

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: INFO LINE of San Diego County		Contract Number: 18T-8004	Report Period: 1/1/19 - 1/31/19	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		270.86	
3.	Canvassing		20,724.67	
4.	Media		18,400.00	
5.	Collateral Messaging		1,649.03	
6.	Group Events		2,212.78	
7.	Other 1		248.00	
8.	Other 2		.00	
	Total			43,505.34
20 - TOTAL COSTS				
1.	Total Costs			43,505.34
	Total			43,505.34
<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 / CFO		Signature:		Date: 03/07/2019
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: 1/1/19 - 1/31/19	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			695.54
2.	Social Media			1,201.95
3.	Canvassing			1,041.63
4.	Media			2,380.82
5.	Collateral Messaging			2,269.29
6.	Group Events			1,172.40
7.	Other 1			665.42
8.	Other 2			1,240.05
	Total			10,667.10
20 - TOTAL COSTS				
1.	Total Costs			10,667.10
	Total			10,667.10
<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: 02/20/2019
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: 1/1/19 - 1/31/19	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	3,207.29		
2.	Social Media	1,089.67		
3.	Canvassing	782.29		
4.	Media	196.65		
5.	Collateral Messaging	157.47		
6.	Group Events	703.43		
7.	Other 1	283.08		
8.	Other 2	.00		
	Total	6,419.88		
20 - TOTAL COSTS				
1.	Total Costs	6,419.88		
	Total	6,419.88		
<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): 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: 1/1/19 - 1/31/19	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		378.25	
2.	Social Media		285.39	
3.	Canvassing		2,609.82	
4.	Media		285.39	
5.	Collateral Messaging		2,885.79	
6.	Group Events		843.14	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			7,287.78
20 - TOTAL COSTS				
1.	Total Costs			7,287.78
	Total			7,287.78
<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 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Ways of California
Grantee Representative	Nalleli Sandoval
Telephone Number	408 823-4452
Email Address	nsandoval@unitedwaysca.org
Contract Number	18T-8018
Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	19,065

Narrative of Expenditures in EARS and Outreach Activities

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

UWCA Staff Time & Benefits = \$1,390.83, Indirect = \$566.26 (Total = \$1,957.09) ; INLAND EMPIRE: None ; INLAND VALLEYS: None; KERN: Staff Time = \$360. MERCED: None. MONTEREY: None. NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: None. NORTHERN CALIFORNIA: None ; NORTHERN SANTA BARBARA: Staff time = \$173. SANTA BARBARA: Staff Time = \$100 SAN LUIS OBISPO: None ; VENTURA: Website updates = \$400 ; WINE COUNTRY: Staff Time = \$40.80

Subtotal: \$3,030.89

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

UWCA worked with vendor to update website look and content, and integrate new chatbot information into the website. INLAND EMPIRE: N/A. INLAND VALLEYS: Host EITC information on organization's website. KERN: Staff time updated all CalEITC and VITA information on the website to reflect current and accurate information. MERCED: No updates. MONTEREY: Host CalEITC information on organization's website. NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: N/A. NORTHERN SANTA BARBARA: Managed DNS of website and displayed CalEITC information on org webpage. SAN LUIS OBISPO: Posted free tax preparation information to their organization website. SANTA BARBARA: Revised EITC/VITA related webpages that went live in Dec. 2018 and responded to website inquires for EITC and VITA services. VENTURA: Redesign of VITA/EITC web page to include new eligibility, option to call 211, CalEITC chart and downloadable flyer. WINE COUNTRY: Running home page news story on website linking to more information about free tax prep including a link on the page to CalEITC information.

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

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	112	Number of Tweets	10
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
The #MLK Day of Service is observed as a "day on, not a day off." Get trained to volunteer to empower individuals, strengthen communities, and move us closer to Dr. King's vision of a "Beloved Community." #MLKDay #MLK90 #MLK2019 [MLK/CalEITC logo		Are you self-employed? The #CalEITC credit helps workers during #tax time, find out if it can help you. http://bit.ly/2BTixq8 pic.twitter.com/jGP8fMERdl	
Number of Other Posts (Instagram, etc.)	26	Exact Messaging of Most-Liked "Other" Post	
		See sample messages below from subcontractors	

Narrative of Expenditures in EARS and Outreach Activities

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

UWCA Staff Time & Benefits = \$1,705.66, Social Media Tools = \$59, Indirect = \$526.66 (Total = \$2,330.91); INLAND EMPIRE: No. ; INLAND VALLEYS: No. ; KERN: Staff Time = \$369.63. MERCED: Staff Time = \$330. MONTEREY: = \$40. NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: None. ; NORTHERN CALIFORNIA: None ; NORTHERN SANTA BARBARA: None. SANTA BARBARA: Staff Time = \$350 ; SAN LUIS OBISPO: None. I VENTURA: Staff Time = \$138.46; WINE COUNTRY: Staff Time = \$27.80

Subtotal: \$3,586.80

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

UWCA worked to develop and share social media editorial content as well as develop new and updated graphics with graphic Designer. INLAND EMPIRE: Facebook and Twitter posts related to health, income, internet access that also included #CalEITC hashtag and information. INLAND VALLEYS: Facebook and Twitter posts for EITC. KERN: Daily posts from UWCA monthly editorial calendar, as well as volunteer recruitment and training, CalEITC awareness day, myfreetaxes.org, and special events. MERCED: Posting CalEITC information/related posts to Facebook, Twitter and LinkedIn. MONTEREY: Use and adapt verbiage from monthly editorial calendar. NORTHERN CALIFORNIA: Utilized "Facebook Live" to promote CalEITC and VITA information. NORTHERN SANTA BARBARA: Posting information to Facebook, Twitter, and Instagram. SAN LUIS OBISPO: Posted Facebook and twitter posts adapted from the monthly social media editorial calendar. 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: Posting of UWCA and UWCA monthly social media editorial calendar. WINE

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019
<p>engagement. VENTURA: Posting of UWCA and UWCA monthly social media editorial calendar. WINE COUNTRY: CalEITC and free tax prep posts on Facebook and Twitter.</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>United Ways of California most liked posts are reflected in earlier section (above). Our subgrantees report the following as most-liked posts:</p> <p>INLAND VALLEYS: FB: United Ways are kicking off #VITA this year helping hundreds of families claim the #CalEITC #EITC #VITAKickOff2019; Twitter: United Ways are kicking off #VITA this year helping hundreds of families claim the #CalEITC #EITC #VITAKickOff2019. KERN: Facebook: Celebrating our annual CalEITC Awareness Day today at the Mercado Latino! As you can see it was a great success. Thank you to our partners, Mexican American Opportunity Foundation, Visión y Compromiso, Kern County Department of Child Support Services, and Self help federal credit union for coming and supporting us on this day. Also we want to give a big thanks to Gilberto Arias for donating the pan dulce. For those of you who are unaware of CalEITC, it is a tax credit given to benefit California's working families and has now been open to benefiting 18 years olds for a larger refund as well. Make sure to ask your tax perpetrator about this credit! #CalEITC #EITC #VITA #KVP; Twitter: We need more volunteers! Come meet new people, make friends and join others across the state as we prepare taxes for free to help workers claim the #CalEITC, a cash-back refund that helps put more \$ in the pockets of those who need it during tax time. http://bit.ly/20TomrP. MERCED: Facebook: Are you self-employed #CalEITC, Twitter: Did you know? The largest population of EITC recipients are single mothers! #CalEITC #EITC. MONTEREY: Facebook: Young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now https://bit.ly/1Q3vjAs; Twitter: Join the nearly 1,500,000 Californians who claimed over \$346,000,000 in #CalEITC last year! For example, 13,617 Monterey County workers claimed \$3,432,510 in CalEITC last year, could you join them this year?; Other: Young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now. NORTHERN SANTA BARBARA: FB/Twitter: Our New Year's Resolution is to let you all know about money your family can be saving. We think it's a pretty good resolution. Click below to see if YOU and your family can save during this tax season by qualifying for the California Earned Income Tax Credit. Insagram: "MYFreeTaxes.org. Find out what YOU can save." . SAN LUIS OBISPO: Facebook: The EITC helps local workers keep more of what they earn to pay for things like childcare, groceries, and car repairs to get to work. We help thousands of local families claim the EITC through our tax preparation sites, pumping money back into local economies. Yet, under current law, millions are largely excluded from the EITC and actually taxed into poverty. You can help change that. Join us, visit www.unitedwayslo.org/tax-preparation-programs. Twitter: Get involved! #CalEITC is a tax-time cash-back refund for workers. You could help your community get the money that it deserves! Volunteer today on http://www.volunteerslo.org. http://bit.ly/20TomrP pic.twitter.com/EDSW4iEDZP. SANTA BARBARA: Young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now. https://www.irs.gov/credits-dedu.../.../earned-income-tax-credit, #LiveUnited #UnitedWaySB #taxtime, Other: We need more volunteers! Come meet new people, make friends, and join others across the state as we prepare taxes for free to help workers claim the #CalEITC, a cash-back refund that helps put more \$ in the pockets of those who need it during tax time. VENTURA: FB/Other: Last year, we helped 572 families claim their #EITC...make sure you're part of that group this year! Get your necessary documents together and #Dial211 for your #VITA appointment. (with image of necessary documents), Twitter: DYK...Research on EITC's effects on single moms' employment shows that counting the employment-boosting effect of the EITC nearly doubles</p>	

Target Area	15-Statewide	
Reporting Period	January 1, 2019 - January 31, 2019	
<p>single mothers' employment and we are counting the employment boosting effect of the EITC nearly doubled its anti-poverty effect! Support for the #CalEITC is support for single mothers! Learn more https://bit.ly/1OSCCOK. WINE COUNTRY: FB: We need more volunteers! Come meet new people, make friends and join others across the state as we prepare taxes for free to help workers claim the #CalEITC, a cash-back refund that helps put more \$ in the pockets of those who need it during tax time. http://bit.ly/20TomrP. Twitter: Get involved! #CalEITC is a tax-time cash-back refund for workers. You could help your community get the money that it deserves! Volunteer today. https://t.co/tvRfK9VanC</p>		
Canvassing		
	Zip Code/Method of Outreach	Interactions
	Canvassing in Targeted Zip Codes	0
	Canvassing in Non-Targeted Zip Codes	2092
	New Individuals Who Received Text Messages	0
	Phone Calls	204
	Office Visits	40
Narrative of Expenditures in EARS and Outreach Activities		

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

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

UWCA Staff Time & Benefits = \$3,205.32, Text Messaging Tools = \$916.66, Indirect = \$566.26 (Total = \$4,688.23); INLAND EMPIRE: No. ; INLAND VALLEYS; No. KERN: Staff Time = \$369.63. MERCED: Staff Time = \$550. MONTEREY: Canvassers = \$5,000; NORTHERN CALIFORNIA: None ; NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: Staffing = \$1210, Mileage = \$347 (Total = \$1,557) ; SANTA BARBARA: Staff Time = \$400, Outreach Orientation for Volunteers = \$500 (Total = \$900); NORTHERN SANTA BARBARA: Staff Time = \$99. SAN LUIS OBISPO: No . VENTURA: No ; WINE COUNTRY: .No.

Subtotal: \$13,163.86

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

3) Provide a broad overview of canvassing for non-targeted zip codes: KERN: Conducted canvassing efforts in the following zip codes: 93305, 93306, 93307, 93241 (Total = 765) MERCED: Conducted canvassing efforts in the following zip codes: 95333,95340,93541 - canvassing conducted at events like Yosemite high school health and wellness fair, Dr. Martin Luther king Jr. Celebration march, Church event following Dr. King event, LCAP meeting, South Merced Council (group of Seniors who are trying to make a difference in Merced), .South Merced PIQE . (Total - expected in February) MONTEREY: Canvassing through resident leaders at various locations like churches, libraries, social security offices, college classes at Hartnell, family members to distribute at their workplace, parks, outside at markets, neighbors, and community meetings. Canvassing in targeted zip codes included East Salinas, Gonzalez, Soledad and Seaside - primarily low-income communities. (Total = 1,127 reached, 340 in zip codes: 93905, 93926, 93960, 93955). NORTH COAST OPPORTUNITIES: Canvassing at County of Mendocino Social Services Office (Ukiah, Fort Bragg), Ukiah Farmers Market, Mendocino College Ukiah and Lakeport Campus. NORTHERN SANTA BARBARA: Canvassing on CalEITC/Free Tax prep information at Healthy Food Pantry monthly gathering. (Total = 100). SANTA BARBARA: Canvassed Individuals in Santa Barbara County (Total = 100)

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

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: INLAND EMPIRE: Provide clients calling for financial services with information about CalEITC and closest VITA location.(Total = 44) SANTA BARBARA: Community Impact Associate phoned community partners to coordinate EITC efforts and delivered three community presentations/distributions of materials for their clients at low-income apartment complexes. Calls and visits were also made to key community partners to ensure that they also would help drive clients to this year's VITA sites. Site schedules were left in their lobbies for their clients. (Total = 160).

OFFICE VISITS: SANTA BARBARA: VITA Site Coordinators and volunteer tax preparers were trained to prepare taxes and follow best practices for tax preparation. Special emphasis was placed on updates for EITC eligibility to help them maximize the number of clients receiving their credit (Total = 40)

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

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads				
Public Services Announcements (Radio)	32	50,000	30	22,000
Paid Television Ads				
Public Services Announcements (T.V.)	1		1	45,000
Billboards				
Transit Advertisements	95	255,000	95	255,000
Internet/Website Ads				
Social Media Promoted/Boosted Ads	4	41,518		

Narrative of Expenditures in EARS and Outreach Activities

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

1) List the various activity-expenditures charging for this month and their cost:
 UWCA Staff Time & Benefits = \$1705.66, Indirect = \$566.26 (Total = \$2,271.91); INLAND EMPIRE: No. ; INLAND VALLEYS: No. ; KERN: Staff Time = \$369.63, Boosted Ads \$65 (Total = \$434.63) MERCED: Staff Time = \$220. MONTEREY: Staff Time = \$60, Bus Ads placement and printing, = \$3,748.81 (Total = \$ 3,802.81), NORTHERN CALIFORNIA: None ; NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: No.; SANTA BARBARA: ; NORTHERN SANTA BARBARA: Boosted Ad Placement = \$350. SAN LUIS OBISPO: No cost, . VENTURA: No ; WINE COUNTRY: Staff Time = \$350, Transit Ads = \$9,450, Boosted Ads = \$370.10 (Total = \$10,170)

Subtotal: \$17,249.35

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: United Ways of California has been working to give feedback and track media placements as well as coordinate media outreach efforts. KERN: https://www.kget.com/telemundo/nuestra-comunidad/programa-vita-de-preparacion-de-impuestos_20190125213627/1726386059 . MERCED: Working on placement of billboard, banner, as well as radio and digital media ads. Impressions to be reported later. MONTEREY: The TV ads ran on the following stations: KSMS, KDJT, KCBA and KSBW 8 NBC, KSBW Central Coast ABC AND Estrella TV. The Radio ads run on the following stations: KLOK-FM, KSES-FM, KWAV-FM Please note about the older VITA PSA: During the month of January, the following VITA PSA ran in the above stations: <https://youtu.be/LU6W2KWpKCg>. Please note about the new VITA PSA: In the month of January, United Way Monterey County worked on the new VITA-free tax prep PSA. CalEITC is mentioned in the PSA. This new creative will be on air starting February. UW Monterey will report accordingly. NORTHERN CALIFORNIA: Appeared on four local radio talk shows Jan. 29, including market leader KNCR 1460 with Carl Bott and Jim Bremer.APP. No metrics to report at the moment. NORTHERN SANTA BARBARA: https://www.facebook.com/NorthernSantaBarbaraCountyUnitedWay/posts/2038080489638558?__tn__=-R; SAN LUIS OBISPO: TV and Radio PSA is attached. Rick London, CEO and Linda Wingert, Director of Community Engagement were guests on the Dave Congalton Radio Show (<https://www.920kvec.com/show/dave-congalton-hometown-radio/>) on January 17, 2019 discussing United Way's My Free Taxes, CalEITC and VITA programs and services offered locally in SLO County. Transcript link: Thursday appearance on the Dave Show: <https://goo.gl/pkgHLG>. **No metrics have been collected for it yet.** WINE COUNTRY: Placement of transit ads on 10 buses for January and beyond. Have not received impression information on ads yet. Social media posts includes English sponsored post with information about Earn It! Keep It! Save It! and it mentions CalEITC (Boosted Ad Impressions = 38,853).

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: Please see response above.

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	32,766
Number of New Individuals who Received Direct Mailers	48,620

Narrative of Expenditures in EARS and Outreach Activities

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

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

UWCA Staff Time & Benefits = \$1,390.84, Indirect = \$566.26 (Total = \$1957.09) ; INLAND EMPIRE: No. ; INLAND VALLEYS: No.; KERN: Cost for collateral messaging = \$522.79. MERCED: Staff Time = \$330. MONTEREY: Printing = \$659.17 NORTHERN CALIFORNIA: ; NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK: No.; SANTA BARBARA: Printing = \$300 ; NORTHERN SANTA BARBARA: Content Creation = \$22, Production = \$500 (Total = \$522). SAN LUIS OBISPO: Printing Costs = \$111. VENTURA: Staff Time = \$138 ; WINE COUNTRY: Direct Mailer Cost = \$15,007.37

Subtotal: \$19,547.42

2) Provide a broad overview of flyer/brochure and poster distribution: United Ways of California has been working to develop, print and distribute CalEITC postcards. INLAND EMPIRE: Distribute flyers at outreach events throughout San Bernardino County (80 total). INLAND VALLEYS: Attended multiple chamber of commerce events and workplace events and distributed materials at these events (1,500 total). KERN: Flyers distributed at Boys and girls club, School Readiness Program, Advanced America, Rio Acai, Arvin Family Resource center, Delano Bakersfield College Raffaello Palla Elementary, Kern County Child Support, East High School, Mercado Latino, Martin Luther King Center, EDD Office, Point in Time Homeless Count resource fairs Outback Steakhouse, City of Shafter, Migrant Education, FAFSA Workshops across Kern County, Lamont School District, Self Help Federal Credit Union, Caterpillar, Target (12,750 total) MERCED: Approving, compiling and distributing collateral materials in the community. MONTEREY: Printing and distribution of flyers to share with partners. (Total = 354). NORTH COAST OPPORTUNITIES: Flyers distributed at Senior Housing, Head Start preschools, Farmers Markets, Social Service offices, Family Resource Center, Public Health Offices and hospital and medical facilities (592 English, 285 in Spanish = Total 877 flyers). NORTHERN CALIFORNIA: Materials distributed to the following partners Norcal Services for the Deaf, Woodlands Housing Development, North Valley Employer Advisory Council members, EDD, Redding Chamber of Commerce (Total = 1,980). SANTA BARBARA: Fliers were distributed to all VITA sites, as well as dozens of community partners serving target populations to drive attendance to VITA and to raise awareness of EITC (Total = 1,625). SAN LUIS OBISPO: Printed and distributed flyers (Total = 300). VENTURA: Flyers distributed to clients/residents at all VITA locations; sent to all County of Ventura Human Services Agency clients with earned income; distributed at 3 housing authorities, 3 community based organizations, one community fair, 5 community coalitions, and multiple food pantries. Flyers given to 5 legislative offices to distribute. Assemblymember Limon's staff distributed flyers to the Mexican Consulate and to restaurant and hotel employees in downtown Oxnard and Ventura (Total = 10,000). WINE COUNTRY Staff shared information with local businesses and emails including flyers, banner ads to use in intranet, and encouraging them to share broadly with those that might qualify for the program (Total = 300).

3) Provide a listing and narrative of direct mailers that went out: WINE COUNTRY Produced direct mailer for targeted low-income households (Total = 48,620),

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	San Bernardino		70	
Community Gathering	San Bernardino		70	

Target Area	15-Statewide			
Reporting Period	January 1, 2019 - January 31, 2019			
Mega Event	92507	01/31/19	2500	No
Educational Forum	92501	01/19/19	400	No
Educational Forum	92551	01/23/19	150	No
Community Gathering	93305	01/25/19	300	No
Educational Forum	93306	01/25/19	20	Yes
Resource Fair	95340	01/17/19	50	No
Community Gathering	95340	01/21/19	750	Yes
Church	95341	01/21/19	30	No
Community Gathering	95341	01/30/19	10	No
Community Gathering	95341	01/31/19	15	No
Community Gathering	93905	01/30/19	100	No
Community Gathering	93960	01/30/19	372	No
Community Gathering	93955	01/31/19	400	No
Community Gathering	93927	01/31/19	255	No
Educational Forum	93030	01/31/19	5	No
Educational Forum	93036	01/28/19	4	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 & Benefits = \$1,390.84, Travel Costs for meetings with partners = \$92.48, Indirect = \$566.26 (Total = \$ 2,049.57) ; INLAND EMPIRE: No. ; INLAND VALLEYS; No. KERN: Staff Time = \$369.63. MERCED: Staff Time = \$220. MONTEREY: No.. NORTHERN CALIFORNIA: No ; NORTH COAST OPPORTUNITIES VOLUNTEER NETWORK;No ; SANTA BARBARA: No ; NORTHERN SANTA BARBARA: No. SAN LUIS OBISPO: Program Coordination Costs = \$682.65 . VENTURA: Staff Time = \$33.36 ; WINE COUNTRY: No.

Subtotal: \$3,355.21

2) Provide a brief overview of events conducted during the reporting period: United Ways of California has met with different state partners to discuss new expansion eligibility including Horizontal Integration groups. INLAND EMPIRE: Provide clients with EITC and CalEITC information during

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019
<p>CalFresh program events (140) INLAND VALLEYS: Mega mixer - traffic is incentivized to visit all booths - two staff members were present to speak with all attendees. Staff also visited all vendor booths to talk about benefits of EITC with employers. MLK Volunteer Day - 4 UWIV staff attended volunteer event with local large hospital system. Made presentation to employees about UW's work with EITC and VITA. Chamber breakfast - 3 staff attended chamber breakfast and UWIV was featured speaker. One featured part of presentation was EITC and CalEITC and VITA. KERN: Both events were CalEITC Awareness Day events: one that United Way put together at the Mercado Latino, where we invite community partners to have resource tables while bringing awareness to CalEITC and EITC. Another is one we put together jointly with Community Action Partnership of Kern. MERCED: UW Merced was invited to attend and speak at 5 community events MONTEREY: Distribute CalEITC information during group events in Salinas, Soledad, Seaside, and Greenfield (Total = 1,127). SAN LUIS OBISPO: Staff time to coordinate information events on EITC/Free Tax Prep (No metrics to report yet). VENTURA: Presentations at financial literacy workshop sponsored by local credit union, and 2 resident meetings with Oxnard Housing Authority. (Total = 9)</p> <p>3) If members of the press attended an event, indicate which press outlets: MERCED: During this Report Period we had our 23rd Annual Dr. King Celebration and ABC30 and KSEE 24 were in attendance along side our local Merced Sunstar and Central Valley Voice.</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other</p>	

Other	
Category	Actual (#)
211 Hold Message	6,302

Narrative of Expenditures in EARS and Outreach Activities

Expenditures: UWCA: Indirect costs totalling \$566.26. Inland Empire: No expenditures. SAN LUIS OBISPO: Program Management and Indirect Costs = \$183.15

Subtotal: \$749.41

ACTIVITIES:

UWCA has been working with Motor Vehicle Network to produce ad copy and get placement on local Dept Motor Vehicle locations. Also worked to research and place movie theatre ads in strategic locations like Bakersfield, and Merced.

