were a total of 1100 attendees at the Snow Day Event put on by the City of Salinas - Cesar Chavez Library. It is a free event for families to experience being in the snow and get resources from the community. The information was given to residents while they were standing in line to get into the library. Normally this would have been a tabling event but they were fortunate enough to have more one on one time with residents as they waited in line to give the information. NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: Staff time used to develop and produce postcard mailing (to be mailed in January).

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
<p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A, to be mailed in January.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources:</p> <p>INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: All staff time was spent drafting numerous fliers and social media posts for approval by CSD/UWCA, including communicating with UWCA Staff and UWMC CEO messaging, revising/draft messaging, etc. MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A</p>	

Target Area	15-Statewide			
Reporting Period	December 1, 2018 - December 31, 2018			
Group Events				
Total Number of Events Held During the Reporting Period			2	
Location	Zip Code	Date	Attendance	Press at Event?
Library	93905	12/19/2018	1100	No
Educational Forum	93721	12/04/18	20	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

UWCA: Staff Time (Salary and Benefits) (TOTAL = \$2,427.46) INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A

Subtotal: \$2,427.46

2) Provide a brief overview of events conducted during the reporting period:

UWCA: Conducted interviews to hire a Communications Manager and began coordination efforts with local United Ways and partners regarding CalEITC Awareness Week and Tax Week. On 12/4 UWCA staff attended the California Asset Building Coalition Conference in Fresno and discussed EITC information and outreach efforts during workshop (~20 people). INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: The information was given to the Latino community in East Salinas. The dominant age range was 18 - 35 and included about 80% females. The number, type and zip codes of outreach activities (tabling, community meetings, door-to-door, etc.): There were a total of 1100 attendees at the Snow Day Event put on by the City of Salinas - Cesar Chavez Library. It is a free event for families to experience being in the snow and get resources from the community. The information was given to residents while they were standing in line to get into the library. Normally this would have been a tabling event but they were fortunate enough to have more one on one time with residents as they waited in line to give the

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
<p>information. NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A</p> <p>3) If members of the press attended an event, indicate which press outlets:</p> <p>INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources:</p> <p>INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER</p>	

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
211	0
DMV	0
Narrative of Expenditures in EARS and Outreach Activities	
<p>Expenditures: UWCA: Motor Vehicle Network payment for DMV ads = \$33,150 and indirect costs for DMV ads for \$495.46 (TOTAL = \$33,645.46)</p> <p>UWCA: Indirect costs totalling \$495.46 for 211.</p> <p>UWCA entered into contract with Motor Vehicle Network to place DMV ads at the following locations: Merced, Turlock, Tracy, Delano, and Riverside</p> <p>INLAND EMPIRE: N/A, INLAND VALLEYS: N/A, KERN: N/A, MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: N/A, SANTA BARBARA: N/A, SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: N/A</p>	

Target Area	15-Statewide
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

INLAND EMPIRE: N/A, INLAND VALLEYS: Re-designing the website and switching to new host and provider caused them to lose all metric data from their old website. Metrics included are only for the period which their new website was live which was as of 12/23/2018. KERN: Major challenge in the month of December was not having flyers and posters in English and Spanish to begin canvassing efforts. Their low-income residents in their county tend to use refund anticipation loan services starting mid-December and they really need to focus on reaching out to those families earlier. CalEITC4me website was not updated in December and they had nothing from FTB either. MERCED: N/A, MONTEREY: N/A, NORTHERN CALIFORNIA: N/A, NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A, NORTHERN SANTA BARBARA: Only challenge is not having enough information to complete the report due to the Holidays and our Program not starting yet. Other than that we are making great progress with social media and #CalEITC. SANTA BARBARA: Staff faced usual challenge of coordinating sites/hours and continuing to recruit volunteers. SAN LUIS OBISPO: N/A, VENTURA: N/A, WINE COUNTRY: No CA EITC outreach being done at this time besides through social media.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way CA Capital Region		Contract Number: 18T-8007	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916-368-3029
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	44.39		
2.	Social Media	.00		
3.	Canvassing	4,040.70		
4.	Media	97.10		
5.	Collateral Messaging	5,819.55		
6.	Group Events	2,634.16		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	12,635.90		
20 - TOTAL COSTS				
1.	Total Costs	12,635.90		
	Total	12,635.90		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Jennifer Macias / Chief Operating Officer		Signature:	Date: 02/12/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way California Capital Region
Grantee Representative	Amy Williamson
Telephone Number	916-856-3993
Email Address	amy.williamson@uwccr.org
Contract Number	18T-8007
Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	250