211 Hold Message: Inland Empire United Way placed hold message where approximately 6,302 people heard it.

SAN LUIS OBISPO: Planning meetings, content development and VITA/EITC Outreach volunteer

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019

orientation.

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Some subgrantees, particularly those who receive IRS VITA grants, reported the challenge was the uncertainty of the government shutdown. Some subgrantees have been asked why someone with an ITIN number is not able to apply for the CalEITC funds.

Narrative of Success Stories

Success Story #1

Date of Success Story: 1/11/2019

Name of Person from Success Story: Patricia Vega

Zip-Code Where Person Lives: 93311

VITA Site where person got taxes done (if applicable): Patricia Vega is a VITA Volunteer success story. She is a spanish speaking volunteer who had been seeking for a place to volunteer and feel useful. Due to the language barrier, Patricia had felt that she would not be a good fit for VITA. However, when she saw the volunteer recruitment segment on the spanish news, she called to inquire about spanish language training and signed up. She finished the training and has become a volunteer, giving of her time almost daily. This has been life-changing for Patricia because she is alone in Kern County - no family. She divorced last year and her three children all went out of town to college. She is also a recent cancer survivor. The time that she is at a VITA site, Patricia focuses on helping others with their returns and feels immediate gratification doing so.

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):

Target Area	15-Statewide
Reporting Period	January 1, 2019 - January 31, 2019
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 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	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	56,596

Narrative of Expenditures in EARS and Outreach Activities

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

- Website Updates and Management: \$4,500
- Calculator Tool: \$5,000
- Free Tax Preparation Locator tool: \$10,000
- Microsites: \$15,000
- New Pages: \$3,000
- Admin: \$1,125 (GSO staff \$75/H - 15 hours)

Web Total: \$38,625

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

Website Updates and Management

Finalized all website content and language to reflect eligibility requirements for 2018 Tax year. Updates to pages include: Cal EITC Fact page, Federal EITC fact page, Self-employed page, other public benefits page

Updated Website homepages rotationals with 7 new graphics linking to specific pages on the site.

Calculator Tool

EITC Calculator now updated and operating in all languages. Costs include GSO staff time to work with Intuit to provide code for calculator on website. GSO web developer took code and updated the tool on website.

Free Tax Preparation Locator tool

FTP tool updated with new VITA sites and operating in all languages. GSO worked with FTB to get new list of VITA sites. Tool also includes AARP sites.

New Microsites

CalEITC4Me.org is has webpages available in Korean, Tagalog, and Russian. Webpages include basic

Target Area	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019
<p>Cal EITC information and Tax Calculator.</p> <p><u>New Pages</u> GSO has created new webpages for newly eligible population including Young Adults aged between 18-24, and older adults aged over 65.</p> <p>We have also created a new partners pages that helps partners get the resources they need to help spread awareness of the expanded Cal EITC.</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>	

Social Media

Number of Facebook Posts	27	Number of Tweets	32
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Tax documents are on their way, do you know if you're eligible for the EITC? Check out our calculator to find out your estimated cash back from the California and Federal EITC! https://caleitc4me.org/earn-it/ State of California Franchise Tax Board		Our op-ed in the @mercnews on the one-two punch of the #CalEITC: fighting poverty while strengthening CA's economy. @GavinNewsom 's plan will make this economic tool TWICE as strong. @JosephNSanberg & @JoshFryday.	
Number of Other Posts (Instagram, etc.)	14	Exact Messaging of Most-Liked "Other" Post	
		100 Passionate advocates here in Sacramento today fighting to #endPoverty.	

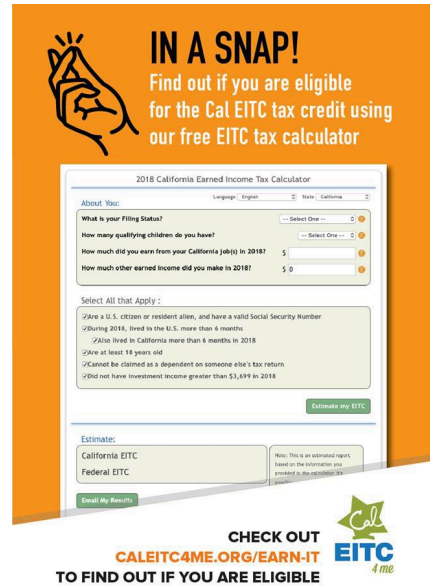
Narrative of Expenditures in EARS and Outreach Activities

<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Social Media Toolkits: \$2,500 Message and Content Development: \$1,500 Social Media Total: \$4,000</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p>

Target Area	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019

During the month of January, GSO social media outreach included creating a federal EITC awareness toolkit, and creating social media graphics for partners to share.

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:



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	1750
Phone Calls	0
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019

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

Texting Costs: \$40,194 (To cover all statewide texts thru end of grant)

Texting Management: \$4,250 (75/H - 56.666 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:

The texting program began slowly in January, with **1,750 texts**, most through follow-ups to sign-ups on website or those that have texed EITC to 555-888. The reason the expense is so high is that GSO has pre-paid Relay (Texting Software) to drive down costs. Relay base price is \$.08 per text, the prepayment allows us to have a price of \$.06 per text.

We will be sending multiple texts to over 74,000 contacts throughout the grant period.

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

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	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019

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

Digital Ads: \$1,397.25 (No Ads running yet. Expenses for consultant retainer to create digital plan)
 Earned Media Press: \$4,000 (Comms Manager Salary and Press consultant)
 Ethinc Media Print: \$10,000
 Ethnic Media Digital: \$10,000
Total Media: \$25,397

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 Ads currently running. Digital Ads on Facebook will run at the end of February early march. GSO believes it is more effective to spend funding on FB Ads after the "beginning" of tax season is over. Most workers that file early do not need to be marketed. Ad plan includes testing many different messages and images before adjusting ads to best performing. We will also be running ads in new languages.

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:

Expenses for Ethnic Media Print and Digital are the upfront payments for Penny Empire (PE) to provide media placement and content creation services for the CalEITC4Me California Campaign.

PE will provide placement of full & half page color ads in community newspapers throughout California. Ads will be placed in each paper prior to April 15th, 2018. Earned media, digital newsletter placements, and social media sharing of additional content will be provided at an added value. PE anticipates a minimum circulation of 400,000 for all display ads.

2. PE will produce up to five (5) animated videos highlighting important aspects of the CAEITC4ME campaign. The videos will be formatted and provided to GSOF for publication on CAEITC4ME social media platforms.

3. PE will provide a placement of up to four (4) articles and/or OpEds published.

4. All creative and design requirements for the campaign will be provided by PE, including but not limited too: newspaper display ads, voice overs, scripts, video production, video post production, color correction, motion graphics, etc.

5. PE will provide digital ads, a combination of targeted email newsletters and web banners, for English, Spanish, Mandarin, Vietnamese, Tagalog, Russian, and Korean audiences. The ads will link back to the GSOF created micro-sites. GSOF will be responsible for providing all copy necessary for these ads. PE anticipates a minimum of 1,000,000 impressions.

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

Target Area	<u>15-Statewide</u>			
Reporting Period	January 1, 2019 - January 31, 2019			
	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>Collateral Production Design: \$10,000 (costs include translations)</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>So far, GSO has only distributed flyers through the regional Grants. GSO will distribute collateral to statewide partners after Partner convening in Sacramento on Friday Feb. 15. We have also provided FTB materials and small amounts to partners at various meetings.</p> <p>Expenses include GSO staff time, consultant costs, and translation services. GSO has created and updated 6 different collateral pieces available in 7 languages.</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>				
Group Events				
Total Number of Events Held During the Reporting Period			0	
Location	Zip Code	Date	Attendance	Press at Event?

Target Area	<u>15-Statewide</u>			
Reporting Period	January 1, 2019 - January 31, 2019			

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:
- 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:

Other

Category	Actual (#)
Texting Trainings	2

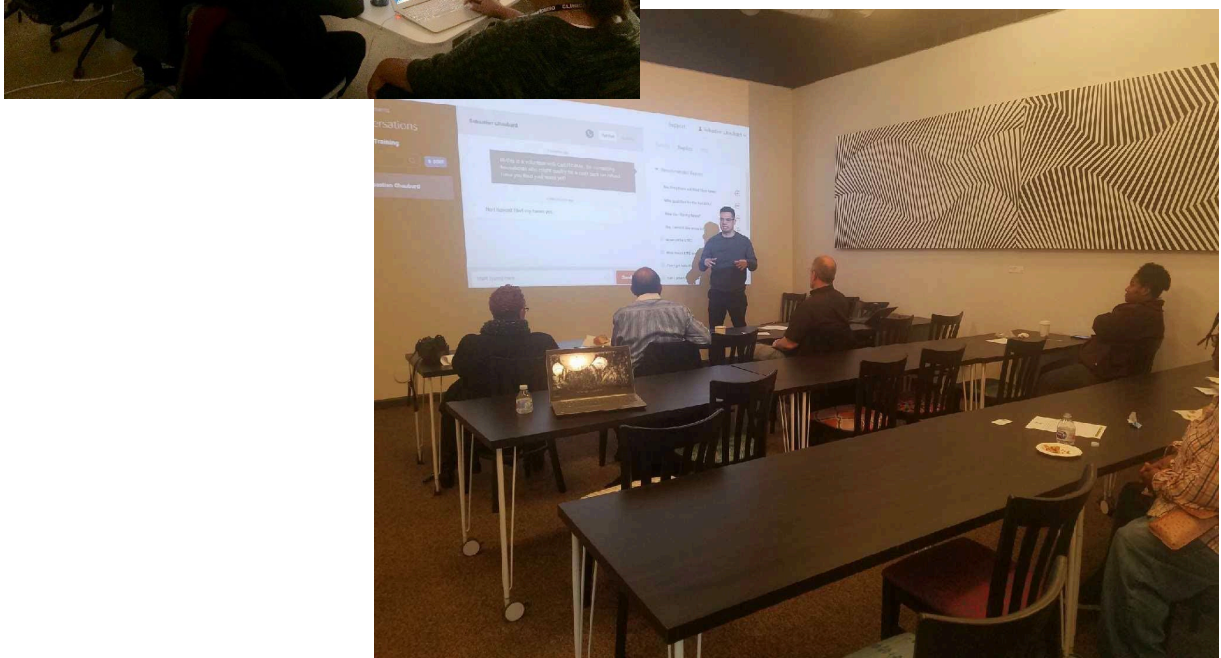
Narrative of Expenditures in EARS and Outreach Activities

Texting Trainings: \$5,000 (includes travel expenses)
 Partner Coordination: \$5,000 (includes monthly webinar set-up and GSO staff time for engagement on Social Media)

GSO help two texting trainings in the month of January to prepare for Mass texting program to begin in February. The first was held in Los Angeles, and the second was held in Riverside. There were more than 15 organizations to attend.



Target Area	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019



Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

One challenge was the Federal Government shutdown and waiting for the IRS list of VITA locations.

Narrative of Success Stories

No Success stories to report at this time.

Target Area	<u>15-Statewide</u>
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

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:

- 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	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

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

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:

Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

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	1100
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 Costs (Relay): \$21,000
 Texting Manager: \$1,050 (\$75/H - 14 Hours)
Total Canvassing: \$22,050
- 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:
 The texting program began in January with 1,100 texts sent through follow-up to sign-ups on

Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

The texting program began slowly in January, with **1,110 texts**, most through follow-ups to sign-ups on website or those that have texted EITC to 555-888. The reason the expense is so high is that GSO has pre-paid Relay (Texting Software) to drive down costs. Relay base price is \$.08 per text, the prepayment allows us to have a price of \$.06 per text.

GSO is testing 4 different messages

Treatment 1: Basic Informational Message + Link

Hi-this is _____ 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 Visit caleitc4me.org/earn-it to learn more about your eligibility and to claim your EITC refund.

Treatment 2: Promote Hotline

Hi-this is _____, 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. Call 211 to get free help with filing your return and to claim your EITC refund.

Treatment 3: Offer Text-based Assistance

Hi-this is _____ 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. Text "yes" and I can help you claim your EITC refund.

Treatment 4: Benefit Value

Hi-this is _____, 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. Eligible families got back an average of \$2,000 last year. Text "yes" and I can help you claim your EITC refund.

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:

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				

Target Area	14-Rural			
Reporting Period	January 1, 2019 - January 31, 2019			
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 Social Media Ads: 1,431.50 (Consultant Retainer + GSO staff time)
 Digital Ethnic: \$6,000
 Print Ethnic: \$5,000
Media Total: \$12,431.50

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 Ads currently running. Digital Ads on Facebook will run at the end of February early march. GSO believes it is more effective to spend funding on FB Ads after the "beginning" of tax season is over. We will also be running ads in new languages and targeting newly eligible population 18-24 and 65+ populations.

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:

Expenses for Ethnic Media Print and Digital are the upfront payments for Penny Empire (PE) to provide media placement and content creation services for the CalEITC4Me California Campaign. PE will provide placement of full & half page color ads in community newspapers throughout California. Ads will be placed in each paper prior to April 15th, 2018. Earned media, digital newsletter placements, and social media sharing of additional content will be provided at an added value.

Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

added value.

Penny Empire wil help place Ads in both print and digital outlets in the Rural regions.

PE will provide digital ads, a combination of targeted email newsletters and web banners, for English, Spanish, Mandarin, Vietnamese, Tagalog, Russian, and Korean audiences. The ads will link back to the GSOE created micro-sites. GSOE will be responsible for providing all copy necessary for these ads. PE anticipates a minimum of 100,000 impressions.

The print ads will reflect our Digital/Social Graphics and will run in the outlets on March 22, and April 3.



Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019



Example of Digi

We will be AB testing our Ads to go with text and without text.



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

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

Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

- 1) List the various activity-expenditures charging for this month and their cost:
- 2) Provide a broad overview of flyer/brochure and poster distribution:
Collateral pieces will be distributed in February, March, and April. A portion of the collateral messaging in Rural counties will be post-tax day outreach.
- 3) Provide a listing and narrative of direct mailers that went out:
- 4) Any other additional information pertinent to work conducted including leveraging of other resources:

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

Target Area	14-Rural			
Reporting Period	January 1, 2019 - January 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
- 2) Provide a brief overview of events conducted during the reporting period:
- 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	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

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Other

Category	Actual (#)
GSO Admin	0

Narrative of Expenditures in EARS and Outreach Activities

<p>GSO Admin Costs: \$625 (GSO Staff time to support Rural grant, includes time to complete progress reports, attend SIT meeting/coordination calls, and planning discussions with co-grantee ATCAA.</p>

Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019

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:

Target Area	14-Rural
Reporting Period	January 1, 2019 - January 31, 2019
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 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Amador Tuolumne Community Action Agency
Grantee Representative	
Telephone Number	
Email Address	
Contract Number	
Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	207

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Occupancy costs for web research/design staff/office: \$71.97,
 Web partnering research and web ad design staff: \$296.71,
 Bilingual messaging staff, \$326.86,
 Total: \$695.54

2) Provide a narrative of education and outreach activities conducted during the month under web:
 Continued research and data gathering for current and potential partners. Contacting organizations to get permission and obtain direct contact with organization's webmaster for info /ad placement. Designed and updated info for ATCAA.org/eitc specific page. Began design elements for mycaleitc.org 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: WIC, First 5, The Resource Connection and Amador public Health agreed to post info on thier website. ACN - A community news site, agreed to poston thier community news site at no charge.

Of note: Due to ATCAA's foothill service area and the geographic range of the rural areas, ATCAA maintains a CalEITC page on it's ATCAA website for those within ATCAA's service area. Additionally, it maintains a mycaleitc.org website that is essentially a landing page that directs folks to the caleitc4me.org site. The landing page was created in 2017 to direct visitors that reside outside of ATCAA's service area from social media and other sources to a site that was not regionally specific.

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	47*	Number of Tweets	1
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Aun si no necesita declarar sus impuestos podria recibir efectivo del Estado de California con el reembolso #CalEITC! Averigüe si es elegible visitando mycaleitc.org o envíe un mensaie con "EITC" al 555-		Posted for EITC awareness day.	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
1		N/A	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Social media video production: \$192.96
 Social media development staff: \$668.24
 Social media design/development: \$180.51
 Occupancy costs for social media staffing: \$160.24,
 Total: \$1201.95

2) Provide a narrative of education and outreach activities conducted during the month under social media: through geo-targeting, especially in the Spanish community, reach is gaining real traction. The mycaleitc FB page, created to outreach to rural California resident's outside of ATCAA's service area has become an excellent Spanish platform and we'll continue to message as such.

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: Continuing to identify FB groups and find localized influencers. Set up a mycaleitc Instagram and began using ATCAA Instagram and will look to organically grow audience moving forward.

*5 posts on mycaleitc FB page, 3 posts on ATCAA FB page, 39 posts into FB discussion groups and message boards = 47 posts.

*Translated:
 Even if you don't need to declare your taxes you could receive cash from the state of California with the refund # Find out if you are eligible by visiting mycaleitc.org or send us a message with "Eitc" at 555-888 #

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	481
Canvassing in Non-Targeted Zip Codes	N/A
New Individuals Who Received Text Messages	N/A
Phone Calls	See Other 2
Office Visits	See Other 2

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Bilingual outreach staff: \$481.49,
 Mileage vehicle costs for outreach staff for meetings/training & outreach: \$384.61,
 Canvassing Supplies: \$31.57
 Occupancy costs for outreach staff: \$143.96,
 Total: \$1,041.63

- 2) Provide broad overview of canvassing for targeted zip codes: As outlined in Spcope of work, limited canvassing is being done within our own service area, particularly in bilingual areas. Zip codes canvassed in January were 95310, 95370, 95372, 95373, 95379, 95383,

- 3) Provide a broad overview of canvassing for non-targeted zip codes:
 No canvassing in January for non-targeted zip codes.

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

- 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. The phone calls we conduct are to potential partner agencies, listed in Other 2, rather than to individuals.
- 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: Other resources include partner agencies who helped us canvass to low income apartment complexes.

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	8	12,036	0	0
Paid Radio Ads	30	8,600	0	0
Public Services Announcements (Radio)	30	9,800	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	1	22,000	0	0
Social Media Promoted/Boosted Ads	1	394	5	14,685

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: \$1,049.05
 Bilingual media ad design/messaging and placement staff: \$326.86,
 Paid ad placement: \$725.00
 Occupancy costs for Media staffing: \$279.91
 Total: \$2,380.82
- 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: Print and digital ads ran in MyMotherlode.com and Leger Dispatch. Radio ads on KVML & KZSQ. Working to get Spanish radio stations to run PSA's and ads. Ran geo-targed ads on Facebook primarily in Spanish.
- 3) Provide information on whether or not any earned media obtained during the month. For each earned

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019
<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: Earned media on Mymotherlode and KVML/KZSQ. See attached.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: N/A.</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	7,270
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: \$77.70,
 Design software, \$422.17,
 Occupancy costs: \$268.61,
 Design staff: \$1,173.95,
 Bilingual design/messaging staff: \$326.86

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Total: \$2,269.29

2) Provide a broad overview of flyer/brochure and poster distribution: Combination of posters and flyers hung. Distributed FTB brochures, in-house-CSD approved postcards, flyers and business card sized messaging. Areas distributed were Tuolumne, Sutter and Yuba counties. In Tuolumne County, approximately 1/8 of the materials were in Spanish compared to Yuba/Sutter where English and Spanish were about even.

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: Developing Spanish messaging for next target location in the North Coastal areas.

Group Events

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

Target Area				
Reporting Period	January 1, 2019 - January 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Staffing and travel costs related to participating in, establishing events/creating and maintaining events and calendar; \$568.30,
 Bilingual staffing and research: \$326.86,
 Occupancy costs: \$98.37
 Event outreach communication and equipment costs, \$58.87
 Booth fees: \$120.00

Total: \$1,172.40

2) Provide a brief overview of events conducted during the reporting period: Secured booth space at Dandelion Days. A 2-day community-wide free event in Amador County. Researched and secured space at several year-around farmers markets in neighborhoods in rural counties with the likelihood of reaching our target audience.

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: Head Start, The Resource Connection and First 5 are committed to providing our materials at Children's Fairs throughout the region that often provide these events free to families during the designated "Week of the Young Child" in April. We will attend where we can and use partners to help relay messaging where we can not.

Other -

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019
Category	Actual (#)
Canvass to Businesses	47
Canvass to Potential Partners	43

Narrative of Expenditures in EARS and Outreach Activities

OTHER 1- CANVASS TO REGIONAL BUSINESSES.

Supplies and equipment needed to secure business and organization partnerships: \$31.50,
Occupancy costs for staffing: \$,105.85
Staffing needed to research, develop and maintain business and partner lists, communicate and strategize needs including data collecting methods: \$201.21,
Bilingual Outreach Staffing: \$326.86
Total OTHER 1 : \$665.42

OTHER 2 - CANVASSING TO REGIONAL PARTNERS.

Communications equipment: \$59.40,
Equipment, supplies, copying: \$71.94,
Occupancy costs for canvassing support staff: \$112.34,
Canvassing support, research data collection staff, \$669.51,
Bilingual research and canvassing support staff, \$326.86
Total OTHER 2: \$1240.05

First outreach tour conducted in Yuba/Sutter counties. Also targeted businesses and potential partners in Amador, Calaveras, El Dorado and Tuolumne Counties.

Continued planning and establishing new contacts for regional tours to target zones in 6 remaining identified rural counties including Butte.

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.

SEE ATTACHED "OUTREACH TOUR REPORT" for detailed information on Yuba/Sutter tour.

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Weather/Government Shutdown. Weather in the foothills hampering abilities on many levels. Fine line between promoting EITC and where you can get taxes filed if tax volunteers are snowed in and site can not open. Government shutdown caused delays/concerns in getting sites and volunteers ready and open for season.

Narrative of Success Stories

No success stories reported for January. Most tax sites opening end of Jan or after.

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:

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	CAC of Santa Barbara
Grantee Representative	
Telephone Number	
Email Address	
Contract Number	
Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

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:

- 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	
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

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

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:

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

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

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

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

conducted this month:

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:
- 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	
Reporting Period	January 1, 2019 - January 31, 2019

Collateral Messaging

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

Narrative of Expenditures in EARS and Outreach Activities

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

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

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

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

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

Group Events

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

Target Area				
Reporting Period	January 1, 2019 - January 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

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

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

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:

Other

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

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:

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

Web

Category	Metrics
EITC Website Hits	112

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
JP Marketing Subcontractor Fees for website updates = \$190.00

2) Provide a narrative of education and outreach activities conducted during the month under web:
 Update CalEITC 2018 webpage with links and images linked to FTB site calculator.

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

Social Media

Number of Facebook Posts	17	Number of Tweets	17
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now. http://bit.ly/2BTixq8 #EITC</p>		<p>United Ways are kicking off #VITA this year helping hundreds of families claim the #CalEITC #EITC #VITAKickOff2019 pic.twitter.com/Rypd36vSJD</p>	
		Exact Messaging of Most-Liked "Other" Post	

Target Area	12-Fresno	
Reporting Period	January 1, 2019 - January 31, 2019	
Number of Other Posts (Instagram, etc.)	4	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
JP Marketing Subcontractor Fees Social Media updates = \$95.00

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 January and other posts to promote CalEITC and FTP volunteer recruitment.

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

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	150
Canvassing in Non-Targeted Zip Codes	
New Individuals Who Received Text Messages	2712
Phone Calls	140
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	12-Fresno
Reporting Period	January 1, 2019 - January 31, 2019

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

Total Expenses for thei period: \$ 14,594.03

Staff Salaries :\$ 4874.93

CEO Personnel: \$59.67hr x 10hrs= \$596.70

Program Director: \$ 32.47hr x 58hrs= \$1883.26

VTA PProgram Manager: \$25.57 x 47hrs = \$1201.79

Outreach and Education Coordinator: \$20.92hr x 57hrs= \$1192.44

Service Fee for Tablets (Dec) : \$115.04

Subcontractor Fee Interface: \$9604.80 (211 Hotline Phone service)

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

Outreach Coordnator and Program Manager attended events and handed out Cal EITC flyers to families/students who attended. Verbally shared recent changes to eligibility for tax credit and answered question asked by families/students.

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:

We've reached the following number of people, via text, from last year's icarol reporting that had tax prep resources sent:

English 2562

Spanish 250

Total 2712

Messaging sent:

The text messages that we sent to previous 211 callers was with the following message:

United Way Fresno & Madera Counties would like to assist you this tax season.

To reserve, reschedule, or cancel a free tax prep appointment visit <http://bit.ly/freetaxfresno>

United Way de los condados Fresno y Madera desean ayudarlo en esta temporada de impuestos.

Para reservar, cambiar, o cancelar una cita de impuestos, visite <http://bit.ly/impuestosgratisFresno>

5) Provide broad overview of Phone Calls conducted:

Office staff called last years tax clients that only had landlines listed to inform them of this years changes in CalEITC qualifications and our upcoming Free Prep Tax locations and appointment systems.

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: Community partners were contacted to help distribute Cal EITC information. They were also contacted to obtain information about up coming events for January and future months. Aslo contacted

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				

Target Area	12-Fresno			
Reporting Period	January 1, 2019 - January 31, 2019			
Paid Radio Ads				
Public Services Announcements (Radio)	1	5,560		
Paid Television Ads				
Public Services Announcements (T.V.)	1	14,297	4	62,000
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:

Total Expenses for thei period: \$523.68

Staff Salaries :\$ 238.68

CEO Personnel: \$59.67hr x 4hrs= \$238.68

Subcontractor Fee JP Marketing: \$285.00

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: CEO and VITA Program manager did participate in 4 news spots, 1 with Great Day and 3 with Univision, I was not able to get the number of reach from the station staff before the report deadline. I will update this data on our Febuary report.

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	January 1, 2019 - January 31, 2019

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	4,415
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:
Staff Salaries: \$1051.26
 Material Distribution Salaries: \$12.12hr x 32 hrs = \$ 387.84
 Coordination of Distribution Salaries \$18.07hr x 30 hrs- \$542.10
 Milage for distribution: \$121.32

2) Provide a broad overview of flyer/brochure and poster distribution:
Provided flyers to community events, community partners and local nonprofit organizatios in the area. Flyer contained information in regards to Cal EITC eligibilty for tax credits.

3) Provide a listing and narrative of direct mailers that went out:
No direct mailers went out this reporting period.

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

Group Events

Total Number of Events Held During the Reporting Period			8	
Location	Zip Code	Date	Attendance	Press at Event?
School	93702	01/02/19	30	No
Community Gathering	93638	01/24/19	100	No

Target Area	12-Fresno			
Reporting Period	January 1, 2019 - January 31, 2019			
Community Gathering	93711	01/26/19	30	No
Resource Fair	93741	01/29/19	20	No
School	93702	01/30/19	20	No
Community Gathering	93726	01/30/19	30	No
Resource Fair	93721	01/22/19	60	No

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
No costs for events in this period.
- 2) Provide a brief overview of events conducted during the reporting period:
Events were community gathering, resource fairs and schools. Cal EITC flyer were passed out to families and students eligibility for tax credit.
- 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

Other

Category	Actual (#)
Grantee Meetings	3
Partner Meetings	10
Administrative/ Reporting	4

Narrative of Expenditures in EARS and Outreach Activities

Administrative Costs for Dec: \$ 3,044.16

- Grantee Required Staff Meetings for Jan : \$469.00
- Program related meetings with Partners and Subcontractors for Jan: \$ 1257.83
- Administrative/ Reporting with Program Staff for Dec: \$1317.33

Target Area	12-Fresno
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

NO challenges this month alot of great communication with campaign and community partners.

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:

Target Area	12-Fresno
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

Web

Category	Metrics
EITC Website Hits	84

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 \$ 378.25 includes Staffing, Computer Supplies, & outreach costs.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
CAPK: Developing the Kern CalEITC webpage that will go live in February with links to CalEITC4me. Purchased URL KernCALEITC.org. The web page will also be accessible through CAPK's Home Page and the link shared through social media.

CSET Developed a dedicated CalEITC webpage available at www.cset.org/caleitc. The webpage is also linked on CSET's VITA program webpage at www.cset.org/vita. The webpage went live in December 2018.

- 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

Social Media

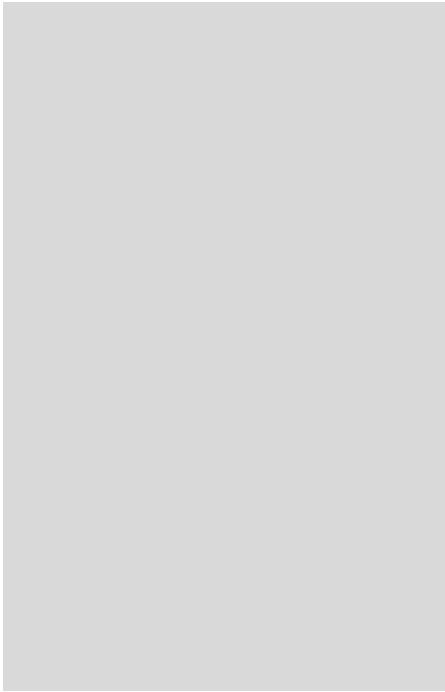
Number of Facebook Posts	14	Number of Tweets	2
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	

Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019

CAPK: The Kern VITA Partnership along with the help of Councilmember Andrae Gonzales, United Way of Kern County's Executive Director Mari Pérez-Dowling, Self-Help Federal Credit Union's Jose Gonzalez and representatives from the Board of Supervisors, Congressman Kevin McCarthy, Senator Melissa Hurtado, and TJ Cox for Congress gathered to help raise awareness of the Earned Income Tax Credit (EITC.) This credit gives a financial boost to the people who need it most.

For more information on this tax credit, the United Way will be hosting an EITC Awareness event this evening, Friday 1/25 from 3 – 6 pm at the Mercado Latino (2105 Edison Hwy).

CSET: #caleitc is a cash back refund that could increase your tax return. You must file your taxes to claim it and CSET can help you file them for FREE! Visit www.cset.org/caleitc to learn how to qualify for this credit!



Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019

EITC messaging as well as CALEITC, resulting in over 3,000 impressions!
 CAPK's Outreach Team met with VITA Cal EITC staff to plan/schedule further social media posts.
CSET: Posted 2 Facebook, 2 Twitter, and 2 Instagram, for a total of 6 posts. All posts included links to CSET's CalEITC webpage. On January 25th a post was published on all social media handles for National EITC Awareness Day. The post made reference to both state and federal EITC. These effective posts are reaching broad audiences in Tulare County, with 1,203 people reached through the two Facebook posts alone.

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:
 CAPK leverages social media through our established and growing followers:
 Facebook 2,725; Instagram 535; and Twitter 675.

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	676
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: \$2,609.82 for staffing and mileage.
- 2) Provide broad overview of canvassing for targeted zip codes:
CAPK had 323 contacts in the targeted zip codes of 93304, 93306, 93307, 93308, and 93309.

CSET had 262 face to face canvassing took place at the following zip codes:
 93277, 93291
 104 face to face canvassing took place at the following zip codes:
 93247, 93257
- 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:
CSET sent the Alert TC message to the Tulare County Health & Human Services Agency (HHSA). We are in the process of confirming dates of release. Information about VITA/ CalEITC sites, locations, and hours of operation were also submitted to the United Way of Tulare County 211 telephone services

Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019
<p>operation were also submitted to the United way or Tulare County 211 telephone services.</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>	

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	4	9,499		

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$285.39 for staff 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:

CAPK: As part of the overall social media plan, we used Facebook and Twitter to promote CalEITC and National EITC Awareness day with a total of 4,363 impressions.

CSET is using three social media platforms for our marketing campaign. The ad campaign began running in January. Impressions include: 5,008 impressions through Facebook and Instagram and 128 impressions through Twitter, for a total of 5,136 impressions for January across Tulare County.

Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019

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: **CAPK:** KGET TV-17, KERO TV- 23, KBAK TV-29 and KUZZ Radio all attended the CAL EITC Awareness event at 300 19th Street in Bakersfield on Jan. 25.

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	3,152
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: \$2,885.79 for staff costs.

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

CAPK conducted outreach and distributed 2,539 brochures at the following:

- Partners /Community outreach at Bakersfield College, CAPK Food Bank, CAPK WIC Sites, Churches, and the Salvation Army. All brochures were given out in stacks of 25 to ensure tracking.
- Kern County Fairgrounds Swap Meet: interacted and provided information to over 500 people.
- Valley Plaza Mall weekly outreach to provide CalEITC education and VITA referrals.
- Targeted Zip codes **94404, 93306, 93307, 93308** and **93309**.

CSET Distribution of flyers were at the following targeted zip codes:

- 93247,1 flyer, reaching 100 individuals
- 93257,103 flyers, reaching 1250 individuals
- 93277,72 flyers, reaching 600 individuals
- 93291,190 flyers, reaching 4800 individuals

Distribution of flyers were at the following non-targeted zip codes:

- 93219, 6 flyers, reaching 300 individuals
- 93221,2 flyers, reaching 100 individuals
- 93223,161 flyers, reaching 600 individuals
- 93235,2 flyers, reaching 600 individuals
- 93256,6 flyers, reaching 300 individuals
- 93267,1 flyer, reaching 200 individuals

Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019

93270,1 flyer, reaching 200 individuals
93274,64 flyers, reaching 4200 individuals
93286,4 flyers, reaching 300 individuals

3) Provide a listing and narrative of direct mailers that went out:
CSET designed and finalized the EDDM postcard in January and will be ready to mail by next month

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

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
School	93308	01/16/19	16	No
Resource Fair	93305	01/25/19	200	No
Free Tax Prep	93301	01/25/19	40	Yes
Educational Forum	93291	01/05/19	79	No
Educational Forum	93291	01/12/19	78	No
Educational Forum	93291	01/19/19	54	No
Educational Forum	93291	01/26/19	69	No
Educational Forum	93257	01/05/19	31	No
Educational Forum	93257	01/12/19	30	No
Educational Forum	93257	01/19/19	28	No
Educational Forum	93257	01/26/19	30	No
Educational Forum	93291	01/25/19	20	No
Educational Forum	93291	01/30/19	15	No
Educational Forum	93257	01/30/19	9	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$843.14 for staff and EITC

Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019
<p>1) List the various activity expenditures charging for this month and their costs. \$152 for staff and EITC Awareness event supplies.</p> <p>2) Provide a brief overview of events conducted during the reporting period: CAPK visited the Oildale Head Start Center to participate in their parent meeting to educate parents about CALEITC. CAPK VITA CalEITC has a booth at the Kern VITA Partnership National EITC Awareness and Resource Fair celebration at the Bakersfield Mercado Latino.</p> <p>On January 25th CAPK Held their annual EITC Awareness Day event at our CAPK VITA office in down town Bakersfield. The event was well attended by community partners, local and State government representatives, and the media (listed below). Government Representatives included Bakersfield City Councilman Andrae Gonzales and representatives from the offices of House Republican Leader Kevin McCarthy, Congressman T.J. Cox, State Senator Melissa Hurtado and the Kern County Board of Supervisors .</p> <p>CSET presented information about CalEITC during VITA trainings in Visalia (93291) and Porterville (93257).</p> <p>3) If members of the press attended an event, indicate which press outlets: CAPK: KGET TV-17, KERO TV- 23, KBAK TV-29 and KUZZ Radio all attended the CAL EITC Awareness event at 300 19th Street in Bakersfield on Jan. 25.</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources:</p>	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<div style="border: 1px solid black; padding: 5px; min-height: 30px;">Type Text here</div>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<div style="border: 1px solid black; padding: 5px; min-height: 30px;">Nothing to Report</div>	
Narrative of Success Stories	
<div style="border: 1px solid black; padding: 5px; min-height: 30px;">Success Story #1</div>	

Target Area	10-Kern/Tulare
Reporting Period	January 1, 2019 - January 31, 2019
<p>Success Story #1</p> <p>CAPK Date of Success Story: 01/28/2019 Name of Person from Success Story: Marcus (no last name given) Zip-Code Where Person Lives: 93304 VITA Site where person got taxes done (if applicable): n/a Narrative: Marcus had used VITA last year and said he had received a refund of about \$837. He had been informed by his tax preparer that he qualified for the state earned income credit and it had bumped his refund by about \$326.</p> <p>Success Story #2 Date of Success Story: 01/29/2019 Name of Person from Success Story: Tyler Blair Zip-Code Where Person Lives: 93309 VITA Site where person got taxes done (if applicable): 300 19th St. Narrative: Tyler got his taxes done on Jan. 29th and got a base refund of \$529. When asked if he had qualified for the state EITC, he said yes and that he had received \$124 extra.</p> <p>CSET</p> <p>Success Story #1 Date of Success Story: 1/17/2019 Name of Person from Success Story: EMPLOYMENT CONNECTION Zip-Code Where Person Lives: TULARE COUNTY Narrative: OUTREACH TO EMPLOYMENT CONNECTION - REACHED CLIENTS WHO DO NOT HAVE FILING REQUIREMENTS AND ARE LOW INCOME</p> <p>Success Story #2 Date of Success Story:1/17/2019 Name of Person from Success Story: PROTEUS Zip-Code Where Person Lives: TULARE COUNTY Narrative: COLLABORATION WAS DONE WITH PROTEUS, INC, A NON-PROFIT ORGANIZATION THAT WORKS WITH FARM LABOR WORKERS.</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-8011
Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

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:

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:

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.)		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:

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

Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

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:

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	715
Phone Calls	
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

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

Texting costs: \$21,000
Texting Management: \$750 (\$75/H - 10 hours)
Field Coordinator: \$4,285
Field Organizer: \$2,000
Canvassing Total: \$28,035.00

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

Although no interactions and canvassing was done in Targeted zip codes. The month of January was spent conducting interviews and bringing on board a new Field organizer to help canvass San Bernardino County, build relationships, and help support events that are hosted by CalEITC4Me and partner organizations.

Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

build relationships, and help support events that are hosted by CalEITC and partner organizations.

Expenses also include time to train new organizer on texting software, and Cal EITC eligibility information.

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:

The texting program began slowly in January, with **715 texts**, most through follow-ups to sign-ups on website or texting membership lists from partner organizations. The reason the expense is so high is that GSO has pre-paid Relay (Texting Software) to drive down costs. Relay base price is \$.08 per text, the prepayment allows us to have a price of \$.06 per text.

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:

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

Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

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

Social Media Ads: \$652.50 (Signified Media Group retainer to create digital plan)

Press Coordination: \$2,500 (Taken Out)

Total Media: \$652.50

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 Ads have began running in January, Ads likely to run at the end of February or early march. This strategy is used because the beginning of Tax season does not need as much marketing to get people to file their taxes. Waiting until later in the tax season to begin Ads allows us to reach the people who have not filed yet and may need assistance.

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:

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

Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

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

No Expenses to report at this time

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

Event flyers to be printed and distributed in February.

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

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

Group Events

Total Number of Events Held During the Reporting Period

Location	Zip Code	Date	Attendance	Press at Event?
----------	----------	------	------------	-----------------

Target Area	9-San Bernardino			
Reporting Period	January 1, 2019 - January 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
- Event Management: \$2,500
- 2) Provide a brief overview of events conducted during the reporting period:
- Although no events were held in January. Even management costs include planning and finalizing all logistics for events to come in February. Finding a taco vendor, renting necessary equipment. GSO has utilized funding to hire an event manager for the remaining months of Tax season.
- Events in February:
- February 2nd - VITA event with SB Transitional Assistance Department (TAD)
February 22 - Youth VITA event at San Bernardino Valley College
March 23 - VITA Bus event in Hesperia
- 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	January 1, 2019 - January 31, 2019

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Other	
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Sub-Grantees awarded first payment in December, they will receive the second installment in March.

Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

No Challenges to report at this time.

Narrative of Success Stories

No Success stories to report at this time.

Target Area	9-San Bernardino
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	1,549

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Web costs for January were \$303.14 and include the following:
- \$242.50 for UWBA staff salary and rent
 - \$40.80 for UWWC staff costs
 - \$19.83 in administrative costs at UWBA
- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 The total EITC website hits include the visitors to the UWBA, UWWC, and CAP Sonoma websites which all have information about the Cal EITC. The total visitors were 1,549, including 910 from CAP Sonoma and 393 from UWWC, with the rest estimated to be from Contra Costa County. Along with the Cal EITC information, we also all provided information on finding free tax sites and other resources.
- 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	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	27	Number of Tweets	25
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Join the nearly 1,500,000 Californians who claimed over \$346,000,000 in California's Earned Income Tax Credit last year! For example, 42,269 Kern County workers claimed \$13,284,958 in #CalEITC last year, could you join them this year? #money #IRS #California #Taxes #TaxCredits		Young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now. http://bit.ly/2BTixq8	
Number of Other Posts (Instagram, etc.)	7	Exact Messaging of Most-Liked "Other" Post	
		#Volunteers needed this tax season. Learn more here: https://lnkd.in/g-CSQgJ	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
The costs for social media were \$928.71 total and include the following:

- \$250.41 for UWBA staff salaries and rent
- \$289.75 for CAP Sonoma staff
- \$27.80 for UWWC staff
- \$300 for boosted ads paid for by CAP Sonoma
- \$60.76 for UWBA administrative costs

As most of our non-paid social media has no cost to post, the costs in this category continue to be allocated for staff resources to create and share posts.

2) Provide a narrative of education and outreach activities conducted during the month under social media: The posts listed above combine the posts by UWBA, UWWC, and CAP Sonoma. UWBA posted 17 Facebook posts, while CAP Sonoma and UWWC posted 5 each. Along with creating unique content, we also all pull from content created by UWCA to promote a consistent message statewide. We continue to find that the social media platforms, and especially Facebook, are good places to have a dialogue with the public and

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019

to answer questions by direct message.

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:

The most liked Facebook post from UWWC was: "We need more volunteers! Come meet new people, make friends and join others across the state as we prepare taxes for free to help workers claim the #CalEITC, a cash-back refund that helps put more \$ in the pockets of those who need it during tax time.

<http://bit.ly/20TomrP>" and their most liked Tweet was "Get involved! #CalEITC is a tax-time cash-back refund for workers. You could help your community get the money that it deserves! Volunteer today.

<https://t.co/tvRfK9VanC> <https://t.co/UAutoJ7MTQ>."

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 has not yet begun canvassing in Contra Costa County but spent staff time dedicated to planning with Community Connect Labs and Golden State Opportunity Fund. The total cost was \$192.60, including \$180.00 in staff time and \$12.60 in administrative costs. UWWC and CAP Sonoma did not incur canvassing costs in January.

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: N/A

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019

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

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	2		2	
Paid Radio Ads	112		84	
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements	10		10	
Internet/Website Ads	4		4	
Social Media Promoted/Boosted Ads	4	39,461	4	6,094

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Total media costs for Contra Costa and Sonoma counties were \$16,979.54 and are broken down as follows:

- \$738.23 for UWBA staff costs and rent
- \$4,644.00 for UWBA Bart ads
- \$296.47 for UWBA Facebook ads
- \$775.00 for CAP Sonoma staff
- \$1,999.00 for CAP Sonoma print ads in La Prese
- \$491.80 for UWWC staff
- \$3,250.00 for UWWC transit advertising
- \$3,100.00 for UWWC radio ads
- \$1,110.81 in UWBA administrative costs

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019

\$1,116.61 in UWBA administrative costs

Costs continue to be allocated for staff salaries and costs, as well as for ad buys on radio, transit (both Bart and on Sonoma County buses), and Facebook.

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:

UWWC and CAP Sonoma are still tallying impressions for their radio, transit, and internet ads. Along with those paid opportunities, we have combined the total reach of UWWC and UWBA paid ads. The total reach in English was 17,635 and together we created four ads in English and four in Spanish. UWBA also posted ads in Chinese and Vietnamese, which were served 3,268 times and made 6,164 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:
 Suzanne Harris was interviewed over the phone by Ted Williams of Sonoma Media Group regarding the EKS program and the expansion of the Cal EITC credit. The ad paid for by CAP Sonoma is in La Prensa and is online here: <http://santarosapressdemocrat.ca.newsmemory.com/?special=La+Prensa> (scroll to page 5)

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	21,000
Number of New Individuals who Received Direct Mailers	29,085

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 collateral messaging was \$11,553.39 and is broken down as follows:

- \$9,984.87 for UWWC direct mail costs
- \$182.45 for UWBA staff costs and rent
- \$630.25 for UWBA printed material costs, including the ordering of additional postcards

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019

- \$755.83 in UWBA administrative costs

2) Provide a broad overview of flyer/brochure and poster distribution:
 UWBA distributed about 1,000 client postcards in Contra Costa county at our event, and UWWC distributed more than 20,000 through their partners including the County of Sonoma.

3) Provide a listing and narrative of direct mailers that went out:
 UWWC also sent a direct mail post cards to more than 29,000 Sonoma families and individuals encouraging them to file for free and claim the EITC.

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

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	95407	01/07/19	250	Yes

Target Area	8-Contra Costa/Sonoma			
Reporting Period	January 1, 2019 - January 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

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

Total costs for Group Events were \$1,042.63 and include the following:

- \$594.06 for UWBA staff costs and rent
- \$283.60 for UWWC staff
- \$96.76 for UWWC printed material for their event
- \$68.21 for admin costs for UWBA

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

Financial Stability Officer, Suzanne Harris, spoke at the Sonoma County Alliance Meeting in January that United Way sponsored. Almost 250 business leaders from various sectors were in the room when she explained the EKS program and the value of the CalEITC credit to low income families.

UWBA continued to dedicate staff time to planning future events in Contra Costa county, including one that occurred in early February.

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

Sonoma Press writer from North Bay Business Journal covered the event and sat at the United Way table from Sonoma Media Investments, NorthBay Biz.

Other

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Having the government shut down and having our SPEC team furloughed definitely lent for a challenging January. UWBA staff and our partners had to troubleshoot many basic issues on our own which left less time for outreach and education. We also have heard from clients that the shutdown made them uneasy about tax time which we have tried to alleviate in materials and communication.

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:

Target Area	8-Contra Costa/Sonoma
Reporting Period	January 1, 2019 - January 31, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

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	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	26418

Narrative of Expenditures in EARS and Outreach Activities

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

Web Updates (**\$320**)

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

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

OCUW Tax related pages **2,264** 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) **24,154** 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 began in January and has increased the number of website hits considerably.