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 \$39.99 YourFreeTaxMoney.org domain renewal with Network solutions
 Indirect cost \$ \$4.40
Total \$44.39

- 2) Provide a narrative of education and outreach activities conducted during the month under web:

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	0	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
NA		NA	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		NA	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
NA

2) Provide a narrative of education and outreach activities conducted during the month under social media:
NA

3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:
NA

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	985
Canvassing in Non-Targeted Zip Codes	3788
New Individuals Who Received Text Messages	41
Phone Calls	3
Office Visits	403

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Program work costs from sub-grantees
Asian Resources: \$1235.00
Community Link: \$0
International Rescue Committee: \$995.94
La Familia: \$750.00
Mutual Assistance Network: \$435.00

UWCCR staff time: \$224.32

Indirect: \$400.44 (11 percent of category total)

Total \$4040.70

2) Provide broad overview of canvassing for targeted zip codes: see attached Word document

3) Provide a broad overview of canvassing for non-targeted zip codes: see attached Word ocument

4) Provide broad overview of text messages sent out, including the total number of text messages sent: International Rescue Committee staff conducted three phone calls to clients currently accessing employment services. As part of the programmatic calls, IRC staff shared eligibility information about CaLETIC and how to access VITA services.

5) Provide broad overview of Phone Calls conducted: International Rescue Committee staff conducted three phone calls to clients currently accessing employment services. As part of the programmatic calls, IRC staff shared eligibility information about CaLETIC and how to access VITA services

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: International Rescue Committee in Sacramento leveraged its existing partnership with the

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 \$6,166.67 - Campaign Creative with Honey Agency
 UWCCR staff time: \$87.48
 Indirect cost \$9.62
 Total \$97.10

- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions:

- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:
 NA

- 4) Indicate any leveraging of other resources conducted this month in regards to media:
 NA

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	88,200
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 \$4902.91 - Printing Cal EITC flyers in 9 languages with River City Printers (English, Spanish, Russian, Hmong, Vietnamese, Cantonese, Dari, Farsi, Arabic)
- UWCCR staff time: \$339.93
 Indirect cost \$576,71
Total \$ 5819,55
- 2) Provide a broad overview of flyer/brochure and poster distribution:
 88,200 distributed to community partners including LFCC (English + Spanish), ARI (English, Spanish, Russian, Hmong, Vietnamese, Farsi, Arabic, Cantonese, Dari), MAN (English, Spanish, Farsi, Dari), 2-1-1 (English, Spanish, Russian, Hmong, Vietnamese, Farsi, Arabic, Cantonese, Dari) IRC (English, Spanish, Russian, Arabic)
- 3) Provide a listing and narrative of direct mailers that went out:
 NA
- 4) Any other additional information pertinent to work conducted including leveraging of other resources:
 NA

Target Area	5-Sacramento			
Reporting Period	December 1, 2018 - December 31, 2018			
Group Events				
Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
School	95820	12/03/18	10	No
Community Gathering	95824	12/03/18	50	No
Community Gathering	95820	12/04/18	10	No
Community Gathering	95825	12/04/18	5	No
Community Gathering	95817	12/05/18	62	No
Community Gathering	95825	12/06/18	50	No
Community Gathering	95610	12/07/18	45	No
Community Gathering	95817	12/10/18	46	No
Community Gathering	95820	12/11/18	10	No
Educational Forum	95825	12/11/18	5	No
Community Gathering	95824	12/12/18	50	No
Educational Forum	95825	12/12/18	5	No
Church	95824	12/15/18	85	No
Community Gathering	95820	12/18/18	10	No
Educational Forum	95825	12/28/2018	4	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Program work costs from sub-grantees:

Asian Resources: \$1750.00

Community Link: \$0

International Rescue Committee: \$298.78

La Familia: \$100.00

Mutual Assistance Network: \$0

UWCCR staff time: \$224.34

Indirectcost: \$261.04

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018
<p><u>TOTAL: \$2634.16</u></p> <p>2) Provide a brief overview of events conducted during the reporting period: see attached Word document</p> <p>3) If members of the press attended an event, indicate which press outlets: None.</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources:: From Asian Resources: Community members appreciate when information can be shared in their native languages. They feel comfortable asking questions knowing they will receive answers.</p>	

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<p>Type Text here</p>	

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Asian Resources

Similar to last month, clients are not yet ready to think about tax preparation as they have not yet received their w-2s for the year. We have continued to provide education and outreach about CalEITC and many clients that were not aware they were eligible for the credit will now be scheduling appointments to get their taxes prepared once the season gets closer.

Community Link -211 Sacramento

Canvassing efforts during December were confined to the automated outreach messaging in the IVR system due to limited outreach opportunities, although a new outreach position has been created and is anticipated to yield much great opportunities for in person outreach for the coming period.

Narrative of Success Stories

Success Story #1: Asian Resources

Date of Success Story: n/a

Name of Person from Success Story: n/a

Zip-Code Where Person Lives: n/a

VITA Site where person got taxes done (if applicable):n/a

Narrative: Many individuals and families shared that they were not aware of any free tax prep services through VITA. They were excited to obtain more information and are eager to schedule an appointment when the time comes closer.

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way CA Capital Region		Contract Number: 18T-8007	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916-368-3029
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	44.39		
2.	Social Media	.00		
3.	Canvassing	4,040.70		
4.	Media	97.10		
5.	Collateral Messaging	5,819.55		
6.	Group Events	2,634.16		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	12,635.90		
20 - TOTAL COSTS				
1.	Total Costs	12,635.90		
	Total	12,635.90		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Jennifer Macias / Chief Operating Officer		Signature:	Date: 02/12/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

Target Area	5-Sacramento
Reporting Period	December 1, 2018 - December 31, 2018

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Fresno & Madera Co		Contract Number: 18T-8013	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Suliana Juarez / IT Coordinator		E-mail Address: Sjuarez@uwfm.org	Telephone: 559-243-3665	Fax Number: 5592885189
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	154.67		
2.	Social Media	.00		
3.	Canvassing	10,916.87		
4.	Media	154.67		
5.	Collateral Messaging	1,208.34		
6.	Group Events	.00		
7.	Other 1	3,104.33		
8.	Other 2	.00		
	Total	15,538.88		
20 - TOTAL COSTS				
1.	Total Costs	15,538.88		
	Total	15,538.88		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Lindsay Callahan / President and CEO		Signature:	Date: 01/23/2019	
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)	2018 Cal EITC Education and Outreach Grant Monthly Progress Report
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Grantee Organization Name	United Way of Fresno and Madera Counties
Grantee Representative	Suliana Juarez
Telephone Number	559-243-3665
Email Address	sjuarez@uwfm.org
Contract Number	18T-8013
Target Area	12-Fresno
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	26

Narrative of Expenditures in EARS and Outreach Activities

- | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1) List the various activity-expenditures charging for this month and their cost:
 Subcontractor Fees for website updates = \$154.67</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web:

 Update CalEITC 2018 webpage with new qualifications issued by FTB on the site.</p> <p>3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N/A</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Target Area	12-Fresno		
Reporting Period	December 1, 2018 - December 31, 2018		
Social Media			
Number of Facebook Posts	8	Number of Tweets	11
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people. #CalEITC</p>		<p>UW Fresno Madera @UWFMC Santa delivered his Christmas cheer, now it's time for you to start your new year. If you made under \$25,000 this year, you could see your refund climb with a credit for working people - #CalEITC. #EITC #ItsYourMoneyGetIt #BenefitKitchen pic.twitter.com/83Tdp3JFLC</p>	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: No costs for this period occurred: \$0</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media: Posts were done on our social media sites to coordinated messaging that synced with UWCA media kits for the month of December and other posts to promote CalEITC and FTP volunteer recruitment.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media: N/A</p>			