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	25	Number of Tweets	11
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Start the new year off right by saving! Learn how you can put more money in your pocket by filing your taxes for free and claiming credits like the Earned Income Tax Credit: https://bit.ocuw.org/2E1IMxK		Start the new year off right by saving! Learn how you can put more money in your pocket by filing your taxes for free and claiming credits like the Earned Income Tax Credit: https://bit.ocuw.org/2AMQskc #OCFreeTaxPrep #EITC	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
43		Start the new year off right by saving! Learn how you can put more money in your pocket by filing your taxes for free and claiming credits like the Earned Income Tax Credit (link in bio). #OCFreeTaxPrep #EITC#CalEITC	

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 (19 FB) (7 Tweets) (29 Instagram)
CHIOC (4 FB)
SOS (2 FB) (4 Tweets) (1 Instagram)
CAPOC (13 Instagram)

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 throughout Orange County.

CHIOC

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019
<p>All approved content was posted across CHIOC's Facebook in January - 1 post per week. In total, 418 people were reached across 4 different posts. The most successful post was around volunteers. "Our partner United Way needs more volunteers! Come meet new people, make friends and join others across the state as we prepare taxes for free to help workers claim the #CalEITC, a cash-back refund that helps put more \$ in the pockets of those who need it during tax time. UnitedWayOC.org/VITA" This post reached 130 people and had 6 engagements.</p>	

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	236
Canvassing in Non-Targeted Zip Codes	48
New Individuals Who Received Text Messages	31317
Phone Calls	
Office Visits	540

Narrative of Expenditures in EARS and Outreach Activities

- 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 **(\$8,500)**
Texting Campaign with 211 OC **(\$2000)**. For a **Total \$10,500**

- 2) Provide broad overview of canvassing for targeted zip codes:
CAPOC Canvassed the target zip code 92683 Westminster and 92804 Anaheim passing out CalEITC and Free Tax Prep information. The addresses were collected for data to be sent to FTB. **236 Interactions**

- 3) Provide a broad overview of canvassing for non-targeted zip codes:
CAPOC Canvassed zip code 92869 Orange passing out CalEITC and Free Tax Prep information. The addresses were collected for data to be sent to FTB. **48 Interactions**

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019
<p>addresses were collected for data to be sent to FTB. 48 interactions</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent:</p> <p>OCUW employed 211 OC to facilitate texting campaign for OC Free Tax Prep 2019 tax season. Their client list serves the low income community. See <i>attached report for January</i>. 3rd and final text to be sent in March as a final reminder. 31,317 successful text messages (19,147 Eng/12,170 Span)</p> <p>5) Provide broad overview of Phone Calls conducted: NA</p> <p>5 b) Provide broad overview of Office Visits conducted: See Narrative in OTHER</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: See Narrative in OTHER</p>	

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	3	64,145		
Paid Radio Ads			40	2,254
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements	70	272,007	70	272,007
Internet/Website Ads	9	144,277		
Social Media Promoted/Boosted Ads	10	363,426		

Narrative of Expenditures in EARS and Outreach Activities

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

Digital Ad Spend- management fees, reporting, analysis **(\$2,500)** Digital Ad Spend- ad purchase **(\$20,697.14)** Radio La Ranchera Jan **(\$1,620.00)** Transportation Advertising-bus wraps Jan **(\$2,015)** For a **total \$26,832.14**

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:

With the assistance of Jessica from CSD, we came up with the following impressions;

Spanish Radio
220 Spots between 1/28-2/18.
We have 40 spots in January and the rest will be in February.
La Ranchera proposed reach for 220 spots is 496,000

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019
<p>La Ranchera proposed reach for 220 spots is 496,000. Recommend 496,000 \div 220 = 2254 for January impressions. Bus Ads Exterior and Interior cards 1/2 English/Spanish 8 weeks 1/21-3/17 4 Weeks exterior impressions 5,477,600 +4 weeks interior impressions 493,200=5970800 1 week = 1,492,700 divided by 3 reporting periods= 497,666 impressions Jan 1/2 Eng/Spain 248,783 Mobile ads connected to the bus ads 46,449 (1/2 Eng/Spain) 23,224 in January Digital Ad Campaign The digital ad strategy was to push paid ads heavy in January to reach the target demographic before they went to paid tax preparers and before the competition was in full swing. The campaign is scheduled to continua through April 15. Reporting Impressions: Google 1,298,501 \div 9 = 144,277, Facebook 3,634,264 \div 10 = 363,426 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: 1/17/19 Daily Pilot 418,500 views per month (13,500 Impressions/day) 1/17-23/19 San Clemente Times 20,000 circulation (645 Impressions per day) 1/2/2019 Santa Ana City News mailed to 50,000 households 4) Indicate any leveraging of other resources conducted this month in regards to media: OCUW digital manager secured 3,571 impressions through Google grant ads. As a non-profit we are eligible to receive.</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	19,610
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 (\$237.05), Printing (\$8555.44), Translation 4 languages (\$1,660), Cat & Mouse (\$6000) TOTAL \$16,452.49</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p>

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019

OCUW updated, translated into 4 languages and printed over 49,000 pieces of collateral. Due to timing challenges over the holidays between translation and printing, the order had to be done in separate batches which increased the price of the original quote. Plus, we realized shortly after arrival we needed to print an additional 10K due to community demand. January is one of the largest pushes for distribution of materials. Not only does the translation company translate the flyers, but re-designs the files due to reformatting. **See attached Collateral Messaging continued.**

OCUW

1,004 Community Flyers and **573** CalEITC brochures English and Spanish distributed during 5 CalEITC/Free Tax Prep (FTP) Educational Forum/Presentations; 5 Resource Fairs; 2 Food Banks and 1 Community Gathering. **10,923** pieces distributed to potential tax prep clients through local partners, **2,544** distributed by OCUW staff during community outreach and 1:1 Covered California sessions.

CHIOC

2,480 Flyers and **1450** CalEITC Brochures. CHIOC Certified Enrollment Counselors take flyers and brochures to clients at various enrollment sites they provide services at. Those include : Santa Ana Healthcare Agency, Boys and Girls Club S.A. , Santa Ana WIC -Main Kid Works, Corbin Family Resource Center and Costa Mesa Hope Clinic. Posters were taken to Santa Ana HCA-Behavioral Health Services, Lake Forest FRC and one large stand up banner at their CHIOC office.

SOS

While clients waited for their medical appointment **87** flyers were distributed to clients within target zip code and non-target zip code at the SOS Community Health Center medical clinic. Clients that received a bag of groceries from the SOS Food Pantry were provided with a flyer inside their bag or at the front desk counter when they filled out a registration slip-**265**.

CAPOC

284 flyers distributed through canvassing.

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:

See attached: Collateral Messaging Narrative Continued for more references to #4.

Group Events

Total Number of Events Held During the Reporting Period			30	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	92675	01/08/19	5	No
Community Gathering	92701	01/09/19	22	No
Resource Fair	92663	01/09/19	70	No
Resource Fair	92705	01/11/19	200	No
Educational Forum	92614	01/15/19	65	No

Target Area	7-Orange			
Reporting Period	January 1, 2019 - January 31, 2019			
Educational Forum	92705	01/16/19	11	No
Resource Fair	92705	01/18/19	200	No
Educational Forum	92705	01/22/19	12	No
Educational Forum	92705	01/22/19	9	No
Resource Fair	92663	01/23/19	100	No
Educational Forum	92653	01/23/19	13	No
Educational Forum	92701	01/24/19	15	No
Food Bank	92630	01/24/19	134	No
Resource Fair	92705	01/25/19	100	No
Food Bank	92801	01/26/19	100	No
Educational Forum	92706	01/16/19	9	No
Educational Forum	92801	01/17/19	36	No
Educational Forum	92704	01/23/19	8	No
Educational Forum	92801	01/24/19	22	No
Library	92630	01/24/19	25	No
Educational Forum	92704	01/25/19	12	No
Educational Forum	92801	01/26/19	50	No
Resource Fair	92688	01/29/19	25	No
Educational Forum	92688	01/31/19	14	No
Food Bank	92627	01/07/19	25	No
Health Care Clinic	92627	01/10/19	45	No
Health Care Clinic	92627	01/17/19	42	No
Food Bank	92627	01/17/19	25	No
Food Bank	92627	01/30/19	100	No
Food Bank	92627	01/31/19	115	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activities, expenditures, charges for this month and their cost.

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019

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

Partner Training (**\$500**) CalEITC Education and Outreach Coordinator (**\$4,573.18**) OC Free Tax Prep Project Coordinator (**\$1804**) For a **total \$6,877.18**

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

OCUW

1/8 Educational Forum CalEITC Education and Outreach Coordinator did a Spanish presentation about CalEITC and Free Tax Prep (FTP) to a group of CHEC Family Resource Center volunteers in San Juan Capistrano. This group of **5** volunteers share resources available at the FRC.

1/9 Community Gathering Shared information about CalEITC and FTP to a networking group of community members facilitated by Templo Calvario Church in Santa Ana, **22** Community Representatives (English speakers) attended.

1/9 and 1/23 Resource Fair Hosted a table at the Melinda Hoag Smith Center. Overall attendance was **170** with about **31** participants stopped at the booth and received CalEITC brochures English and Spanish . We also promoted free tax prep services that will be held at that location . The center serves low-income individuals and families in the area of Costa Mesa.

1/11, 18, 25 Resource Fair Hosted a table at the Santa Ana Mexican Consulate. Overall attendance was **600** with about **64** participants stopping at the booth and receiving CalEITC brochures. We were also promoting free tax prep services that will be held at that location. The center serves many individuals and families. Mostly Spanish speakers.

1/15 Educational Forum Hosted all partner gathering at OCUW offices to prep site coordinators and key volunteers for coming season. Distributed all collateral, banners, posters, signs in addition to presenting information on overall OC Free Tax Prep, IRS and tax slayer. Provided key deliverables through USB flash drives.

1/16 Educational Forum Participated at the Minnie Street Family Resource Center - Service Provider's Round Table (in English) in the city of Santa Ana, **11** different service providers received information. Resource Center in Lake Forest; only limited number of participants could receive the information in a workshop prior to food bank (per FRC guide-lines), the rest of participants received flyers.

See additional copy for narrative continuation.

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

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Canvassing Continued

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019

5 b) Provide broad overview of Office Visits conducted:

SOS 129

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.

CHIOC 411

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 92701 and surrounding city of Costa Mesa.

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.

OCUW is partnering with 3 sub-grantees for specific CalEITC canvassing, education and outreach activities in the following target zip codes:

Community Health Initiative of Orange County (CHIOC) \$3000

92701 and the surrounding City of Santa Ana including phone calls and office visits
 In the month of January CHIOC CalEITC coordinators posted social media, sent CalEITC/Free Tax Prep Email to 187 local partners, enrollment counselors conducted 1:1 office visits, and conducted outreach through group events.

Community Action Partnership of Orange County (CAPOC) \$2500

92683, 92804 and the surrounding cities of Westminster and Anaheim
 In the month of January, CAPOC Director overseeing CalEITC, recruited and hired EITC outreach coordinator. They were able to train new outreach coordinator, post on social media, canvass in targeted and non-targeted zip codes.

Share Our Selves (SOS) \$3000

92627 and the surrounding city of Costa Mesa
 In the month of January, CalEITC coordinator posted social media, distributed collateral through group food bank and health care clinic events. SOS 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	January 1, 2019 - January 31, 2019

Now that tax season has begun there will be more opportunities to collect success stories.

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:

Target Area	7-Orange
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

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:

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:

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:

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

Target Area	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

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:

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	1,000
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 costs: \$21,000
 Texting Management: \$1,275 (\$75/H - 17 hours)
 Field Coordinator: \$4,285
 Field Organizer: \$2,000
Canvassing Total: \$28,535.00

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

Although no interactions and canvassing was done in Targeted zip codes. The month of January was spent conducting interviews and bringing on board a new Field organizer to help canvass Riverside County, build relationships, and help support events that are hosted by CalEITC4Me and partner

Target Area	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

organizations.

Expenses also include time to train new organizer on texting software, and Cal EITC eligibility information.

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:

The texting program began slowly in January, with **1,000 texts**, most through follow-ups to sign-ups on website or texting membership lists from partner organizations. The reason the expense is so high is that GSO has pre-paid Relay (Texting Software) to drive down costs. Relay base price is \$.08 per text, the prepayment allows us to have a price of \$.06 per text.

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:

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

Target Area	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

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

Social Media Ads: \$1,024.50 (Signified Media Group retainer to create digital plan)
 Ethnic Media: \$9,000
Total Media: 10,024.50

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 Ads have began running in January, Ads likely to run at the end of February or early march. This strategy is used because the beginning of Tax season does not need as much marketing to get people to file their taxes. Waiting until later in the tax season to begin Ads allows us to reach the people who have not filed yet and may need assistance.

Ads to be directed at same population of potentially eligible filers that recieve a piece of direct mail and a text message.

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:

Expenses for Ethnic Media are the upfront payments for Penny Empire (PE) to provide media placement and content creation services for the CalEITC4Me California Campaign.

Funding to be used to place CalEITC4Me Ads in Black Voice News in Riverside.

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

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

Target Area	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

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

Event Flyers \$775.26

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

1,500 Tacos and Taxes flyers printed and to be distributed for upcoming events in February.

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

Direct Mailers set to go out in Middle of February. Direct mail done in coordination with the Franchise Tax Board.

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

Group Events

Total Number of Events Held During the Reporting Period	0
---------------------------------------------------------	---

Location	Zip Code	Date	Attendance	Press at Event?
----------	----------	------	------------	-----------------

Target Area	6-Riverside			
Reporting Period	January 1, 2019 - January 31, 2019			
Community Gathering				

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Event Management: \$2,500 (GSO has brought on event manager to support events in Feb-June)

- 2) Provide a brief overview of events conducted during the reporting period:
 Although no events were held in Riverside during the reporting period. Event management includes finalizing logistics for the events to come in February. Tacos and Taxes events.
 February 2nd - VITA event with College of the Desert
 February 28 - VITA event in the Palm Desert
 March 23 - VITA event in Indo

- 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	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

--

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

<p>Type Text here</p>

Target Area	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

One challenge was VITA sites awaiting the Federal government shutdown to end

Narrative of Success Stories

No Success Stories to report at this time.

Target Area	6-Riverside
Reporting Period	January 1, 2019 - January 31, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way California Capital Region
Grantee Representative	
Telephone Number	
Email Address	
Contract Number	
Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	1,138

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 All web traffic has been from organic traffic and no additional expenditures were required for this activity.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 YourFreeTaxMoney.org website was included in the Call To Action on CalETIC collateral distributed at community sites and tabling events.

- 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	
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	3	Number of Tweets	2
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Thanks to all who came out for our #ireetaxprep kick off at Grant High. Our IRS trained professionals can help you save money and file your taxes for FREE.		Ria came to us in 2017 to file her taxes for the first time alone and found that she qualified to receive a federal & state refund of over \$7,000 plus EITC refund of \$1,700. She was ecstatic! With the extra money, she paid off debt and put the	
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:
All activity was from organic social content and no additional expenditures were required for this activity.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
UWCCR participated in the Financial Stability #UnitedWayChat on twitter on 1/19/19. We also promoted the kick off of our Free Tax Prep sites,

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	
Reporting Period	January 1, 2019 - January 31, 2019

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1668
Canvassing in Non-Targeted Zip Codes	6265
New Individuals Who Received Text Messages	29
Phone Calls	6
Office Visits	339

Narrative of Expenditures in EARS and Outreach Activities

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

Asian Resources Institute \$1,258
Community Link \$2,381.66
International Rescue Center \$1,742.89
La Familia \$3351.25
Mutual Assistance Network \$916.76

UWCCR Staff Time \$341.83

Indirect (11% of category total): \$1099.16

Total \$11,091.55

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

- 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.
- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
See attached word document.
- 5) Provide broad overview of Phone Calls conducted:
See attached word document.
- 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)

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:
There was no paid media activity for this period. Additional expenditures were the result of UWCCR staff time spent on this activity and professional fees.
Professional fees: \$375.00
UWCCR Staff time: \$849.82

11% Indirect: \$134.73

Total: \$1359.55
- 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:

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

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:
 News releases were sent to announce Free Tax Prep Kick off event on 1.30.19.

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	91,000
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:
 The expenditures for this month were isolated to UWCCR staff time spent on this activity.

UWCCR Staff Time: \$880.19

11% Indirect: \$96.82

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Total: \$977.01

2) Provide a broad overview of flyer/brochure and poster distribution:
 CalEITC flyer - What would you do with an extra \$6,500? distributed to community partners including La Familia Counseling Center, Asian Resources Inc, Mutual Assistance Network, 2-1-1, International Rescue Committee

3) Provide a listing and narrative of direct mailers that went out:
 No direct mail activity

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

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	95820	01/04/19	140	Yes
Community Gathering	95824	01/07/19	44	No
Educational Forum	95825	01/08/19	7	No
Community Gathering	95817	01/09/19	12	No
Community Gathering	95820	01/09/19	20	No

Target Area	January 1, 2019 - January 31, 2019			
Reporting Period	January 1, 2019 - January 31, 2019			
Community Gathering	95817	01/11/19	16	No
Educational Forum	95825	01/11/19	5	No
Community Gathering	95820	01/15/19	80	No
Educational Forum	95825	01/16/19	14	No
Community Gathering	95838	01/16/19	4	No
Community Gathering	95820	01/16/19	25	No
Community Gathering	95815	01/17/19	10	No
Community Gathering	95820	01/17/19	50	No
Community Gathering	95838	01/19/19	8	No
Community Gathering	95820	01/21/19	120	No
Community Gathering	95610	01/22/19	25	No
Community Gathering	95838	01/22/19	8	No
Community Gathering	95820	01/22/19	70	No
Community Gathering	95838	01/23/19	4	No
Community Gathering	95821	01/24/19	10	No
Community Gathering	95824	01/25/19	33	No
Community Gathering	95821	01/25/19	12	No
Educational Forum	95825	01/26/19	8	No
Community Gathering	95827	01/26/19	13	No
Community Gathering	95820	01/26/19	250	No
Community Gathering	95825	01/28/19	12	No
Community Gathering	95821	01/28/19	6	No
Community Gathering	95820	01/29/19	275	No
School	95821	01/30/19	15	No
School	95821	01/30/19	20	No
School	95821	01/30/19	12	No
School	95825	01/30/19	36	No
School	95825	01/30/19	20	No
Community Gathering	95821	01/31/19	4	No
Community Gathering	95820	01/31/19	210	No

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

Asian Resources: \$1,215.00

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019
<p>Asian Resources: \$1,219.00 Community Link: \$0 IRC: \$871.44 La Familia \$1,035.05 Mutual Assistance Network: \$381.50 UWCCR Staff Time: \$347.82 11% Indirect: \$ 423.59 Total: \$4,274.40</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: See attached word document.</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: See attached word document.</p>	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

Narrative of Success Stories

Success Story #1

Target Area	
Reporting Period	January 1, 2019 - January 31, 2019
<p>Success Story #1</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p> <p>Success Story #2</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p> <p>Success Story #3</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p>	

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	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	245

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 This month, we dedicated staff time to continuing to updating our map and county flyers. The total cost was \$374.81 including \$24.52 in administrative costs and \$350.28 in staff salary and rent for staff working on our website.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 This month, we dedicated staff time to updating our map and flyers, as well as our Cal EITC information page and our volunteer and volunteer training page. We had 245 visitors to the Cal EITC info page and 4,831 visitors to the entire site. The map is an important tool for all of our communities, as it lists all of the free tax preparation sites including AARP, VITA, and Tax Aid locations.

- 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 are more than happy to promote programs in addition to VITA on our tax site finder in the hope that clients will find the right free tax site for their needs.

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	17	Number of Tweets	20
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Join the nearly 1,500,000 Californians who claimed over \$346,000,000 in California's Earned Income Tax Credit last year! For example, 42,269 Kern County workers claimed \$13,284,958 in #CalEITC last year, could you join them this year? #money #IRS #California #Taxes #TaxCredits		Young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now. http://bit.ly/2BTixq8	
Number of Other Posts (Instagram, etc.)	7	Exact Messaging of Most-Liked "Other" Post	
		#Volunteers needed this tax season. Learn more here: https://lnkd.in/g-CSQgJ	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
This month, costs for social media were \$387.02, including \$25.32 in administrative costs and \$361.70 in staff salary and rent for staff working on social media.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
This month, we continued to promote the Cal EITC to potential clients as people started to receive important tax documents like W2s in the mail. We also continued to promote messages and opportunities related to helping clients receive larger tax credits as an engagement strategy to potential volunteers. We have also found that our social media channels -- Facebook in particular -- have become good places for clients to ask us questions and learn more about our free tax prep services and get basic questions answered.

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	January 1, 2019 - January 31, 2019

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	55
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
This month, we continued to plan with our subcontractors and other partners around text messaging efforts in San Mateo and San Francisco counties. Our total costs were \$278.20, including \$260.00 for staff salaries and \$18.20 in administrative costs.
- 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 campaigns will begin in February.

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019

5) Provide broad overview of Phone Calls conducted:
 211 made 55 referrals to free tax sites in San Mateo and San Francisco counties, including 11 in San Mateo and 44 in San Francisco.

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

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	3	6,599	3	6,065

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 This month, we dedicated time to media planning, designing ads, purchasing, and placements. Media related costs for January were \$8,776.75 and are broken down as follows:

- \$428.23 in Facebook advertising in English, Spanish, Chinese, and Vietnamese
- \$6,708 in Bart ad costs (to begin in February/March)
- \$1,066.34 in staff salaries and rent
- \$574.18 in administrative costs relating 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:
 We created three Facebook ads each in Spanish and English including one carousel, one video ad, and one static picture. The total reach for the English ads was 4,211 and the total reach for Spanish ads was 760

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019
<p>state picture. The total reach for the English ads was 4,211 and the total reach for Spanish ads was 700. We also created one ad each in Chinese and Vietnamese, which we believe is important for our Chinatown population as well as Chinese and Vietnamese speakers throughout San Francisco and San Mateo counties. The total reach for those ads was 3,252 and the total impressions were 6,135.</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: N/A</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: N/A</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	3,000
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:
The total collateral messaging costs for January were \$2,032.83 and are broken down as follows:

- \$563.79 for additional orders of our client postcard in Spanish and Chinese
- \$345.37 for signage ordered specifically for our urban San Francisco sites
- \$727.15 for additional customizable tax site flyers

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019

- \$263.54 for staff salary and rent costs for staff working on design and printing
- \$132.99 for administrative costs

2) Provide a broad overview of flyer/brochure and poster distribution:
With additional outreach to new partners, we were quite successful in giving out client-facing printed materials and had to, therefore, do another run in Spanish and Chinese, with most of our Chinese postcards staying in the City of San Francisco. We also designed new signage that is suited for urban sites, including a sandwich board -- which we have found to be more effective than banners -- that provides more information about the tax credits and services.

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

Group Events

Total Number of Events Held During the Reporting Period			2	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	94065	01/25/19	25	No
Community Gathering	94133	01/28/19	45	No

Target Area	4-San Francisco/San Mateo			
Reporting Period	January 1, 2019 - January 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
This month, we dedicated staff time to planning and presenting the group events above as well as future events. The total costs for group events were \$918.15, including \$858.09 for staff costs and \$60.07 for administrative costs.

2) Provide a brief overview of events conducted during the reporting period:
This month, we hosted an educational forum for service providers in collaboration with Thrive in San Mateo county called 'Tax Time Matters.' It was a great event that gave attendees a deep dive into the benefits associated with the Federal and State EITC and also provided resources on how to get clients free tax help. We believe these events do important work of fully educating providers on how important these tax credits can be and in turn, they pass that education directly on to clients.

We also started a partnership with the Goodwill of San Francisco and are presenting a series of talks for their workforce about how to file for free and how to access the Federal and Cal EITC. This talk was well received and we look forward to doing more and in expanded languages to encompass Spanish and Chinese.

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

Other

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Having the government shut down and having our SPEC team furloughed definitely lent for a challenging January. UWBA staff and our partners had to troubleshoot many basic issues on our own which left less time for outreach and education. We also have heard from clients that the shutdown made them uneasy about tax time which we have tried to alleviate in materials and communication.

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:

Target Area	4-San Francisco/San Mateo
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

Web

Category	Metrics
EITC Website Hits	529

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 This month, we continued to dedicate staff time to updating our tax site finder which includes all area VITA, Tax Aid, and AARP sites and events. The total cost was \$807.28, including \$754.47 in staff salaries and rent, and \$52.81 in administrative costs.

2) Provide a narrative of education and outreach activities conducted during the month under web:
 Along with encouraging visits to our Cal EITC specific page via our Facebook ads, we also received 10,343 visitors to other areas of the website, including the volunteer pages and tax site finder. The website is the primary tool for finding information for our sites, volunteers, and clients.

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 are really happy to promote AARP sites in Santa Clara County for the first time on our site! We have consistently provided information on all free tax preparation services in the Bay Area for our other counties and are glad to add this resource for South Bay residents this year.

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019

Social Media

Number of Facebook Posts	17	Number of Tweets	20
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Join the nearly 1,500,000 Californians who claimed over \$346,000,000 in California's Earned Income Tax Credit last year! For example, 42,269 Kern County workers claimed \$13,284,958 in #CalEITC last year, could you join them this year? #money #IRS #California #Taxes #TaxCredits		Young or older, now most Californian workers 18+ and self-employed filers can claim the #CalEITC, find out if you qualify now. http://bit.ly/2BTixq8	
Number of Other Posts (Instagram, etc.)	7	Exact Messaging of Most-Liked "Other" Post	
		#Volunteers needed this tax season. Learn more here: https://lnkd.in/g-CSQgJ	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Costs for social media for the month of January continue to include compensation for staff working on our social media. The total cost was \$833.57, including \$779.04 in staff salaries and rent, and \$54.53 in administrative costs.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 This month, we continued to share posts about the Cal EITC and encouraged filers to consider prospective filing locations as they started to receive W2s and other tax documents in the mail. We also participated in the statewide and national campaigns around EITC awareness on January 25th. Along with posting content, the team members who manage social media have also needed to devote their time to answering questions from clients through direct messages. We answer a significant number of questions about how to find tax sites as well as filing-related questions. In addition to Twitter and Facebook, which are primarily client-facing, we also used LinkedIn to appeal directly to volunteers. Much of our volunteer messaging encouraged individuals to get involved with volunteering as a means to helping others receive critical tax credits.

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019

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:

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	44
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 This month, we continued to dedicate staff time to planning for canvassing through our subcontractors. Efforts include texting campaigns via Community Connect Labs (a UWCA subgrantee) and Golden State Opportunity Fund, as well as 211 and Eden Information and Referral (Eden I & R). The total cost was \$599.20, including \$560.00 for staff costs and \$39.20 for administrative costs.

2) Provide broad overview of canvassing for targeted zip codes:
 Will begin in February

3) Provide a broad overview of canvassing for non-targeted zip codes:
 Will begin in February

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

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019

sent:

Will begin in February

5) Provide broad overview of Phone Calls conducted:

Eden I & R received 44 phone calls via 211 in Alameda County in January and made more than 100 referrals to free tax preparation.

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:

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	3	14,251	3	13,099

Narrative of Expenditures in EARS and Outreach Activities

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

This month, we continued to have costs related to staff and administration, as well as costs for ad space on Bart trains and in stations, and for Facebook paid advertising. The total cost was \$18,903.70, with costs broken down as follows:

- \$2,296.73 for staff salaries and rent
- \$14,448.00 for Bart advertising (reserving space for February/March placement)
- \$922.34 for Facebook advertising
- \$1,236.69 in administrative fees

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:

We began our client-facing Facebook ads in English, Spanish, Chinese, and Vietnamese. We had three

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019
<p>We began our client-facing Facebook ads in English, Spanish, Chinese, and Vietnamese. We had three different ads in both English and Spanish, including video, still photo, and a photo carousel, and one ad each in Chinese and Vietnamese. The English ads were served 9,094 and the Spanish ads were served 1,640 times. For Chinese and Vietnamese combined, we served the ads 7,024 times and received 13,249 impressions.</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: We did not earn any media during this month.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media:</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	12,160
Number of New Individuals who Received Direct Mailers	1,800

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
This month, we spent \$6,382.51 on staff time and printed collateral material, with costs broken down as follows:

- \$567.62 for staff salaries and rent
- \$2,780.48 on additional printing of flyers and postcards

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019

- \$743.86 on site signage that promotes the Federal and Cal EITC as a reason for coming in
- \$1,873.00 in costs for EBALDC's printed materials
- \$417.55 in administrative costs

2) Provide a broad overview of flyer/brochure and poster distribution:
 In addition to continue giving collateral to our VITA sites, we also distributed material via the Santa Maria Urban Ministry and Second Harvest Food Bank in San Jose. In addition, EBALDC distributed flyers to tenants at all of 29 EBALDC properties as well as to our SparkPoint clients and partners (Laney College, SparkPoint Oakland, and Next Step Learning Center). The flyers are provided in English and Chinese.

3) Provide a listing and narrative of direct mailers that went out:
 UWBA subcontractor EBALDC sent 1,800 direct mail pieces to past VITA clients and drew on their experience serving the Chinese speaking community.

4) Any other additional information pertinent to work conducted including leveraging of other resources:
 We have added new types of site signgage to promote wayfinding and help clients learn more about the tax credits and free filing services, including sandwich boards and lawn signs. We have traditionally used banners but find that the new signage we have created has a greater opportunity to provide information to clients. We also believe that they help many of our new EITC partners, including community colleges and urban locations, to attract visitors to their sites.

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
Food Bank	95125	01/24/19	45	No
Resource Fair	94577	01/11/19	40	No
Food Bank	94621	01/08/19	25	No
Educational Forum	94541	01/31/19	30	No
Educational Forum	94612	01/12/19	13	no

Target Area	3-Alameda/Santa Clara			
Reporting Period	January 1, 2019 - January 31, 2019			
Educational Forum	94612	01/16/19	2	no
Educational Forum	94607	01/06/19	56	no
Educational Forum	94607	01/13/19	47	no
Educational Forum	94612	01/12/19	23	no
Educational Forum	94621	01/26/19	13	no
Educational Forum	94607	01/27/19	46	no

- 1) List the various activity-expenditures charging for this month and their cost:
This month, we continued to dedicate staff time to planning and hosting group events. The total cost was \$1,977.56, including \$1,848.19 in staff costs and rent, and \$129.37 in administrative costs.
- 2) Provide a brief overview of events conducted during the reporting period:
In addition to planning kick-off events in February and a number of forthcoming tax preparation events, we also presented at numerous locations in Alameda and Santa Clara County, including food banks in both counties. We also trained 211 staff with more information about the EITC and changes to the tax law, and presented to early childhood providers at First 5 in San Leandro. In addition to trainings and information sessions provided by UWBA, our partner EBALDC hosted forums for their staff and volunteers to help them learn about methods to promote the uptake of the EITC.
- 3) If members of the press attended an event, indicate which press outlets:
We did not garner any press at these events.
- 4) Any other additional information pertinent to work conducted, including leveraging of other resources:

Other

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Having the government shut down and having our SPEC team furloughed definitely lent for a challenging January. UWBA staff and our partners had to troubleshoot many basic issues on our own which left less time for outreach and education. We also have heard from clients that the shutdown made them uneasy about tax time which we have tried to alleviate in materials and communication.

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:

Target Area	3-Alameda/Santa Clara
Reporting Period	January 1, 2019 - January 31, 2019

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	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	1,384

Narrative of Expenditures in EARS and Outreach Activities

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

In January, 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 January, there were 1,210 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:

In addition to highlighting EITC and CalEITC eligibility for older adults ages 65 and above and those ages 18-24, the 2-1-1 tax information page encourages Californians whose income does not require them to file taxes, or who have never claimed the credit, to claim CalEITC and EITC. 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:

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019
<p>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).</p>	

Social Media

Number of Facebook Posts	6	Number of Tweets	7
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>2-1-1 San Diego was proud to stand alongside Toni G. Atkins Assemblymember Todd Gloria, Rick Gentry, President & CEO of the San Diego Housing Commission and Bob Annibale, Global Director of Citi Community Development and Inclusive Finance to raise awareness and use of federal and state EITC (Earned Income Tax Credits). To learn more about tax credits and eligibility, call 2-1-1!</p>		<p>The California Earned Income Tax Credit (CalEITC) is cash-back credit is 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</p>	
Number of Other Posts (Instagram, etc.)		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:

In the month of January, there were a total of 6 Facebook posts and 7 Twitter posts published. There were a total of 2,239 Facebook reaches and 5,281 Twitter impressions.

Social Media costs: 13 posts = 6.50 hours x \$41.67 per hour = \$270.86

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

In January, we raised awareness and use of federal and state EITC through social media by highlighting our collaboration with California Senate Leader Toni G. Atkins, Assemblymember Todd Gloria, Rick Gentry, President & CEO of the San Diego Housing Commission and Bob Annibale, Global Director of Citi Community Development and Inclusive Finance.

We also highlighted the start of the new tax season and VITA appointment eligibility.

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	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019

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Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	900
Canvassing in Non-Targeted Zip Codes	
New Individuals Who Received Text Messages	
Phone Calls	5,099
Office Visits	

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 gained access to the VITA Scheduling system in January, which resulted in an increase in CalEITC, and EITC Outreach & Education. 2-1-1 San Diego conducted 5,099 one-to-one phone interactions for CalEITC, EITC, and VITA through inbound and outbound activities.

Elderhelp conducted training to outreach specialists which resulted in 85 face to face education sessions with low income older adults.

2-1-1 San Diego phone calls: 4,829 inbound calls = 482.90 hours x \$24.30 per hour = \$11,734.47
270 outbound calls = 45.00 hours x \$24.30 per hour = \$1,093.50

2-1-1 San Diego contact center management:
Service Delivery Manager: 18 hours x \$41.25/hr = \$743.04
Program Assistants: 19.42 hours x \$25.50/hr = \$495.21
Director of Enrollment & Navigation Services: 24 hours x \$53.54/hr = \$1,284.96
Senior Data Analyst: 5 hours x \$54.60/hr = \$273.00

2-1-1 San Diego training: \$0 this month
Child Development Associates: \$78.00
Dreams For Change: \$3,360.48
ElderHelp: \$600.00
International Rescue Committee: \$782.01
YMCA Childcare Resource Service: \$280.00

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019

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

IRC continued door to door activities in the Month of January 2019. YMCA conducted 225 door to door outreach activities, and CDA conducted 20 Dreams for Change conducted 4,748 door to door outreach activities in the following zip codes: 91910, 91911, 92021, 92025, and 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 will be coordinated in February 2019.

5) Provide broad overview of Phone Calls conducted:

Of the 5,099 one-to-one phone interactions conducted by 2-1-1 San Diego, 870 of those were in the targeted zip codes of 91910, 91911, 92101, 92105, and 92115. The remaining 4,299 were in non-targeted zip codes.

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

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:

Billboards and Geofencing will be available in February 2019.

Billboards through Outfront Media: \$8,400

Geofencing client screening through Outfront Media: \$10,000

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

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019
<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>N/A</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media:</p> <p>N/A</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	0
Number of New Individuals who Received Direct Mailers	959

Narrative of Expenditures in EARS and Outreach Activities

<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Child Development Associates: \$228.55 Dreams For Change: \$454.24 ElderHelp: \$0 International Rescue Committee: \$822.24</p>

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019

YMCA Childcare Resource Service: \$144.00

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

2-1-1 provided flyers and posters to all sub-contractors.

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

2-1-1 distributed 959 e-mails with CalEITC, EITC, and VITA flyers to customers who completed a CalFresh application with the Enrollment Center during the Month of January. Flyers will be included in CalFresh application packets for those who prefer to receive their post-application packets starting in February 2019.

In the month of January, Dreams for Change distributed 1,344 flyers, and YMCA distributed 400.

YMCA mailed 72 flyers to families they serve. CDA conducted a Facebook and Email Campaign to reach 4,000 clients through tax season, while IRC began their mail campaign.

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

N/A

Group Events

Total Number of Events Held During the Reporting Period			10	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	92123	01/07/19	30	No
Community Gathering	92020	01/09/19	10	No
Library	92101	01/10/19	30	No
Resource Fair	92105	01/20/19	90	No
Educational Forum	92101	01/24/19	49	No

Target Area	2-San Diego			
Reporting Period	January 1, 2019 - January 31, 2019			
Mega Event	92101	01/30/19	200	Yes
Educational Forum	92123	01/25/19	50	No
Educational Forum	92123	01/29/19	20	No
Educational Forum	92123	01/30/19	15	No
Educational Forum	92123	01/31/19	30	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 6 outreach events during the month of January, reaching 409 individuals; 4 of which took place in targeted zip codes. Dreams for Change attended 3 outreach events, reaching 130 individuals. YMCA participated in Community Booths reaching 200 participants.

2-1-1 San Diego outreach presentations at meetings:

Presentation staff: 4 presentations = 0.67 hours x \$22.95 per hour = \$15.30

2-1-1 San Diego Community Booths:

Outreach Staff: 30 hours x \$24.30 per hour = \$729.00

Dreams for Change: \$796.48

YMCA Childcare Resource Service: \$672.00

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:

1/7/2019 - Fresh Start Showers Program (30 attendees)

1/9/2019 - Fresh Start Showers Program (10 attendees)

1/10/2019 - Central Library Day Event (30 attendees)

1/20/2019 - Nathan Fletcher Swearing In (90 attendees)

1/24/2019 - Library Staff Training (49 attendees)

1/30/2019 - 13th Project Homeless Connect (200 attendees)

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:

2-1-1 San Diego promoted CalEITC, EITC and VITA eligibility and services, prompting TV/News viewers to call 2-1-1 for resources.

TITLE: Free Tax Prep San Diego

PARTNERS: San Diego Housing Commission / Citi Community Development / 2-1-1 San Diego

GOVT OFFICIALS: California Senate Leader Toni Atkins and Assemblymember Todd Gloria

2-1-1 also provided partner education to the following partner meetings taking place at 2-1-1's Connections Center:

1/25/2019 - Healthy San Diego - Health Homes Workgroup (50 attendees)

1/29/2019 - Healthy San Diego - Health Homes Workgroup (20 attendees)

1/30/2019 - Healthy San Diego - Health Homes Workgroup (15 attendees)

1/31/2019 - Healthy San Diego - Health Homes Workgroup (30 attendees)

Other

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019
Category	Actual (#)
Recording Played to Callers	16,502

Narrative of Expenditures in EARS and Outreach Activities

The following automated recording was added to the IVR for incoming calls in January 2019:

“Did you know that households with less than \$55,000 annual income may qualify for free tax preparation assistance, and could also collect up to thousands of dollars of Earned Income Tax Credits? Be sure to ask your representative for more information or visit our website, 211sandiego.org. If you're calling specifically for tax information press #”

Message recording cost: 6 hours x \$41.28 per hour = \$248.00

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

In January 2019 Community Connectors began receiving incoming calls from returning clients wanting to schedule a VITA appointment, before that location was available in the VITA scheduling system. The Federal Government shutdown was a contributing factor to delaying appointment availability, as it was still unclear as to when VITA sites would be able to submit taxes on behalf of clients, and law changes for the 2018 tax season were unknown.

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:

Target Area	2-San Diego
Reporting Period	January 1, 2019 - January 31, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Koreatown Youth and Community Center
Grantee Representative	Gabrielle Maestas
Telephone Number	(213) 365-7400
Email Address	gmaestas@kyccla.org
Contract Number	18T-8003
Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	7,916

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 **\$2,157.59** for the month of January. The expenditure (\$2,589.11) 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 updated 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.

In January, the CSU Northridge sites were added to the Free Tax Prep LA website in partnership with CSU5 Cal VITA expansion grantee. Each site includes a link to their booking portal and site information so clients can either book online or call for tax services. This expands Free Tax Prep LA to **12 additional VITA locations** it cover more residents living in the San Fernando Valley.

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 partners include the Mayor of Los Angeles, Eric Garcetti, City of Los Angeles Controller Ron Galperin, United Way of Greater Los Angeles, LA County Department of Business and Consumer Affairs,

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>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.</p>	

Social Media

Number of Facebook Posts	82	Number of Tweets	146
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>Throwback Thursday: Last year, VITA volunteers helped prepare over 260 tax returns during our Free Tax Prep LA Tax Day Marathon and returned nearly \$250K to families in need!</p>		<p>Tomorrow is #EITCAwarenessDay. Did you know you can earn up to \$6,000 back, just for filing your #taxes? Find out if you qualify by visiting CalEITC4Me.org or click here: bit.ly/2LolrrX #EITCAwarenessDay</p>	
Number of Other Posts (Instagram, etc.)	49	Exact Messaging of Most-Liked "Other" Post	
		<p>It's that time of year again! #taxseason</p>	

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 Social Media expenditure was **\$2,157.59** for the month of January. The expenditure (\$2,589.11) was for administering social media hits by the lead agency.

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, Chinese, and Spanish. The January social media messages focused on information on the expanded EITC, VITA success stories, and VITA services. Additionally, an abbreviated social media calendar was developed to share with partners, like elected officials and government agencies. Twitter had **49,000** impressions and Facebook had **12,157** organic impressions.

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, United Way of Greater Los Angeles, and First 5 Los Angeles. Messages and graphics are also shared with fellow grantee Youth Policy Institute and includes content created by CalEITC4me.

Canvassing

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	458
Canvassing in Non-Targeted Zip Codes	390
New Individuals Who Received Text Messages	3,657
Phone Calls	2,791
Office Visits	2,956

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 **\$2,157.59** for the month of January. The expenditure (\$2,589.11) was for administering canvassing by the lead agency.

- 2) Provide broad overview of canvassing for targeted zip codes: Canvassing door-door was launched in January. Subagencies canvassed their community in a mass one-week period before the start of tax season. All sub agencies provided canvassing plans and notices to residents before going door to door. The largest door-to-door canvassing was in public housing in Watts that reached over **200 individuals** in 4 days with 10 volunteers and staff.

- 3) Provide a broad overview of canvassing for non-targeted zip codes: Subagencies located in nontargeted zip codes also participated in the large 4 day canvassing event. Agencies also covered low-income housing buildings that are operate by, or already served by the agency. More so, all subagencies are located in very low-income areas.

- 4) Provide broad overview of text messages sent out, including the total number of text messages sent: We utilized the service "Simple Texting" to send out customized messages for each of the Family Source Centers. We coordinated a message specific to their location and sent out over **3,600** texts to the numbers they provided. We were able to send messages out in English and in Spanish. Messages were sent to clients enrolled at the subagency and may have already used a service from them before. All text recipients provided consent last year to receive text messages.

- 5) Provide broad overview of Phone Calls conducted: Customers call the free tax prep los angles phone appointment line for their appointment. Customers listen to a recorded message about services, EITC, and how to qualify. There are over **100** callers in English, Korean, and Spanish that listen to the recording daily.

- 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	January 1, 2019 - January 31, 2019			
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		
Transit Advertisements	220	5,500,000		
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	92	46,000	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 expenditures was **\$2,157.59** for the month of January.

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: This month, the transportation ads went up (bus benches and bus shelters) across the City and County of Los Angeles. Each transportation ads (**220**) earns **100,000 impressions** per month. The ads will be up until April 15th this year.

Transportation Ads

100,000 impressions/4 weeks = 25,000 times the number of ads (220) or 5,500,000 impressions in the first month

Wall ads (**92**) also went up. The ads are in low-income zip codes at convenient store, gas stations, and check cashing stores with street and foot traffic.

Wall Ads

2,000 impressions/4 weeks = 500 times the number of ads (92) or 46,000 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: In January we launched the Free Tax Prep LA Chinese language media event. The event was held at our largest tax preparation partner, Chinatown Service Center, who announced a new VITA site in the City of Alhambra. Please, see attached listings of the press event - over **15 media sources** reported on the press event.

4) Indicate any leveraging of other resources conducted this month in regards to media: Most of this month was used to plan and prepare for the English/Spanish media events planned for February. Partners from the City and County of Los Angeles and United Way of Greater Los Angeles contributed their contacts in planning.

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	4,326
Number of New Individuals who Received Direct Mailers	980

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 Collateral Messaging expenditure was **\$2,157.59** for the month of January. The expenditure (\$2,589.11) was for administering messaging by the lead agency.

- 2) Provide a broad overview of flyer/brochure and poster distribution: Over **4,000** pieces of collateral was disseminated at subagencies (at the center or at community events). All new clients undergo a screening process and receive information about free tax services. More so, clients receive the information in workshops, trainings, and giveaways.

 This month we disseminated all of the Cal EITC (FTB resource) and FTPLA collateral materials subagencies. These materials included flyers (English and Spanish), banners, financial planning/savings cards, and hashtag signs (for taking pictures of tax clients for marketing purposes). Outreach items at each center are consistent with branding on the streets (wall ads and transportation ads), web, social media, etc.

- 3) Provide a listing and narrative of direct mailers that went out: 2 agencies shared direct mailers went out to clients to remind them to about the start of tax season. The mailers were either letters (El Nido South LA) or brochures (Centro de Ayuda). The mailers reached almost **1,000** individuals.

- 4) Any other additional information pertinent to work conducted including leveraging of other resources: Los Angeles Trade Tech College sent an email to all students, nearly **16,000** individuals. The information included the new Cal EITC, Tax credits for college students, and information on where to access help, at www.freetaxprepla.com.