Target Area	12-Fresno
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	2000
Canvassing in Non-Targeted Zip Codes	100
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	20

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
Total Expenses for thei period: \$ 10,916.87

Staff Salaries :\$ 3789.99
Program Director: \$ 32.76hr x 25hrs= \$819.00
VTA PRogram Manager: \$25.57 x 47hrs =\$1201.79
Outreach and Education Coordinator: \$20.92hr x 85hrs= \$1778.20

Service Fee for Tablets (Dec) : \$115.04
Subcontractor Fee Interface: \$7002.84 (211 Hotline Phone service)
- 2) Provide broad overview of canvassing for targeted zip codes:
Attended events and handed out Cal EITC flyers to families who attended the event. Verbally shared recent changes to eligibility for tax credit and answered question asked by families. Contacted multiple agencies in our target area to deliver distribtuion materials including but not limited to community partners and campaign workplace partners.
- 3) Provide a broad overview of canvassing for non-targeted zip codes:
Distribtued and interacted with fmailies at a resource fair in zip code 93638 we estimated 100 people were handed or spoken to about CalEITC information.
- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
No texts were sent this period but campaign developement took place with our subcontractor Interface to set the first launch of messaging for January.
- 5) Provide broad overview of Phone Calls conducted:
No cold calls were made to public but we did make phone calls and office visits to twenty partners to distribute flyers and help educate the staff about CalEITC credits and Free Tax Prepartion inforamtion.
- 6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month: Worked with communtiy parnters to provide new materials and information for

Target Area	12-Fresno
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0			
Paid Radio Ads	0			
Public Services Announcements (Radio)	0			
Paid Television Ads	0			
Public Services Announcements (T.V.)	0			
Billboards	0			
Transit Advertisements	0			
Internet/Website Ads	0			
Social Media Promoted/Boosted Ads	0			

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
Subcontractor fees for media plan development: \$154.67
- 2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A
- 3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: N/A
- 4) Indicate any leveraging of other resources conducted this month in regards to media: N/A

Target Area	12-Fresno	
Reporting Period	December 1, 2018 - December 31, 2018	
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	31,993
	Number of New Individuals who Received Direct Mailers	0
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost: Staff Salaries: \$1208.34 Material Distribution Salaries: \$12.33hr x 54 hrs = \$ 665.82 Coordination of Distribution Salaries \$12.33hr x 44 hrs- \$542.52</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: Flyers for CalEITC were distributed to elementary, middle school and high schools in our Target Area of Fresno County before winter break.</p> <p>3) Provide a listing and narrative of direct mailers that went out: N/A</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: Postcards and flyers from CSD where used in this distribution to reduce any printing costs. We</p>		

Target Area	12-Fresno
Reporting Period	December 1, 2018 - December 31, 2018

Group Events

Total Number of Events Held During the Reporting Period			2	
Location	Zip Code	Date	Attendance	Press at Event?
Mega Event	93711	12/08/18	100	Yes
Church	93638	12/07/18	100	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 No costs this period

2) Provide a brief overview of events conducted during the reporting period:
 Staff attended and distributed information flyers and interacted with patrons at a large resource fair located in our target area. During this event Outreach Coordinator provided one on one information as well as distributed flyers to the attendees.

3) If members of the press attended an event, indicate which press outlets: ABC 30 and Univision news stations did a spot on the event.