Group Events

Total Number of Events Held During the Reporting Period			49	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	90011	01/15/19	9	No
Resource Fair	90037	01/26/19	35	No

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
Community Gathering	90032	01/30/19	37	No
Community Gathering	90032	01/30/19	20	No
Educational Forum	90004	01/23/19	35	No
Community Gathering	90026	01/19/19	60	No
Educational Forum	90004	01/24/19	45	No
Community Gathering	90004	01/16/19	50	No
Educational Forum	90044	01/25/19	28	No
Community Gathering	91770	01/10/19	30	No
Mega Event	91768	01/20/19	1,000	Yes
Community Gathering	91754	01/27/19	450	No
Educational Forum	90032	01/16/19	42	No
Educational Forum	90032	01/23/19	42	No
Educational Forum	90032	01/30/19	42	No
Educational Forum	90012	01/30/19	30	No
Mega Event	90012	01/31/19	25	Yes
Community Gathering	90026	01/24/19	20	No
Educational Forum	90310	01/24/19	34	No
School	90003	01/24/19	10	No
Educational Forum	90033	01/27/19	20	No
Resource Fair	90037	01/26/19	100	No
Community Gathering	90043	01/26/19	150	No
Community Gathering	90017	01/17/19	100	No
Community Gathering	90017	01/18/19	50	No
Community Gathering	90026	01/23/19	35	No
Community Gathering	90017	01/24/19	100	No
Community Gathering	90017	01/26/19	100	No
Educational Forum	90057	01/29/19	60	No
Community Gathering	90710	01/08/19	35	No
Community Gathering	90744	01/14/19	25	No
Resource Fair	90744	01/23/19	27	No
Community Gathering	90744	01/24/19	44	No
Community Gathering	90001	01/15/19	62	No

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
Resource Fair	90011	01/15/19	39	No
Community Gathering	90059	01/15/19	96	No
Community Gathering	90059	01/26/19	85	No
School	90003	01/26/19	76	No
Educational Forum	90310	01/31/19	34	No
Educational Forum	90007	01/10/19	20	No
Educational Forum	90020	01/05/19	18	No
Educational Forum	90020	01/08/19	22	No
Educational Forum	90020	01/09/19	15	No
Educational Forum	90020	01/10/19	20	No
Educational Forum	90020	01/15/19	14	No
Educational Forum	90020	01/16/19	18	No
Educational Forum	90020	01/17/19	16	No
Educational Forum	90010	01/08/19	12	No
Community Gathering	90004	01/31/19	20	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 Social Media expenditure was **\$2,157.61** for the month of January. The expenditure (\$2,589.11) was for administering community events by the lead agency.

2) Provide a brief overview of events conducted during the reporting period:
 For the month of January subagencies reported outreach events targeted to low-income residents of Los Angeles, such as parent night at schools, 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. There was no cost to the grant for the canvas bags as they were free from the agency and included VITA/EITC flyer inside. In the event, there was a resource booth collecting names and phone numbers of individuals interested in more information .

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

Many subagencies reported to assist school teachers and parents during the LAUSD strikes, serving as a meeting place before and after marching. At the meetings, both families and teachers learned about the many services available to them, including free tax services. In total, **3,457** individuals were reached by the group events.

3) If members of the press attended an event, indicate which press outlets:
 Chinatown Service Center hosted a press event for Free Tax Prep LA and their tax prep services this VITA season. This was a unique opportunity to partner with an organization that can advertise VITA services to a population that speaks languages other than English and Spanish. The attending press included: EPOCH Times, International Daily News, Singtao.com, uschinapress.com, Chinese News USA, huarnone.org, World Journal, Chinese in LA, chinesedaily.com, usaphoenixnews.com, Taiwan Times, and China Daily. It is estimated that this has reached over **400,000 Chinese Americans living in the City and County of Los Angeles.**

4) Any other additional information pertinent to work conducted, including leveraging of other resources: The Free Tax Prep LA has been working with LAUSD to provide tax services on-site to families and staff. This is a large effort to support struggling families at a place familiar to them. Over **15** dates are set for February and March for tax events at LAUSD schools.

Other

Category	Actual (#)
Community Engagement	Meet with social service agencies and government offices regarding VITA services, EITC eligibility, and tax day events. Met with 15 organizations and LAUSD schools.

Narrative of Expenditures in EARS and Outreach Activities

N/A

Challenges and Success Stories

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

Challenge(s) Faced During the Reporting Period

Narrative of Success Stories

Success Story #1

Date of Success Story: 1/29/2019

Name of Person from Success Story: Ilesha Smith

Zip-Code Where Person Lives: 90044

VITA Site where person got taxes done (if applicable): Menlo Family Housing (Tax day event by Children's Bureau)

Narrative: Ms. Smith has not had fulltime work in 3 months. She has been caring for her youngest daughter that has an undiagnosed medical issue. She urgently wanted to have her taxes prepared before a fraudulent taxpayer that has in the past, filed a return using one of her children's information. The return was prepared and submitted with no issues. She shares that the EITC and CalEITC she received (totaling \$5,000) will be her main source of income for the next months. She is also relieved to have her return prepared with no issues and so quickly.

Success Story #2

Date of Success Story: 1/26/2019

Name of Person from Success Story: Ms. James

Zip-Code Where Person Lives: 90038

VITA Site where person got taxes done (if applicable): Koreatown Youth and Community Center

Narrative: Ms. James and her 2 children are undergoing many life style changes. The family fled their abusive father and had no access to their social security cards. When requesting tax services, a volunteer sat with the client to prepare the return on MyFreeTaxes.org. Since she needed to collect many documents - she came to the VITA site each night it was open to continue to complete the return. After the third visit - she was able to bring everyone's social security cards and verify that she prepared her own return accurately. She was so pleased to have the individual attention and empowered by having to do her own return. She returned to the site to have her photo taken and story collected. Ms. James will receive the Federal EITC and anticipates a refund of \$2,200 to assist her in her move to her own apartment.

Success Story #3

Date of Success Story:

Name of Person from Success Story: Ms. Denise Perez

Zip-Code Where Person Lives: 90001

VITA Site where person got taxes done (if applicable): All People's Community Center

Narrative: Ms. Perez filled her return and was estatic to benefit in nearly \$9,000 in credits and tax refunds. She shared that she will be purchasing her first car and won't need to go all over town with her children on

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>public transportation. She also signed up to participate in the grocery pantry program and afterschool programming for 2 of her children.</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-8002
Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

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 GSOF conducts Web activity through the 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

Social Media

Number of Facebook Posts	Number of Tweets
Exact Messaging of Most-Liked Facebook Post	Exact Messaging of Most-Favorited Twitter Post
0	0
Number of Other Posts (Instagram, etc.)	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:
 N/A GSOF conducts Social Media activity through the Statewide 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

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

social media: N/A

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	630
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	2,250
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 Costs: \$46,806
 Texting Managment: \$1,875 (\$75/H - 25 hours)
 LA Program Director: \$6,000 (Salary)
 Grassroots Cordinator: \$3,500 (Salary)
Total Canvassing: \$58,181

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

Antelope Valley Partners for Health 01/07/19 - Lancaster - 80 interactions
 Mesquite Elementary 01/29/19 - Lancaster - 45 Interactions
 Harrison Elemntary 1/9/2019 - Los Angeles - 10 Inteactions
 Mexican Consulate 01/08/19 - Los Angeles - 100 Interactions

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>Mexican Consulate 01/08/19 - Los Angeles - 100 Interactions Camino Nuevo Jose Castellanos (School) 1/30/19 - Los Angeles 90007 - 50 Inteactions Virgil Middle School 1/28/19 - Los Angeles - 100 Interactions Pacifico Coin Laundrymat 1/31/19 - Los Angeles 90057 - 65 Interactions wilmington senior center 01/03/2019 - Willmington - 150 Interactions Women health fair - 01/08/2019 - San Pedro 90731 - 30 Interactions</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>The texting program began slowly in January, with 2,250 texts, most through follow-ups to sign-ups on website or texting membership lists from partner organizations. The reason the expense is so high is that GSO has pre-paid Relay (Texting Software) to drive down costs. Relay base price is \$.08 per text, the prepayment allows us to have a price of\$.06 per text.</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: N/A</p>	

Media				
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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				
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Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

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

Facebook Ads: \$1,792 (No Ads running yet in LA, expenses cover GSO staff time and consultant time for creating media plan.)
 Press Coordination: \$5,000.00
 Digital Ethnic Media: \$10,000
 Print Ethnic Media: \$10,000

Total Media: \$26,792

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 Ads have began running in January, Ads likely to run at the end of February or early march. This strategy is used because the beginning of Tax season does not need as much marketing to get people to file their taxes. Waiting until later in the tax season to begin Ads allows us to reach the people who have not filed yet and may need assistance.

An example of the upcoming Ad will reflect our young adult and older adult messaging and collateral.



Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

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:

Expenses for Press Coordination include GSO staff time for Communications Manager to work on press event for upcoming Free Tax Prep event in LA, upcoming Youth Launch event in Santa Barbara, and other potential press events. Work includes sending out press release to list of LA media contacts, and follow-up to confirm attendance.

Expenses for Ethnic Media Print and Digital are the upfront payments for Penny Empire (PE) to provide media placement and content creation services for the CalEITC4Me California Campaign.

Ethnic Media Ads to run on LA Opinion and LA Focus during the first week of March

GSO team was able to conduct a 1 hour interview on Spanish Radio to promote Cal EITC. The radio interview was live on Jan. 23. More info about the radio segment:

La Cooperativa Campesina de California runs the monthly La Voz newsletter. Typically, we try to have an expert guest cover articles in the newsletter in the corresponding month's radio show on the Radio Bilingüe network.

Radio Bilingüe is a non-commercial, bilingual, Latino-owned and operated public radio network headquartered in Fresno, California. It was founded in 1976 by farmworkers and others who believed in using community radio to effectively reach Latino families with high-quality programming and information relevant to their culture and lives. The broadcast will take place through Radio Bilingües network of six full-power FM radio stations and 7 repeater stations on air in California as listed below. Radio Bilingüe also has a website, www.radiobilingue.org, and will be conducting a live web stream of the broadcast.

With the additional repeater stations, Radio Bilingüe has increased their listeners to 300,000 per week in California with at least 50 percent of the listeners classified as low-income. They also reach out nationally through a network of over 65 affiliated public radio stations.

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

Collateral Messaging	
Category	Metrics
Number of Flyers/Brochures Distributed	175,000
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

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

Printing and Distribution: \$16,239.94

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

Eligibility Flyers - 150,000
 Benefits Checklist - 20,000
 Self-Employed Postcards - 5,000

Flyers went out to partner organization/grantees in LA region. Partners include:
 Central City Neighborhood Partners
 El Monte Promise Foundation
 AVPH
 Eastmont Community Center
 Clinica Romero
 MAOF
 ELACC

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

Group Events

Total Number of Events Held During the Reporting Period			14	
Location	Zip Code	Date	Attendance	Press at Event?
School	93535	1/26/2019	100	No
Health Care Clinic	93535	1/26/2019	100	No
Community Gathering	90015	1/20/2019	30	No
Community Gathering	90031	1/11/2019	27	No
Educational Forum	90042	1/26/2019	40	No
Health Care Clinic	90006	1/10/2019	40	No
Resource Fair	90026	1/16/2019	60	No
School	90017	1/18/2019	55	No
Resource Fair	90004	1/18/2019	50	No

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
Educational Forum	90001	1/15/2019	62	No
Educational Forum	90011	1/15/2019	39	No
Community Gathering	90059	1/16/2019	96	No
Free Tax Prep	90059	1/26/2019	85	No
Community Gathering	91754	1/9/2019	200	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:

Many of the events listed above are outreach events conducted in partnership with local organization. The type of events range from a presentation at a Parent meeting at a school such as John Liechti Middle School or Lancaster School district.

Other very effective locations for an event is to host a table at a health fair or community event.

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

Other

Category	Actual (#)
GSO Admin	0

Narrative of Expenditures in EARS and Outreach Activities

GSO Admin costs to cover expenses not included in categories above, or just general staff time to complete reports and attend meetings.

GSO Admin - \$2,375.00

Challenges and Success Stories

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
Challenge(s) Faced During the Reporting Period	
No Challenges to report at this time	
Narrative of Success Stories	
No success stories to report at this time.	

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn	Contract Number: 18T-8002	Report Period: 1/1/19 - 1/31/19	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	58,181.00
4.	Media	26,792.00
5.	Collateral Messaging	16,239.94
6.	Group Events	5,000.00
7.	Other 1	.00
8.	Other 2	2,375.00
	Total	108,587.94
20 - TOTAL COSTS		
1.	Total Costs	108,587.94
	Total	108,587.94

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:
02/20/2019

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: 1/1/19 - 1/31/19	Adjustment: 0
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Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a
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10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	.00	
2.	Social Media	.00	
3.	Canvassing	28,535.00	
4.	Media	10,024.50	
5.	Collateral Messaging	775.26	
6.	Group Events	2,500.00	
7.	Other 1	.00	
8.	Other 2	1,000.00	
	Total		42,834.76
20 - TOTAL COSTS			
1.	Total Costs		42,834.76
	Total		42,834.76

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:
02/20/2019

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: 1/1/19 - 1/31/19	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	28,035.00
4.	Media	652.50
5.	Collateral Messaging	.00
6.	Group Events	2,500.00
7.	Other 1	.00
8.	Other 2	1,500.00
Total		32,687.50

20 - TOTAL COSTS

1.	Total Costs	32,687.50
Total		32,687.50

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:
03/12/2019

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: 1/1/19 - 1/31/19	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	38,625.00
2.	Social Media	4,000.00
3.	Canvassing	44,444.00
4.	Media	25,397.00
5.	Collateral Messaging	10,000.00
6.	Group Events	.00
7.	Other 1	10,000.00
8.	Other 2	3,758.00
Total		136,224.00
20 - TOTAL COSTS		
1.	Total Costs	136,224.00
Total		136,224.00

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:
02/20/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

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

60480 - Golden State Opportunity Fndtn - 18T-8015 - Approved Data

execute sp_ears_ytd_report 'TContiLuetke','18T-8015','EDUCATION-OUTREACH',1,3,9

EDUCATION AND OUTREACH ACTIVITIES	Projected	10/15/18-11/30/18	12/1/18-12/31/18	1/1/19-1/31/19	YTD	% Used
Web	0.00	0.00	0.00	0.00	0.00	
Social Media	0.00	0.00	0.00	0.00	0.00	
Canvassing	45000.00	1050.00	1050.00	22050.00	24150.00	53.67%
Media	60000.00	0.00	0.00	12431.50	12431.50	20.72%
Collateral Messaging	0.00	0.00	0.00	0.00	0.00	
Group Events	0.00	0.00	0.00	0.00	0.00	
Other 1	5000.00	625.00	625.00	625.00	1875.00	37.50%
Other 2	0.00	0.00	0.00	0.00	0.00	
Subtotal:	110000.00	1675.00	1675.00	35106.50	38456.50	34.96%
TOTAL COSTS	Projected	10/15/18-11/30/18	12/1/18-12/31/18	1/1/19-1/31/19	YTD	% Used
Total Costs	110000.00	1675.00	1675.00	35106.50	38456.50	34.96%

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Koreatown Youth & Comm Ctr Inc		Contract Number: 18T-8003	Report Period: 1/1/19 - 1/31/19	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		2,157.59	
2.	Social Media		2,157.59	
3.	Canvassing		2,157.59	
4.	Media		2,157.59	
5.	Collateral Messaging		2,157.59	
6.	Group Events		2,157.61	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			12,945.56
20 - TOTAL COSTS				
1.	Total Costs			12,945.56
	Total			12,945.56
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: 03/18/2019
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: 1/1/19 - 1/31/19	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	320.00		
2.	Social Media	500.00		
3.	Canvassing	10,500.00		
4.	Media	26,832.14		
5.	Collateral Messaging	16,452.49		
6.	Group Events	6,877.18		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	61,481.81		
20 - TOTAL COSTS				
1.	Total Costs	61,481.81		
	Total	61,481.81		
<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): Ann Truxaw-Ramirez / Grants/Proposal Development Manager		Signature:		Date: 02/20/2019
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: 1/1/19 - 1/31/19	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		807.28	
2.	Social Media		833.57	
3.	Canvassing		599.20	
4.	Media		18,903.77	
5.	Collateral Messaging		6,382.51	
6.	Group Events		1,977.56	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			29,503.89
20 - TOTAL COSTS				
1.	Total Costs			29,503.89
	Total			29,503.89
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: 02/20/2019
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: 1/1/19 - 1/31/19	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		374.81	
2.	Social Media		387.02	
3.	Canvassing		278.20	
4.	Media		8,776.75	
5.	Collateral Messaging		2,032.83	
6.	Group Events		918.15	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			12,767.76
20 - TOTAL COSTS				
1.	Total Costs			12,767.76
	Total			12,767.76
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: 02/20/2019
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: 1/1/19 - 1/31/19	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		303.14	
2.	Social Media		928.71	
3.	Canvassing		192.60	
4.	Media		16,979.54	
5.	Collateral Messaging		11,553.39	
6.	Group Events		1,042.63	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			31,000.01
20 - TOTAL COSTS				
1.	Total Costs			31,000.01
	Total			31,000.01
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: 02/20/2019	
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: 1/1/19 - 1/31/19	Adjustment: 0
Prepared by (Name/Title): Wesley Samms / Development Coordinator		E-mail Address: wsamms@unitedwaysca.org	Telephone: 214-773-8848	Fax Number: 877-908-8922
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		3,030.89	
2.	Social Media		3,586.80	
3.	Canvassing		13,163.86	
4.	Media		17,249.35	
5.	Collateral Messaging		19,547.42	
6.	Group Events		3,355.21	
7.	Other 1		749.41	
8.	Other 2		.00	
	Total			60,682.94
20 - TOTAL COSTS				
1.	Total Costs			60,682.94
	Total			60,682.94
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: 02/21/2019
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: 1/1/19 - 1/31/19	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		.00	
2.	Social Media		.00	
3.	Canvassing		11,091.55	
4.	Media		1,359.55	
5.	Collateral Messaging		977.01	
6.	Group Events		4,274.40	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			17,702.51
20 - TOTAL COSTS				
1.	Total Costs			17,702.51
	Total			17,702.51
<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: 02/20/2019	
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: 1/1/19 - 1/31/19	Adjustment: 0
Prepared by (Name/Title): Suliana Juarez / Director of Operations		E-mail Address: Sjuarez@uwfm.org	Telephone: 559-243-3665	Fax Number: 5592288159
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		190.00	
2.	Social Media		95.00	
3.	Canvassing		14,594.03	
4.	Media		523.68	
5.	Collateral Messaging		1,051.26	
6.	Group Events		.00	
7.	Other 1		3,044.16	
8.	Other 2		.00	
	Total			19,498.13
20 - TOTAL COSTS				
1.	Total Costs			19,498.13
	Total			19,498.13
<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: 02/20/2019
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: 2/1/19 - 2/28/19	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		312.53	
3.	Canvassing		131,074.24	
4.	Media		.00	
5.	Collateral Messaging		6,648.27	
6.	Group Events		1,997.99	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			140,033.03
20 - TOTAL COSTS				
1.	Total Costs			140,033.03
	Total			140,033.03
<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 / CFO		Signature:		Date: 03/19/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	

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

60001 - Amador-Tuolumne CAA - 18T-8016 - Approved Data

execute sp_ears_ytd_report 'JCastellon','18T-8016 ','EDUCATION-OUTREACH',1, 4,9

EDUCATION AND OUTREACH ACTIVITIES	Projected	10/15/18-11/30/18	12/1/18-12/31/18	1/1/19-1/31/19	2/1/19-2/28/19	YTD	% Used
Web	6470.00	689.11	223.24	695.54	319.60	1927.49	29.79%
Social Media	8500.00	536.16	860.28	1201.95	716.88	3315.27	39.00%
Canvassing	3850.00	205.44	376.78	1041.63	444.03	2067.88	53.71%
Media	26120.00	1454.86	1347.32	2380.82	8882.00	14065.00	53.85%
Collateral Messaging	29230.00	1667.28	1037.70	2269.29	2168.61	7142.88	24.44%
Group Events	14150.00	985.91	440.72	1172.40	956.21	3555.24	25.13%
Other 1	5010.00	485.77	195.65	665.42	1161.38	2508.22	50.06%
Other 2	16670.00	3404.94	1899.75	1240.05	1677.01	8221.75	49.32%
Subtotal:	110000.00	9429.47	6381.44	10667.10	16325.72	42803.73	38.91%
TOTAL COSTS	Projected	10/15/18-11/30/18	12/1/18-12/31/18	1/1/19-1/31/19	2/1/19-2/28/19	YTD	% Used
Total Costs	110000.00	9429.47	6381.44	10667.10	16325.72	42803.73	38.91%

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: CAC of Santa Barbara County		Contract Number: 18T-8014	Report Period: 2/1/19 - 2/28/19	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	2,057.75		
2.	Social Media	2,150.71		
3.	Canvassing	3,732.75		
4.	Media	1,758.81		
5.	Collateral Messaging	9,674.35		
6.	Group Events	968.56		
7.	Other 1	1,674.65		
8.	Other 2	.00		
	Total	22,017.58		
20 - TOTAL COSTS				
1.	Total Costs	22,017.58		
	Total	22,017.58		
<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 / Chief Financial Officer		Signature:		Date: 03/29/2019
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: 2/1/19 - 2/28/19	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			713.72
2.	Social Media			600.15
3.	Canvassing			5,789.35
4.	Media			808.36
5.	Collateral Messaging			5,379.11
6.	Group Events			1,606.94
7.	Other 1			.00
8.	Other 2			.00
	Total			14,897.63
20 - TOTAL COSTS				
1.	Total Costs			14,897.63
	Total			14,897.63
<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: 03/19/2019
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	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	33096

Narrative of Expenditures in EARS and Outreach Activities

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

UWCA Staff Time & Benefits = \$1,250.62, Indirect = \$495.47 (Total = **\$1,746.09**) INLAND EMPIRE: NA, INLAND VALLEY: Web hosting, analytics, and staff time: **\$250**, KERN: Staff Time: **\$124**. MERCED: N/A. MONTEREY: Staff Time: **\$120**. Northern California: NA. NORTHERN SANTA BARBARA: LiveStory Staff Training: **\$1,000**. SANTA BARBARA: Staff Time: **\$150**. SAN LUIS OBISPO: NA VENTURA: Consultant Staff Time: **\$100**. WINE COUNTRY: NA, NORTH COAST OPPORTUNITIES: Website Design: **\$2,813**.

Subtotal: **\$6,303.09** (see Stanislaus/San Joaquin for additional expenditures)

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

UWCA: Updated Myfreetaxes.org website. UWCA worked with vendor to update website look and content, and integrate new chatbot information into the website. Had 18,872 EITC web hits. INLAND EMPIRE: NA, INLAND VALLEY: Updated EITC page with additional VITA sites and information for tax payers as to where they can find more information on EITC, CalEITC, and VITA. Staff time spent to develop content and maintain EITC page. There were 2,339 website hits. KERN: Website updates and pulling insights for reporting purposes. There were 436 website hits. MERCED: N/A, MONTEREY: Updated CalEITC webpage. There were 2,195 website hits. NORTHERN CALIFORNIA: NA. NORTHERN SANTA BARBARA: Heather Kunkle completely trained on LiveStories in February. Working with past VITA/MFT/CalEITC results to create an interactive web page in March that displays local results. Will share LiveStory with UWCA when published in March. Heather managed the DNS for MyFreeTaxes.org to ensure all searches led to functional pages. There were 3,590 website hits. SANTA BARBARA: Staff revised EITC and VITA related webpages that went live in December 2018. Staff also responded to website

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

inquiries for EITC and VITA services. Staff also wrote an e-newsletter story to help educate potential filers. There were 3,000 website hits. SAN LUIS OBISPO: NA. VENTURA: Consultant monitored web analytics and made recommendations for enhancements to drive more traffic, e.g. improving page position in relevant searches. Website content includes eligibility for VITA program, with option to call 211 to schedule an appointment or file online using MyFreeTaxes; list of what documents needed; CalEITC chart; and downloadable copy of the VITA flyer. 136 (85%) of hits were unique hits. The Free Tax Prep page was the most popular page on the website next to the homepage. We will use the page view analytics to analyze effectiveness of our social media in driving people to the page. The top Google searches that resulted in the page showing up in search results: tax preparation, free tax preparation and VITA United Way. WINE COUNTRY: We have a home page news story on our website linking visitors to more information about free tax prep including a link on the page to CalEITC information. We had 2,528 EITC webhits. NORTH COAST OPPORTUNITIES: Designed and placed web messaging on website. The NCO website now displays the CalEITC logo, along with the EKS logo on the opening website banner. The CalEITC is also on the VITA appointment request page.