4) Any other additional information pertinent to work conducted, including leveraging of other resources: N/A

Target Area	12-Fresno
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Grantee Meetings	3 Meetings CSD, SIT and UWCA
Partner Meetings	8 Meetings with Subcontractors and Community Partners
Administrative/ Reporting	3 Meetings for Reporting with Program Staff
Narrative of Expenditures in EARS and Outreach Activities	
<p>Administrative Costs for Dec: \$ 3104.33 Grantee Required Staff Meetings for Dec : \$469.00 Program related meetings with Partners and Subcontractors for Dec: \$ 1407.00 Administrative/ Reporting with Program Staff for Dec: \$1228.33</p>	

Target Area	12-Fresno
Reporting Period	December 1, 2018 - December 31, 2018

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

No challenges to report during this period.

Narrative of Success Stories

Success Story #1

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #2

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

Success Story #3

Date of Success Story:
 Name of Person from Success Story:
 Zip-Code Where Person Lives:
 VITA Site where person got taxes done (if applicable):
 Narrative:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: United Way Fresno & Madera Co		Contract Number: 18T-8013	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Suliana Juarez / IT Coordinator		E-mail Address: Sjuarez@uwfm.org	Telephone: 559-243-3665	Fax Number: 5592885189
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	154.67		
2.	Social Media	.00		
3.	Canvassing	10,916.87		
4.	Media	154.67		
5.	Collateral Messaging	1,208.34		
6.	Group Events	.00		
7.	Other 1	3,104.33		
8.	Other 2	.00		
	Total	15,538.88		
20 - TOTAL COSTS				
1.	Total Costs	15,538.88		
	Total	15,538.88		
<i>CONTRACTOR'S CERTIFICATION</i>				
I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.				
Authorized Person (Print Name/Title): Lindsay Callahan / President and CEO		Signature:		Date: 01/23/2019
CSD ACCOUNTING USE ONLY				
Payment:		PCA#		
Approved By:		Date:		

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Youth Policy Institute		Contract Number: 18T-8001	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Miriel Thompson / Grant Manager	E-mail Address: miriel.thompson@ypiusa.org	Telephone: 213-688-2802	Fax Number: 213-688-2802	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	1,438.00
2.	Social Media	3,447.00
3.	Canvassing	9,425.00
4.	Media	2,105.00
5.	Collateral Messaging	2,760.00
6.	Group Events	4,407.00
7.	Other 1	.00
8.	Other 2	.00
	Total	23,582.00

20 - TOTAL COSTS

1.	Total Costs	23,582.00
	Total	23,582.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Steven Schultz / Chief Financial Officer

Signature:

Date:
02/01/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Youth Policy Institute
Grantee Representative	Martha Nemecek
Telephone Number	323.940.4189
Email Address	mnemecek@ypi.org
Contract Number	18T-8001
Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Web	
Category	Metrics
EITC Website Hits	850

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Development of website content design (\$479), website hits reporting guidelines (\$479), and website technical support (\$480). Overall web activity-expenditure cost = \$1438

2) Provide a narrative of education and outreach activities conducted during the month under web:

During the month of December, Youth Policy Institute's CalEITC webpage received 850 website hits. The directed traffic was brought to YPI's CalEITC webpage through our various social media platforms, Twitter, Facebook, and Instagram. YPI's CalEITC webpage is broadcasted through the various posts made on social media platforms.

Additionally, during the month of December, Youth Policy Institute's CalEITC outreach team and YPI's communications team met to further discuss YPI's CalEITC webpage, located at <http://ypi.org/caleitc>. The necessary changes, such as CalEITC eligibility, new adjustments, where to locate and when to access free tax preparation services, as well as the expansion of the CalEITC tax credit is scheduled to go live during the month of January.

In addition to updating YPI's CalEITC webpage with the new eligibility criteria, YPI's CalEITC page will also be redesigned to showcase posts made on our Instagram account to further direct potential filers to YPI's CalEITC social media platforms to further engage potential filers and to bring awareness to the CalEITC tax credit. By doing so, it will also create a more user-friendly experience which will allow potential filers to further access resources containing CalEITC information.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:

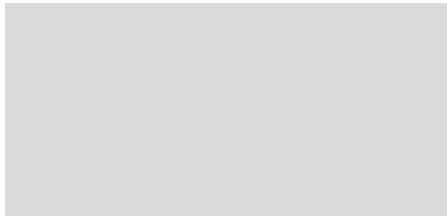
N/A

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Social Media

Number of Facebook Posts	25	Number of Tweets	61
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	

"Did you know Governor Jerry Brown's Office authorized an expansion to the CalEITC program? This means that more individuals will be able to claim the tax refund in 2019." "We have A LOT of #highschool students interested in becoming #VITA volunteers!!"



Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
<p>will connect them to free tax preparation services provided by VITA locations. By doing so, we have been able to post 61 tweets during the month of December. YPI's CalEITC Social Media Specialist also continues to use trending hashtags to further reach an even larger audience online.</p> <p>3) You may share additional messaging as an attachment in the email sent to CSD, but it is not required. Also indicate any leveraging of other resources conducted this month in regards to social media:</p> <p>See attached document titled YPIEmpowers_TwitterDec.pdf for examples on the messaging used on YPI's Twitter account for CalEITC.</p> <p>See attached document titled YPIEmpowers_FacebookDec.pdf for examples on the messaging used on YPI's Facebook account for CalEITC.</p> <p>See attached document titled YPIEmpowers_InstagramDec.pdf for examples on the messaging used</p>	

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	189
Office Visits	532

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Outreach plan development for targeted and non-targeted canvassing (\$9425)

2) Provide broad overview of canvassing for targeted zip codes:
 Similar to the previous months, YPI's CalEITC outreach team continued to develop a plan for best practices and methods when conducting canvassing and outreach in targeted zip codes.

3) Provide a broad overview of canvassing for non-targeted zip codes:
 Similar to the previous months, YPI's CalEITC outreach team continued to develop a plan of best practices and methods when conducting canvassing and outreach in non-targeted zip codes.

4) Provide broad overview of text messages sent out, including the total number of text messages sent:
 No text messages were sent out during the month of December; however, text messages to be sent beginning in January have been developed to send to the 500+ contacts that have been imported into our ClubTexting account. ClubTexting is an online mass texting service which will allow YPI to reach a large group of potential filers simultaneously.

5) Provide broad overview of Phone Calls conducted:
 YPI's CalEITC outreach team and YPI's Hollywood FamilySource Center team conducted a total of 189 phone calls during the month of December. During these phone calls, YPI CalEITC staff spoke to participants about what CalEITC is, how to claim it, and if they were interested in filing taxes for free with the VITA program offered at YPI's Hollywood FamilySource Center, the Ventanilla Financiera at the Mexican Consulate, or at YPI's WorkSource Center located in Pacoima, CA 91331.

6) Provide broad overview of interactions conducted during Office Visits:
 YPI's Hollywood FamilySource Center (HFSC) received a total of 532 office visits from clients who received flyers and information regarding CalEITC relevant information, eligibility, and how to claim CalEITC on their taxes.

7) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating any leveraging of other resources (i.e. community partners) conducted this month:
 YPI's CalEITC outreach team hired 4 staff members who will be responsible for conducting canvassing

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	0	0	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	0	0	0	0
Public Services Announcements (T.V.)	0	0	0	0
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	0	0	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Production costs associated with PSAs involving Adam Rodriguez (\$1052) & development of content related information for ethnic newspaper printed ads (\$1053). Overall media activity-expenditure costs = \$2105

2) In regards to each type of ad, either indicate here or simply attach in the email sent to CSD a breakdown of each post's impressions: N/A

3) Provide information on whether or not any earned media obtained during the month. For each earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD:

Media was not obtained during the month of December. During this time, YPI's CalEITC outreach team and YPI's communications team has been in discussion to strategize the best methods of investing in media coverage, as it can be a challenge in Los Angeles to obtain this. By strategizing, we will have an opportunity to reach an audience of potential filers, who may qualify to receive the CalEITC tax credit with the new adjustments.

Additionally, YPI's CalEITC outreach team has been in communication with Koreatown Youth and Community Center (KYCC), also a recipient of the CalEITC grant in Los Angeles, on plans regarding a press conference to highlight FreeTaxPrep services in Los Angeles as well as bringing awareness on receiving CalEITC. KYCC serves the evolving needs of the Korean American population in the greater Los Angeles area as well as the multiethnic Koreatown community by providing programs and services directed towards recently immigrated, economically disadvantaged youth and families, and promote community socioeconomic empowerment.