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

Social Media

Number of Facebook Posts	112	Number of Tweets	102
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
We help you file your taxes for free. Get more \$\$\$ back in your pocket with CalEITC. Text CalEITC to 51555 to get started!.		Are you self-employed? Don't forget any business expenses, and if you earned less than \$25,000, also don't forget to see if you qualify for the #CalEITC credit during tax time. Find out if it can help you. http://bit.ly/2BTixq8	
Number of Other Posts (Instagram, etc.)	33	Exact Messaging of Most-Liked "Other" Post	
		See sample messages below from subcontractors	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 UWCA Staff Time & Benefits = \$1,556.47, Social Media Tools = \$59, Indirect = \$495.47 (Total = **\$2,110.61**);
 INLAND EMPIRE: NA, INLAND VALLEY: Staff Time: **\$250**. KERN: Staff Time: **\$481.75**. MERCED: Staff Time: **\$435**. MONTEREY: Staff Time: **\$500**. Northern California: NA. NORTHERN SANTA BARBARA: Staff Time: **\$173**. SANTA BARBARA: Staff Time: **\$350** SAN LUIS OBISPO: NA VENTURA: Staff Time: **\$138.46**. WINE COUNTRY: Staff Time: **\$27.80**. NORTH COAST OPPORTUNITIES: Staff Time: **\$1,409.85**

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

Subtotal: \$5,876.47 (see Stanislaus/San Joaquin for additional expenditures)

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

UWCA worked to develop and share social media editorial content as well as develop new and updated graphics with graphic Designer.

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:

United Ways of California most liked posts are reflected in earlier section (above). Our subgrantees report the following as most-liked posts:

INLAND EMPIRE: There were 13 posts as recommended by UWCA were used for both Twitter and Facebook.. Most liked Facebook Post: "Make your voice heard. Join us in fighting for the #health of every person in every community. <http://unitedway.co/2tcy2HD> #ProtectOurCare #Fight4OurCare #CHIPworks #ProtectOurHealth #MedicaidMatters #ACAWorks #ItsLifeCare #Care4All". Most liked Twitter tweet: "Ensuring the #health & well being of #children in the U.S. has never been more critical to the nation's economic future. <http://bit.ly/2yb28OH> #ProtectOurCare #Fight4OurCare #CalEITC #EITC #ItsYourMoneyGetIt #BenefitKitchen #CHIPworks #ProtectOurHealth" INLAND VALLEY: Stylized content from UWCA to be local. 2 staff prepared 11 Facebook post and 10 Twitter tweets. Shared posts with network. Reminded micro influencers to share and magnify message. Encouraged engagement at in-person events. Most liked Facebook post: "Are you self-employed? Don't forget any business expenses, and if you earned less than \$25,000, also don't forget to see if you qualify for the #CalEITC credit during tax time. Find out if it can help you. <http://bit.ly/2BTixq8>". Most liked Twitter tweet: "Are you self-employed? Don't forget any business expenses, and if you earned less than \$25,000, also don't forget to see if you qualify for the #CalEITC credit during tax time. Find out if it can help you. <http://bit.ly/2BTixq8>". KERN: This Month was all about spreading awareness of the commence of VITA in our community. As well as sharing to the community about the many volunteers who are helping to provide VITA assistance this year. We've also boosted our posts about where to find a VITA site. Other social media posts were ones that were in UWCA social media calendar. They made 27 facebook posts, 5 Twitter tweets, and one Instagram post which was the most liked: ""Thank you @univisionfresno for having us! Make sure to tune in on our interview about VITA and CalEITC! #VITA #CalEITC #KVP". Most liked Facebook Post: ""Our CalEITC Specialist Annelisa Perez, doing her presentation on VITA at the Central Valley Regional Migrant Education Parent Conference

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019
<p>at CSUB". Most Liked Twitter Tweet: "Are you self employed? Don't forget any business expenses, and if you earned less than \$25,000 also don't forget to see if you qualify for the #CalEITC credit during the tax time. Find out if it can help you". MERCED: Posted 13 Facebook posts, 15 Twitter tweets, and 10 Instagram posts. The most liked Facebook post was: "Am I eligible for #CalEITC even if I don't owe any income tax? YES and you don't have to pay to file. http://bit.ly/2saruWJ @nysandoval86 @unaimi @GavinNewsom @CASenCaballero". The most liked tweet was: "Did you know? The largest population of EITC recipients are single." The most liked Instagram post: "@UnitedWayMerced Am I eligible for #CalEITC even if I don't owe any income tax? YES and you don't have to pay to file. http://bit.ly/2saruWJ @nysandoval86 @unaimi @GavinNewsom @CASenCaballero". MONTEREY: Crafted, scheduled, and posted 7 Facebook, 7 Twitter, and 4 Instagram social media posts that spread awareness of the CalEITC credit, who qualifies, and how to find more information. Their most liked facebook post was: "It's tax time. Don't let free tax prep pass you by! Find one of 12 VITA sites around Monterey County to have your taxes prepared for free by IRS Certified volunteers. Get your full refund and any credits you deserve, like the California Earned Income Tax Credit (#CalEITC) without any hidden fees. Make VITA your next stop. Find locations and more info at http://unitedwaymcca.org/freetaxprep". Their most liked Twitter tweet was: "Have you seen our VITA ad around the county? Don't let free tax prep pass you by. Call 211 to set an appointment or stop by a free VITA tax prep site. Trained volunteers can help you get your full refund and any tax credits, like #CalEITC. Visit https://bit.ly/2Htsksi for info". Their most liked Instagram post was: "Join the nearly 1,500,000 Californians who claimed over \$346,000,000 in #CalEITC last year! For example, 13,617 Monterey County workers claimed \$3,432,510 in CalEITC last year, could you join them this year? #taxcredit". NORTHERN CALIFORNIA: NA. NORTHERN SANTA BARBARA: Heather Kunkle, Digital Media Specialist managed full NSBCUW digital media presence. Posted 12 times on Facebook and Twitter, and once on Instagram. The Most liked Facebook Post was: "Show your employees how to have their taxes done for free! Absolutely no fees or strings attached". The most liked Instagram post was: "Have you scheduled your FREE in-person or online tax assistance appointment yet? Visit MyFreeTaxes.org to learn more and schedule your appointment today." SANTA BARBARA: Staff drafted and posted social media 7 Facebook and 2 Instagram posts per the UWCA social media calendar. Staff also interacted with social media users to encourage further engagement. Most liked Facebook Post: "Volunteer tax assistance sites open today, February 1st. The Volunteer Income Tax Assistance (VITA) Program is a free tax preparation service for individuals and families in Santa Barbara County. Last year, our outstanding IRS-certified volunteer tax preparers helped prepare 2,100 tax returns, returning \$2.3 million in tax refunds to the community to help families build financial stability." Most liked Instagram post: "United Ways are kicking off VITA this year and helping hundreds of families claim the CalEITC. If you make less than 66k a year and need help filing your 2018 taxes, visit our website unitedwaysb.org/vita and find a VITA location". SAN LUIS OBISPO: NA. VENTURA: Facebook: 9 posts, 6 shares, 18 like, 1123 people reached, 3 links clicked. Most liked Facebook and Twitter post: "Last year, we brought back over \$1M in EITC returns through our #VITAsites...will you be part of that group this year? Find out if you're eligible! and #Dial211 for your #VITA appointment. https://bit.ly/1Q3vjAs". Twitter: 17 tweets, 6 likes, 5 retweets, 3460 impressions, 33 engagements. Instagram: 5 posts, 25 likes, most liked post: "Did you know there are 9 #VITA sites around Ventura County that can serve you? #Dial211 to make your appointment now! #CalEITC". WINE COUNTRY: There were 5 Facebook Posts, the most liked one was: "Am I eligible for #CalEITC even if I don't owe any income tax? YES and you don't have to pay to file. Visit http://bit.ly/2saruWJ." There were 7 Twitter tweets, the most liked one was: "Can you believe #tax season is here? New this year: you may be eligible for the cash-back credit CalEITC if you earned less than \$25,000. Many free tax prep assistance sites available throughout #CA. They are ready to help you! Find one to find out at https://t.co/4bE5ckAAok https://t.co/EpOyQtHZyn." There were 2 Instagram posts, the most liked one was: "Earned Income Tax Credit (EITC or EIC) is a benefit for working people with low to moderate income. To qualify, you must meet certain requirements & file a tax return, even if you don't owe any tax or are not required to file. See more http://ow.ly/hyk630nL5GI #FinancialStability". There was also a sponsored post which mentions CalEITC. NORTH COAST</p>	
Canvassing	

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1839
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	189
Office Visits	685

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 UWCA Staff Time & Benefits = \$3,977.22, Text Messaging Tools = \$916.66, Indirect = \$495.47 (Total = \$5,389.35); INLAND EMPIRE: NA, INLAND VALLEY: Staff Time: **\$500**, KERN: NA, invoice pending. MERCED: Staff Time: **\$368**, MONTEREY: NA. NORTHERN CALIFORNIA: NA. NORTHERN SANTA BARBARA: Staff Time: **\$154**. SANTA BARBARA: Staff Time: **\$1,700**. SAN LUIS OBISPO: NA

 Subtotal: \$8,111.35
- 2) Provide broad overview of canvassing for targeted zip codes:
 Canvassing was conducted in the following zip codes by the following subcontractors: INLAND EMPIRE: NA, INLAND VALLEY: 92563, KERN: 93301, 93304, 93306, 93309, 93305, and 93215. MERCED: 95333, 95340, 95341. MONTEREY: 93926 and 93930. NORTHERN CALIFORNIA: NA. NORTHERN SANTA BARBARA: 93454.
- 3) Provide a broad overview of canvassing for non-targeted zip codes: NA
- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
 No metrics to report this month. Continue to run our inbound/outbound text messaging pushes, will report in following months.
- 5) Provide broad overview of Phone Calls conducted: See below.
- 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	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

INLAND EMPIRE: 29 callers experiencing financial issues were informed about CalEITC and given a referral to the closest VITA office to assist them. INLAND VALLEY: 4 staff members visited 25 medical offices in the 92563 zip code to make presentations about EITC and CalEITC in Targeted Zip Code: 92563. KERN: Reached 1,439 clients through targeted canvassing in the following zip codes: 93301, 93304, 93306, 93309, 93305, and 93215. MERCED: Went to several community events in targeted zip codes: 95333, 95340, and 95341. MONTEREY: 200 were reached approximatley 200 people combined from the diffrent locations for the set of ladies for a total of 400 present and 200 reached. Paid out contract to BHC \$5,000.00 for Canvassing activities throughout the season Nov. 2018 - June, 2019. We will be reporting activities on a monthly basis. This set of ladies decided to make it more intimate and handed out (60) flyers in the fields in targeted zip codes 93926 and 93930 to co-workers some who ended up being relatives and neighbors 30-30 each. One of the ladies handed (37) flyers in the laundry matt in front of her apartment complex 20 of them were women and 17 males, she handed (31) flyers at the post office 17 males and 14 females. The last two flyers she had she handed to her cousins' daughters. Our second leader handed out 15 on a bingo night mixture of females and males sitting on her table, 15 at a babyshower all women, 10 at a church meting 7 females 3 males, and her last 30 at church after her daughters catechism class 20 mothers and 30 fathers. NORTHERN CALIFORNIA: NA.NORTHERN SANTA BARBARA: Attended the Healthy Food Pantry monthly gathering at the Veterans Center. Over 100 individuals asissted. They were there to get free healthy food plus information about community services. Also attended the Housing Authority monthly gathering at Evans Park. 25 individuals signed in to get information about VITA/CalEITC (attached). Most of the individuals were not aware that United Way provided free tax preparation and information about CalEITC. SANTA BARBARA: VITA Site Coordinators began work at their VITA sites. Site Coordinators were tasked with assisting with intake of clients, asking questions to help determine CalEITC eligibility, and distributing informational CalEITC4Me fliers to appropriate individuals. UWSBC participated in a CalEITC awareness event at Santa Barbara City College to help students and young adults claim the credit. UWSBC staff continued to field phone calls from individuals wanting to file their taxes. Staff reminded callers to learn more information about EITC through our website. With VITA sites open, Site Coordinators and greeters helped educate individuals about CalEITC and to remember to check their eligibility with fliers at the site and online at the UW website. Special emphasis was placed on the new updates for EITC eligibility to help maximize the number of clients receiving their credit. Community Impact Associate continued phoning community partners to coordinate EITC efforts and delivered three community presentations/distributions of materials for their clients at low-income apartment complexes. Calls and visits were also made to key community partners to ensure that they also would help drive clients to this year's VITA sites. Site schedules were left in their lobbies for their clients. Community partners will be receiving

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	1	4,593	1	
Paid Radio Ads	164		84	
Public Services Announcements (Radio)	27		25	
Paid Television Ads	8		17	
Public Services Announcements (T.V.)	9		17	
Billboards	1		1	
Transit Advertisements	20		20	
Internet/Website Ads				
Social Media Promoted/Boosted Ads	5	84,098		

Narrative of Expenditures in EARS and Outreach Activities

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

1) List the various activity-expenditures charging for this month and their cost:
 UWCA Staff Time & Benefits = \$1556.14, Indirect = \$495.47 Radio Ads = \$2,750, (Total = **\$4,801.61**);
 INLAND EMPIRE: NA, INLAND VALLEY: NA, KERN: Staff time: \$481.75, Mileage: \$161.71, Boosted
 Social Media: \$60, TOTAL: **\$703.46** MERCED: Staff Time: \$290, banner clips: \$34.42, TOTAL: **\$326.42**.
 MONTEREY: NA, pending. NORTHERN CALIFORNIA: NA. NORTHERN SANTA BARBARA:
 Social Media Ads :\$101.08, Printed Ad: \$250, TOTAL: **\$351.08**. SANTA BARBARA: NA. SAN LUIS
 OBISPO: NA VENTURA: NA WINE COUNTRY: Sponsored Social Media: \$635.54, Transit/Bus Ads -
 \$3,150, Radio Ads - \$3,256, TOTAL: **\$7041.54**

Subtotal: \$13,224.11

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: See below.

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:
 INLAND EMPIRE: NA, INLAND VALLEY: NA, KERN: Interview on CalEITC, EITC and VITA
 Univision Fresno Despierta Valle Central, which aired in Bakersfield on Thursday March, 28th. Still working
 on getting number of people reached. Will submit once we get it from Univision staff. 2 Boosted Social
 Media ads gathered 3,605 impressions. MERCED: They had a printed ad, Paid radio ad, public service radio
 ad, and billboard. The materials are in both English and Spanish. MONTEREY: Had 17 paid Spanish ads
 run, 25 English and Spanish radio PSAs, 8 English and 17 Spanish paid television ads. 8 English and 16
 SpanishTV PSAs, as well as 15 transit ads in English and Spanish. The TV ads ran on the following stations:
 KSMS, KDJT, KCBA and KSBW 8 NBC, KSBW Central Coast ABC AND Estrella TV. The Radio ads
 run on the following stations: KLOK-FM, KSES-FM, KWAV-FM. The TV ads ran on the following
 stations: KSMS, KDJT, KCBA and KSBW 8 NBC, KSBW Central Coast ABC AND Estrella TV. The
 Radio ads run on the following stations: KLOK-FM, KSES-FM, KWAV-FM. Please note about the older
 VITA PSA: During the month of February, the following VITA PSA ran in the above stations:
<https://youtu.be/LU6W2KWpKCg> In February we have a segment and CalEITC is mentioned. This new
 creative will be on air starting February. We have not recieved invoice as of yet. NORTHERN
 CALIFORNIA: Feb. 20: Partnering with the Franchise Tax Board's Jason Montiel , recorded a PSA
 interview with Steve Hafen - General Manager ay KVIP radio that has aired on Redding's 11:10-11:15 98.1
 FM, and at 1:00 pm on 540 am. NORTHERN SANTA BARBARA: Posted a Facebook Ad which ended on
 February 27th, which had 12,599 impressions (70% women, 30% men) with 103 link clicks. Posted an
 Instagram Ad which ended on February 1st, which had 585 impressions (46% women, 53% men) with 3 link
 clicks. Posted a Revista Okey Printed Ad from February 4th - March 4th that reached 4,593 individuals.
 SANTA BARBARA: NA. SAN LUIS OBISPO: NA. VENTURA: Our VITA program was featured on the
 front page of the Ventura County Star in an article discussing changes in the tax law for 2018
<https://www.vcstar.com/story/money/business/2019/02/07/free-income-tax-filing-help-ventura-county/2705700002/>. WINE COUNTRY: We have an English sponsored post with information about
 EKS, and it mentions CalEITC. This post reached 18,940 and made 67,309 impressions. We do not receive
 impression information on transit ads, however it was on 10 buses for the month of February. There was
 also 164 English paid radio ads, and 67 Spanish paid radio ads.

Collateral Messaging

Category	Metrics
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Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019
Number of Flyers/Brochures Distributed	9,135
Number of New Individuals who Received Direct Mailers	26,750

Narrative of Expenditures in EARS and Outreach Activities

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

UWCA Staff Time & Benefits = \$1,931.90, Indirect = \$495.47 Graphic Designer = \$640, Print & Digital Communications - Mailchimp = \$20.40, (Total = **\$3087.77**) INLAND EMPIRE: NA, INLAND VALLEY: Staff Time: **\$250**. KERN: Staff time: \$481.75, Mileage: \$62.10,, Fliers order: \$405.41, TOTAL: **\$949.26**. MERCED: Staff Time: \$290, printing costs: \$87.50, TOTAL: **\$377.50** MONTEREY: NA. NORTHERN CALIFORNIA: Printing Flyers: \$50. NORTHERN SANTA BARBARA: Staff Time: \$266, Content Production: \$250, TOTAL: **\$512**. SANTA BARBARA: Printing Costs: **\$300**. SAN LUIS OBISPO: NA. VENTURA: NA. WINE COUNTRY: Staff Time: **\$333.60**. NORTH COAST OPPORTUNITIES: Printing Costs: **\$125**

Subtotal: \$5,985.13

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

United Ways of California has been working to develop, print and distribute CalEITC postcards.

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

INLAND EMPIRE: NA, INLAND VALLEY: NA, KERN: Assemblyman Rudy Salas's staff sent out 26,750 mailers this month, inviting constituents to VITA workshops on March 10th, 29th, and 30th. MERCED: NA. MONTEREY: NA. NORTHERN CALIFORNIA: NA. SANTA BARBARA: NA

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

INLAND EMPIRE: 60 flyers were distributed that were provided by UWCA. INLAND VALLEY: 1,500 Flyers were distributed to individuals at various events throughout the service area. Chamber events, United Way campaign events, and health fairs were included. KERN: Distributed 4,650 fliers to UPS, FAFSA workshop at KHSD, Kern Medical Center, Alta One Credit Union, Cal State University of Bakersfield (Migrant Parent Conference), Vision y Compromiso, Lost Hills Park and Rec, and Madison Low Income Housing Apartments.

MERCED: They distributed 500 flyers. MONTEREY: They distributed 400 flyers. NORTHERN CALIFORNIA: 2/7/2019 Woodland's Open House Event- Passed out 50 Cal EITC brochures. NORTHERN SANTA BARBARA: Inserted 250 flyers into tax envelopes at the VITA sites. SANTA BARBARA: 1,625 flyers and posters were distributed to all VITA sites, as well as dozens of community partners serving target populations to drive attendance to VITA and to raise awareness of EITC. SAN LUIS OBISPO: NA, VENTURA: NA, WINE COUNTRY: 300+ flyers distributed. Various staff have shared information with local businesses by email including flyers which could be printed and banner ads to use on their intranet. We are encouraging them to share broadly with employees or anyone who may qualify for the program. NORTH COAST OPPORTUNITIES: Printed CalEITC4Me materials to distribute at VITA tax preparation sites.

Group Events

Target Area	15-Statewide			
Reporting Period	February 1, 2019 - February 28, 2019			
Total Number of Events Held During the Reporting Period			37	
Location	Zip Code	Date	Attendance	Press at Event?
School	92407	02/13/19	150	No
Educational Forum	92563	02/07/19	25	no
Educational Forum	92501	02/14/19	250	no
Educational Forum	92553	02/20/19	150	no
Educational Forum	92555	02/27/19	200	no
Educational Forum	92563	02/22/19	15	no
Free Tax Prep	93307	02/01/19	41	No
Educational Forum	93309	02/02/19	250	Yes
Free Tax Prep	93263	02/04/19	50	No
School	93306	02/07/19	125	No
Free Tax Prep	93215	02/11/19	20	No
Free Tax Prep	93241	02/15/19	45	No
Library	93309	02/08/19	15	No
Community Gathering	95341	02/05/19	10	NO
Resource Fair	95340	02/13/19	15	NO
Community Gathering	95341	02/25/19	25	NO
King City	93930	2.23.19	65	no
King City	93930	2.24.19	60	no
King City	93930	2.26.19	40	no
City of Gonzales	93926	2.23.19	80	no
City of Gonzales	93926	2.24.19	60	no
City of Gonzales	93926	2.24.19	45	no
City of Gonzales	93926	2.25.19	50	no
Narrative of Expenditures in EARS and Outreach Activities				
1) List the various activity expenditures occurring for this month and their cost.				

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

1) List the various activity-expenditures charging for this month and their cost:
 UWCA Staff Time & Benefits = \$1,250.59, Indirect = \$495.47 (Total =**\$1,746.06**); INLAND EMPIRE: NA, INLAND VALLEY: Staff Time: **\$350**. KERN: Staff Time: **\$481.75**. MERCED: Staff Time: **\$725**. MONTEREY: NA. NORTHERN CALIFORNIA: NA. NORTH COAST OPPORTUNITIES: Staff Time: **\$1,298**.

Subtotal: \$4,600.81

2) Provide a brief overview of events conducted during the reporting period:
 United Ways of California has met with different state partners to discuss new expansion eligibility including Horizontal Integration groups.

3) If members of the press attended an event, indicate which press outlets:
 INLAND EMPIRE: NA, INLAND VALLEY: NA, KERN: KBAK, KGET, and Telemundo were present at the educational forum held on 2/2/2019. MERCED: NA, MONTEREY: NA. NORTHERN CALIFORNIA: NA.

4) Any other additional information pertinent to work conducted, including leveraging of other resources:
 INLAND EMPIRE: College job fair/ Internship fair in which students were also informed of CalEITC, if student qualified. Letting college students know about CalEITC and if they needed resource location for tax assistance to contact 211. INLAND VALLEY: Presented at five educational forums totaling 640 community members in attendance. KERN: Visited a total of 11 events: four Free tax prep sites at community college sites in Bakersfield and Delano. Other free tax prep sites include: City of Shafter Veteran's Hall, Self Help Bank, Arvin Family Resource Center, East Bakersfield HS, Buttonwillow FRC, Kern County Libraries, and Beneficial State Bank. MERCED: They are trying to purchase a table cloth with " It's Your Money Get IT!" (English and Spanish with Live United in the middle of both). They attended three events with 50 community members present. MONTEREY: Attended 7 events with 400 total participants. NORTHERN CALIFORNIA: NA. NORTH COAST OPPORTUNITIES: Group events were held at: NCO Governing Board Meeting, NCO Leadership Meeting, Healthcare Coalition Meeting, Mendocino County Office of Education, Senior Corp Program In-service and Advisory Councils, City of Ukiah Community Meeting, Willits Senior Center, Ukiah Senior Center, Project Sanctuary, Soroptimist of Ukiah. 20 VITA volunteers trained in CalEITC eligibility and resources recipients are eligible to receive. They are able to explain the advantages of filing a tax return and the possibility of receiving Cal EITC . Save your refund-type flyers are provided to CalEITC recipients.

Other

Category	Actual (#)
211 Hold Message	6088

Narrative of Expenditures in EARS and Outreach Activities

Expenditures: UWCA: Indirect costs totalling \$495.47 for 211 Hold Message (OTHER 1) and Indirect

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019
<p>costs totalling \$495.47 for DMV Ads (Other 2), Movie Theater Ads = \$12925.00 (Total = \$13915.94) INLAND EMPIRE: No expenditures.</p> <p>Subtotal: \$13,915.94</p> <p>ACTIVITIES: INLAND EMPIRE: 6,088 hold messages.</p> <p>UWCA has been working with Motor Vehicle Network to produce ad copy and get placement on local Dept Motor Vehicle locations. Also worked to research and place movie theatre ads in strategic locations like Bakersfield, and Merced.</p>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

NORTHERN SANTA BARBARA: Documenting client stories and taking pictures.

Narrative of Success Stories

Success Story #1

Date of Success Story: **2/06/19**

Name of Person from Success Story: **Jose and Elizabeth Torres**

Zip-Code Where Person Lives: **93307**

VITA Site where person got taxes done (if applicable): **VIDA Scott Center**

Narrative: **Thanks to CalEITC, the Torres Family was able to receive the maximum amount in their tax refund!**

Liability waiver signed? YES

Success Story #2

Date of Success Story: **02/21/19**

Name of Person from Success Story: **Sara Rodier**

Zip-Code Where Person Lives: **93305**

VITA Site where person got taxes done (if applicable): **Bakersfield College**

Narrative: **I was stressed about having to get my taxes done but i saw a flier at school so I called to make an appointment. Was very satisfied with the service received and the knowledge of the tax preparer. Surprised to learn about EITC and CalEITC and was happy to have qualified for both credits.**

Liability waiver signed? YES

Success Story #3

Date of Success Story: **2/20/19**

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

Name of Person from Success Story: **Kia Jackson**

Zip-Code Where Person Lives:

VITA Site where person got taxes done (if applicable): **KC Library**

Narrative: **I received a flier in the mail through an organization, MAOF. My experience here was awesome. Everyone is incredibly friendly and great customer service. Jackie prepared my taxes and I am so grateful for her services. I had not heard of CalEITC before today. I was happy to get it and I will spend it wisely. It's an incredible blessing.**

Liability waiver signed? **YES**

Success Story #4

Date of Success Story: **2/9/19**

Name of Person from Success Story: **Erika**

Zip-Code Where Person Lives: **93444**

VITA Site where person got taxes done (if applicable): **SM AHC**

Narrative: **First time at our VITA Site. Erika said this was a better experience than last year. Preparers were friendly and resourceful. VITA allows them to have more money to utilize to pay off their debt, especially their medical bills because they have a daughter with heart problems and it has been very difficult for them.**

Liability waiver signed? **NO**

Success Story #5

Date of Success Story: **February 2nd, 2019**

Name of Person from Success Story: **Laura Valdez**

Zip-Code Where Person Lives: **95407**

VITA Site where person got taxes done (if applicable): **Empire College**

Narrative:

Laura Valdez, 30-year old single mother of 4 boys ages 7,5,2 and 1, made only \$3,935 in 2018 after having to stay home while her youngest needed to have 3 back -to- back surgeries for Pylorax stenosis. She is passionate about working in the senior living facility in the memory loss department as a dietary clerk and says "it's easy to feel like your problems don't matter as much when you see some of the sadness, but also bittersweet joys, of the people she cares for daily." She has to move the whole family soon as her own father has just gone onto permanent disability 2 hours away and he'll need her care as well. Her total Federal and state tax refund combined was \$3,677, almost equal to her total income for the whole year! She had gone to H&R Block in the past and the person who was assisting her said rudely "*maybe you want to tell the truth to the government about how you are supporting 4 kids on that income...*" She felt traumatized and embarrassed and walked out after hearing how much they'd charge her tax return. She remarked on how kind our volunteer preparers were. It surprised her and it mattered. **Of Laura's total refund, 45 % (\$1,766) of it was due to the Federal EITC and 38 % of it (\$1,502) was from the newly expanded CalEITC! So of her total refund, more than 83% was due to these life changing EITC refundable credits!** She's deeply relieved she will be able to fix her failing car, pay some back bills and *mostly* be able to repay monies borrowed from people who helped her in hard times this past year.

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019
<p>Liability waiver signed? Yes</p> <p>Success Story #6</p> <p>Date of Success Story: Feb 15th, 2019</p> <p>Name of Person from Success Story: Irene Guitierrez Alba</p> <p>Zip-Code Where Person Lives: 95407</p> <p>VITA Site where person got taxes done (if applicable): Empire College</p> <p>Narrative:</p> <p>Irene Guitierrez Alba , 28 year old single mom of a 10 year old, a 3 year old and a 2 month old, worked hard as a vineyard worker harvesting grapes in Santa Rosa. She is originally from Michuacaun and is currently of DACA status,In 2018, she made \$17,322 and at our tax site flashed a relieved and happy smile as our volunteers showed her how she got a total refund of \$9,815! Her federal EIC was \$6431 and her CalEITC was \$185. She told us that this time of year is always such a relief to her as she looks at daycare costs so she can work, but mostly knowing that when the kids head back to school they will be able to go prepared to succeed with school supplies and field trip monies, clothes, food, etc.</p> <p>Liability waiver signed? Yes</p> <p>Success Story #7</p> <p>Date of Success Story: February 20th, 2019</p> <p>Name of Person from Success Story: Ashley Sims</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable): Empire College</p> <p>Narrative:</p> <p>Ashley Simms, 37-year old single mom of two girls ages 11 and 13, is currently in the nursing program at SSU after making only \$7,487 as a part time cook at Whole Foods in 2018. She had to quit her job to take an unpaid internship at Advent Health in Ukiah making everything very hard financially. With her Federal EITC refund of \$2,990 and her CALEITC refund of \$2542, along with her child tax credit of \$748, she was going to be able to give half of it to her grandpa she and the kids live with and who helped her with the kids so she could even go to school to pursue her dream. With the other half, she is saving to move into her own place with the kids someday, anticipating how costly first,last,and deposit can be in Sonoma County , especially post fires. Last year she spent over \$300 to get her taxes prepared and was very grateful.</p> <p>Liability waiver signed? Yes</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-8017
Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	71,120

Narrative of Expenditures in EARS and Outreach Activities

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

Website Updates and Management: \$4,500 (GSO Staff Salary)

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

Most of the website changes have been completed by January. However, there have been a few updates that have been made in February that include:

- New homepage rotationals
- Creation of clone pages to send specific links to different outreach tactics. Our texting program, mail program will use clone pages of the Earn-it and Get-it pages to track the effectiveness of the outreach tactic, and see how much web traffic is generated
- Updates to partner page
 - Including ways to become a partner:
 - Post on social media
 - Sharing CalEITC4Me on your newsletter or email
 - Co-host a roundtable
 - Co-host a workshop

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	February 1, 2019 - February 28, 2019

We have also pulled additional web analytics to see where the traffic comes from. Below are a few examples

Top 10 Visits based on Location (City)

- Los Angeles: 16% of website visits
- Sacramento: 6% of website visits
- San Diego: 6% of website visits
- San Francisco: 6% of website visits
- Fresno: 4% of website visits
- San Jose: 3% of website visits
- Riverside: 2% of website visits
- Bakersfield: 2% of website visits
- Oakland: 1.5% of website visits
- San Bernardino: 1% of website visits

Website Referral (Where visitors are coming from)

- Facebook: 88% of page views
- Instagram: 5% of page views
- Twitter: 6% of page views

Device

- Mobile: 62% of users
- Desktop: 32% of users
- Tablet: 6% of users

Social Media

Number of Facebook Posts	47	Number of Tweets	43
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
ICYMI: For the first time this year young people 18 to 24 and older adults over 65 are eligible for the #CalEITC cash back refund on their taxes. BUT you have to file an income tax return to get your money! Check our our website to see if you qualify and find FREE tax prep services near you: https://caleitc4me.org/earn-it/		Are you eligible for the #CalEITC or the federal #EITC Make sure you find out, or you could be leaving \$\$ on the table: https://caleitc4me.org/earn-it/ #taxes2019 #TaxSeason	
Number of Other Posts (Instagram, etc.)	17	Exact Messaging of Most-Liked "Other" Post	
		Did you know that in 2019 Californians workers aged 18-24 and over the age of 65 are now eligible to receive the Cal EITC?	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

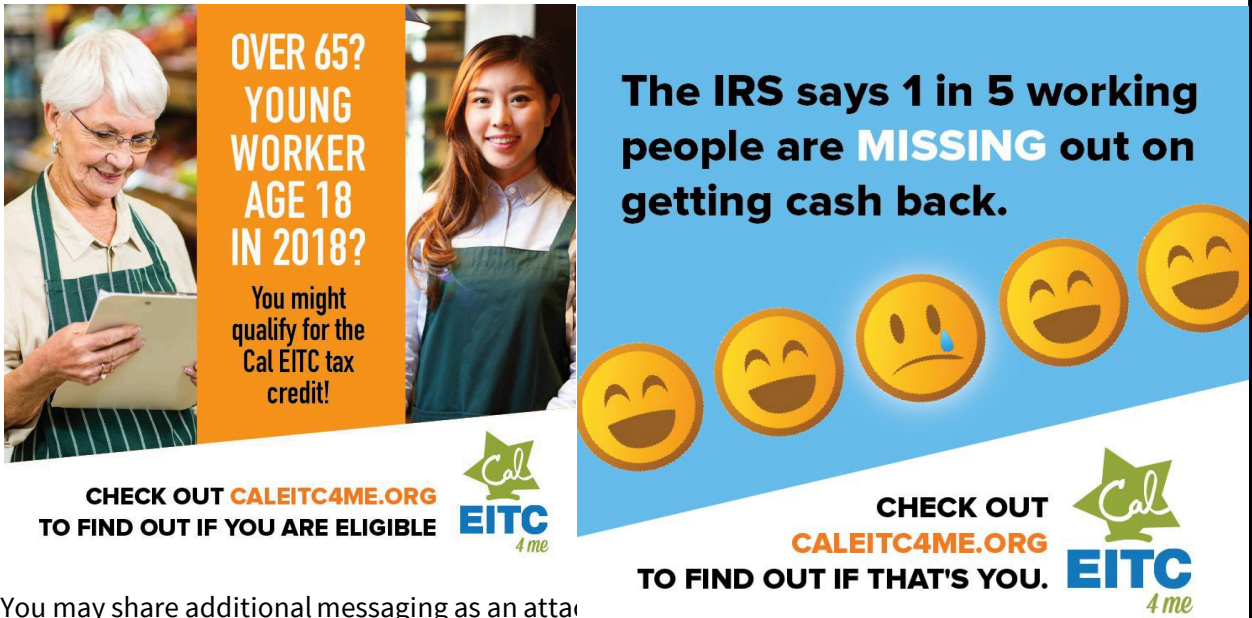
1) List the various activity-expenditures charging for this month and their cost:

Social Media Content Development: \$6,422 (Staff Salary, includes time for create content, create graphics, partner engagement, and translations)

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

GSO has hired a social media manager to focus on social media content creation, ensuring to tag partners and grow organic reach of our posts. Social media manager has also spent time creating many graphics to go along with the posts. Our posts are much more successful if we have graphics to go along with a post.

Here are the graphics to go along our most successful posts mentioned above:



3) You may share additional messaging as an attachment if required. Also indicate any leveraging of other resources or social media:

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	33,356

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

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: \$4,500 (GSO Staff time \$75/H for 60 Hours)

Note: Hard costs for texting have been pre-paid to cover all texts for grant period. All texting costs going forward are for time to send out texts, manage texting volunteers, create reports, and make adjustments to program.

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:

As of February, we have sent 33,356 texts to our statewide counties. These counties are ones that fall outside of the targeted regions that receive grants. These counties include: Monterey, Merced, Imperial, Marin, Napa, Placer, San Luis Obispo, Santa Cruz, Shasta, Solano and Yolo

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:

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				

Target Area	15-Statewide			
Reporting Period	February 1, 2019 - February 28, 2019			
Internet/Website Ads				
Social Media Promoted/Boosted Ads	6	303,821	0	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
Facebook Ads: \$25,500 (Payment sent to Signified Media Group to run Ads, not all spent yet, but will cover duration of Ads running)
Consultant Monthly Retainer: \$1,125
Social Media Total: 26,625

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:

Please see attached PDF of the type of Ads being ran.

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:

Collateral Messaging	
Category	Metrics
Number of Flyers/Brochures Distributed	81,000

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019
Number of New Individuals who Received Direct Mailers	10,000
Narrative of Expenditures in EARS and Outreach Activities	
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Direct Mail Program: 5,340.29 No costs for flyers distributed as they were provided at no cost by the Franchise Tax Board.</p> <p>However, we will be sending CalEITC4Me collateral pieces to 114 community colleges throughout the state.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution:</p> <p>FTB Materials that have been distributed at events and to partners throughout the state</p> <p>English Brochure: 30,000 Spanish brochure: 30,000 English poster: 2,000 Spanish Poster: 2,000 English/Spanish Postcard: 10,000 Korean: 2,000 Mandarin: 2,000 Vietnamese: 2,000 Russian: 1,000</p> <p>3) Provide a listing and narrative of direct mailers that went out:</p> <p>10,000 pieces of direct mail sent to contacts across the Bay Area. Same contacts that will also be receiving a text message.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources:</p>	
Group Events	
Total Number of Events Held During the Reporting Period	1

Target Area	15-Statewide			
Reporting Period	February 1, 2019 - February 28, 2019			
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	93109	02/22/19	50	Yes

Narrative of Expenditures in EARS and Outreach Activities

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

No Expenses for this event. This was our Youth launch event at a student resource fair at Santa Barbara city college with their local food pantry. Our communications manager worked to put this press event on and confirmed the three local news outlets to attend and cover the event. There were also local elected officials Senator Hannah Beth Jackson and Assemblymember Monique Lemon.

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

GSO held a Youth Launch event at Santa Barbar City College to promote the newly eligible population.

3) If members of the press attended an event, indicate which press outlets: KYET News, Noozhawk, SBCC Student paper.

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

KYET News; Click link to view video

<https://www.keyt.com/news/money/cash-back-for-low-income-workers-explained-at-sbcc/1035496605>

Noozhawk

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

https://www.noozhawk.com/article/california_earned_income_tax_credit_campaign_for_young_adults_20190224

Santa Barbara City College student paper.

<https://www.thechannels.org/features/2019/02/23/caleitc4me-aims-to-help-students-with-financial-struggles/>

Other

Category	Actual (#)
Texting Training	3
Partner Webinar	1

Narrative of Expenditures in EARS and Outreach Activities

Texting Training and Partner Webinars: \$5,000

GSO held three texting trainings in February. GSO trained partners and part-time staffers to help send out texts for the rest of tax season.

GSO also held a partner webinar on February first to discuss upcoming events and available collateral. We are planning to held a webinar every first friday of every month going forward. The next webinar will be a statewide texting training.

Other 2: GSO Admin - \$3,578

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

This year is more difficult getting materials out initially, FTB providing their materials at no cost has made other grantees less in need for CalEITC4Me materials. We are overcoming this challenge by partnering with state agencies and community colleges and will be sending large scale material orders in March.

Narrative of Success Stories

Success Story #1
 Date of Success Story: February 22, 2019
 Name of Person from Success Story: Saya
 Zip-Code Where Person Lives: Not Sure, Met at Santa Barbara City College
 VITA Site where person got taxes done (if applicable): N/A
 Narrative: Saya is a student at SBCC and was at our youth launch event to promote the newly eligible population. Please see link to video on our twitter account to see her story.

<https://twitter.com/CalEITC4Me/status/1099052836158038016>

Target Area	15-Statewide
Reporting Period	February 1, 2019 - February 28, 2019

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	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

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:

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

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.)		Exact Messaging of Most-Liked "Other" Post	
N/A		N/A	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

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 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:

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	45,000
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 Organizers: \$1,500
Texting Management: \$2,375
Canvassing Total: \$3,875

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	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

Total number of texts sent to Riverside county contacts: 45,000. Since our texting program is testing out 4 different message groups for effectiveness, we do not currently know how many texts per Rural county because our list was randomized for the test. We will have that data after April 15 and this test ends.

Treatment 1: Basic Informational Message + Link

Hi-this is _____ 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 Visit caleitc4me.org/CashBack to learn more about your eligibility and to claim your EITC refund.

Treatment 2: Promote Hotline

Hi-this is _____, 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. Call 211 to get free help with filing your return and to claim your EITC refund.

Treatment 3: Offer Text-based Assistance

Hi-this is _____ 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. Text "yes" and I can help you claim your EITC refund.

Treatment 4: Benefit Value

Hi-this is _____, 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. Eligible families got back an average of \$2,000 last year. Text "yes" and I can help you claim your EITC refund.

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:

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads				

Target Area	14-Rural			
Reporting Period	February 1, 2019 - February 28, 2019			
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads	6	77189	0	0

Narrative of Expenditures in EARS and Outreach Activities

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

Facebook Ads: \$17,000 (Please note this was upfront payment to cover all Ads throughout the grant period, not the amount spent for 6 ads above.)

Consultant Monthly Retainer: \$750 (Please note that our consultant monthly retainer is \$7,500 split between all 8 GSO grants, including FTPA) We have broken down the costs by region.

GSO Staff: \$4,125 (cost includes GSO staff time to work on Facebook Ad plan, including working with consultant Signified media group on messaging and content. Also includes time to pull Ad report to gauge effectiveness of ads, and determine which ads to put more focus on for the remainder of the grant.)

Total 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:

Please see attached PDF for example of the Ads. Note: The Ads are the same for all regions but the amount of funding going in per region will change, also we are targeting the newly eligible population, and general eligible population with different 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:

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

Target Area	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

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:
- 2) Provide a broad overview of flyer/brochure and poster distribution:
- 3) Provide a listing and narrative of direct mailers that went out:
- 4) Any other additional information pertinent to work conducted including leveraging of other resources:

Target Area	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

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:
- 2) Provide a brief overview of events conducted during the reporting period:
- 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	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

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Other	
Category	Actual (#)
Admin	

Narrative of Expenditures in EARS and Outreach Activities
<p>GSO Admin Costs: GSO Admin Costs: \$625 (GSO Staff time to support Rural grant, includes time to complete progress reports, attend SIT meeting/coordination calls, and planning discussions with co-grantee ATCAA.</p>

Target Area	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

A big challenge has been getting materials to spreadout Rural Partners. We will overcome this by getting CalEITC4Me collateral distributed during March, last tax season push and post-tax day outreach.

Narrative of Success Stories

No Success stories to report at this time.

Target Area	14-Rural
Reporting Period	February 1, 2019 - February 28, 2019
No Success stories to report at this time.	

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Amador Tuolumne Community Action Agency
Grantee Representative	
Telephone Number	
Email Address	
Contract Number	
Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	342

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Occupancy costs for web research/design staff/office: \$73.36,
 Web partnering research and web ad design staff: \$142.46,
 Bilingual messaging staff, \$103.78,
 Total: \$319.60

2) Provide a narrative of education and outreach activities conducted during the month under web:
 Provided web content to established and potential partners for posting to their sites. Updated content on ATCAA.org/eitc specific 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: None

Of note: Due to ATCAA's foothill service area and the geographic range of the rural areas, ATCAA maintains a CalEITC page on it's ATCAA website for those within ATCAA's service area. Additionally, it maintains a mycaleitc.org website that is essentially a landing page that directs folks to the caleitc4me.org site. The landing page was created in 2017 to direct visitors that reside outside of ATCAA's service area from social media and other sources to a site that was not regionally specific.

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

Social Media

Number of Facebook Posts	202*	Number of Tweets	7
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
¿Sabias que #ramitas_trabajadoras pueden ser elegibles para recibir cienos o miles de dolares extra esta temporada de impuestos? Visite mycaleitc.org para ver si califica y donde puede declarar sus		Thank you #VITA volunteers from @UWCCR for hopping on the e-bus and preparing taxes for our foothill clients. Next stop- #Sonora. Get your taxes done free and learn about #CalEITC at the Junction Shopping Center in Sonora on 2/28 &	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
17		atcaasince1981 Hop on the #FreeTaxPrep e-bus in #Jackson today or tomorrow in front of #CVS to get your taxes done free and learn about #CalEITC at 515 S Hwy 49. Call our Taxline at 209-	

Narrative of Expenditures in EARS and Outreach Activities

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

Social media development staff: \$279.69
 Social media design/development: \$323.50
 Occupancy costs for social media staffing: \$113.69,
 Total: \$716.88

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 The mycaleitc FB page, created to outreach to rural California resident's outside of ATCAA's service area has become an excellent Spanish platform and we'll continue to message as such. Focus in February to find trusted social media partners to help us spread the message.

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: Developing relationships with influencers in various regions. Providing to them info and links to info as well as providing them content based on thier recommendations and our knowledge of the CalEITC.

*13 posts on mycaleitc FB page, 5 posts on ATCAA FB page, 184 posts into FB discussion groups and message boards = 202 posts.

Impressions for February as per CSD Reporting Media Guidelines
 Facebook: Impressions: 39,153 Engagement: 1,687
 Twitter: Impressions: 4,003 Engagement: 42
 Instagram: Impression: 703 Engagement: 17
 You Tube (views): 19

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	512
Canvassing in Non-Targeted Zip Codes	N/A
New Individuals Who Received Text Messages	N/A
Phone Calls	N/A - See Other
Office Visits	N/A - See Other

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Bilingual outreach staff: \$146.53,
 Mileage vehicle costs for outreach staff for meetings/training & outreach: \$212.52,
 Occupancy costs for outreach staff: \$84.98,
 Total: \$444.03

2) Provide broad overview of canvassing for targeted zip codes: As outlined in Spcope of work, limited canvassing is being done within our own service area. Phone calls and office visits to business and organization canvassing is reported under "Other." Zip codes cavassed: 95247, 95222, 95223, 95221, 95224, 95226,95228, 95229, 95248,95249, 95252,95255,95257.

3) Provide a broad overview of canvassing for non-targeted zip codes:
 Canvassing in non-targeted zip codes is canvassing to established and potential partner organizations and businesses throughout the northern California rural county region. See Other.

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

businesses throughout the northern California rural county region. See Other.

- 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. The phone calls we conduct are to potential partner agencies, listed in Other 2, rather than to individuals.
- 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: Partnering with staff at Food Banks, Head Start Centers and faith-based organizations resulted in those organizations canvassing in their neighborhoods on our behalf. Promotora canvassed with our literature canvassed in Amador, Calaveras and Tuolumne counties.

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	12	26,062	0	
Paid Radio Ads	60	20,022	0	
Public Services Announcements (Radio)	30	9,800	0	
Paid Television Ads	0