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
<p>4) Indicate any leveraging of other resources conducted this month in regards to media:</p> <p>Similar to the previous month, YPI's CalEITC outreach team has been working on content as well as the design of the printed ads to be able to share with ethnic newspapers such as Hoy, La Opinion and LA Rakurs. These ethnic newspapers target populations with limited-English proficiency, specifically whose first language is Spanish and Russian. YPI's CalEITC outreach team continued to design the newspaper ad to be able to purchase advertisements spaces in the ethnic newspapers starting in January.</p> <p>YPI's CalEITC outreach team and YPI's communications team continued to collaborate on content development regarding the creation of financial education videos and a public service announcement related to CalEITC and VITA. YPI's communications team has continued discussing with Celebrity Brand Ambassador, Adam Rodriguez, about a potential script and production dates to film the videos and PSA. YPI continues to plan to begin filming with Adam Rodriguez for the financial education videos and public service announcement as early as January 2019.</p>	

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	865
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Printing of collateral material for material distribution (\$1380) & development/creation of direct mailers (\$1380). Overall collateral messaging activity-expenditure costs = \$2760

2) Provide a broad overview of flyer/brochure and poster distribution:

During the month of December, YPI's CalEITC outreach team was able to distribute 865 flyers to those who may be eligible to receive the CalEITC tax credit.

CalEITC brochures were distributed to leadership and administration teams for review at the following schools in order to be able to distribute the flyers to the student body and their families: Roy Romer Middle School (91606), Bellingham Elementary (91606), Coldwater Canyon (91605), Saticoy Elementary (91605), Strathern Street Elementary (91605), Arminta Street Elementary (91605), Carmellia Avenue Elementary (91605), Fair Avenue Elementary (91605), John B Monlux Elementary (91606), Burbank Boulevard Elementary (91607), Colfax Charter Elementary (91607), Walter Reed Middle School (91602), and Carpenter Community Charter (91604). With the distribution of these flyers, YPI's CalEITC team set up an event on 12/14/2018 to provide education and outreach on the CalEITC tax credit and VITA's free tax preparation services. Additionally, YPI's CalEITC outreach team was able to distribute flyers at Greater New Matthew's Church in 90011.

The flyers distributed at these locations were all CalEITC4me material that the YPI CalEITC outreach team received during a CalEITC4me CSD LA County CalEITC Grantee Planning meeting held on December 7, 2018. The materials the schools received were a benefits checklist, an FAQ sheet about eligibility requirements for CalEITC, and benefits families may qualify for if they are eligible to receive CalEITC.

3) Provide a listing and narrative of direct mailers that went out:

Similar to the previous month, YPI's CalEITC outreach team is in the process of creating a distribution list as well as strategizing the best method to obtain potential filer contact information to ensure direct mailers are being sent to individuals who may be eligible to receive CalEITC. Additionally, YPI's CalEITC is in the process of creating the design of the direct mailer, which will be sent to CSD upon completion for approval.

4) Any other additional information pertinent to work conducted including leveraging of other resources:

YPI's CalEITC outreach team continued to build rapport with the schools and its administration from the list of compiled schools within LA County and the LA Promise Zone. By continuing to build

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018

Group Events

Total Number of Events Held During the Reporting Period			12	
Location	Zip Code	Date	Attendance	Press at Event?
School	90017	12/04/18	62	No
Food Bank	90029	12/04/18	125	No
School	91605	12/14/18	45	No
Resource Fair	91106	12/15/18	156	No
Resource Fair	90011	12/17/18	150	No
Community Gathering	90029	12/18/18	300	No
Educational Forum	90057	12/03/18	20	No
Educational Forum	90057	12/07/18	20	No
Educational Forum	90057	12/10/18	20	No
Educational Forum	90057	12/13/18	20	No
Educational Forum	90057	12/18/18	20	No
Educational Forum	90057	12/19/18	20	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:

Content development for presentations/outreach (\$4407). Overall group event activity-expenditure costs = \$4407

2) Provide a brief overview of events conducted during the reporting period:

YPI had 2 large events where over 300 community members attending YPI's Hollywood FamilySource Center (HFSC). Both of the events took place on 12/18/2018. The first event had 300 in attendance, all of which are families registered with the FamilySource Center. During this event, each family had an opportunity to take pictures with Santa and each child received a toy. Additionally, parents in attendance received relevant CalEITC collateral information from YPI's CalEITC outreach team and they were available to answer any questions participants had regarding the tax credit, requirements, and eligibility.

The second event, a pop-up thrift store, hosted by YPI's Health & Wellness program, also had 300 in attendance. The Health & Wellness program engages and educates children and their parents in physical activities and nutrition workshops to support health and wellness of the whole family. During this event, YPI representatives as well as community partners donated lightly used clothing that would be used to donate to families registered with the Hollywood FamilySource Center. Additionally, YPI's CalEITC outreach team had an opportunity to distribute CalEITC information in both English and Spanish to those in attendance. They were also able to talk about the different VITA sites in the community and how they can be helped with any tax preparation needs for free at these sites.

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
<p>Additionally, on 12/5/2018, YPI's Financial Empowerment team also presented to over 62 potential student VITA volunteers at their first training orientation at the Miguel Contreras Learning Complex in 90017. Miguel Contreras Learning Complex will be the first high school in the City of Los Angeles to have a VITA location entirely run by high school student volunteers. During this orientation, students received information about VITA services and the importance of CalEITC tax credits. Similarly, YPI's CalEITC outreach team also presented at Saticoy Elementary School in 91605 on what CalEITC is, who may be eligible to receive CalEITC, as well as to engage teachers and school staff on how CalEITC could lift their students and their families out of poverty.</p> <p>Similar to the previous months, YPI's CalEITC outreach team continued to conduct daily presentations to the visitors attending the Mexican Consulate's Ventanilla Financiera. Over the course of a month, there have been over 120 potential filers who have been receiving CalEITC collateral information via brief five minute presentations at the various waiting areas inside Mexican Consulate.</p> <p>3) If members of the press attended an event, indicate which press outlets: N/A</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other</p>	

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	

Target Area	1-Los Angeles
Reporting Period	December 1, 2018 - December 31, 2018
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>YPI was not able to hire all promoters during this reporting period. As a result, we were unable to successfully meet our monthly goal of engaging with potential filers during canvassing efforts in targeted and non-targeted zipcodes. However, with the promoters YPI successfully hired, we were able to reach potential filers at community based organizations, schools, and YPI-based centers.</p>	
Narrative of Success Stories	
<p>No success stories at this time.</p>	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Youth Policy Institute		Contract Number: 18T-8001	Report Period: 12/1/18 - 12/31/18	Adjustment: 0
Prepared by (Name/Title): Miriel Thompson / Grant Manager	E-mail Address: miriel.thompson@ypiusa.org	Telephone: 213-688-2802	Fax Number: 213-688-2802	

10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	1,438.00
2.	Social Media	3,447.00
3.	Canvassing	9,425.00
4.	Media	2,105.00
5.	Collateral Messaging	2,760.00
6.	Group Events	4,407.00
7.	Other 1	.00
8.	Other 2	.00
	Total	23,582.00

20 - TOTAL COSTS

1.	Total Costs	23,582.00
	Total	23,582.00

CONTRACTOR'S CERTIFICATION

I hereby certify under penalty of perjury that I am the duly appointed, qualified, and acting officer of the herein named Agency, Department, Board, Commission, Office or Institution, and that to the best of my knowledge, the actual expenditures and activities made during this reporting period contained within this document are in all respects true, correct, and in accordance with the purpose, terms and conditions of the contract referenced above, Federal and State Regulations or other statutes.

Authorized Person (Print Name/Title):
Steven Schultz / Chief Financial Officer

Signature:

Date:
02/01/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date: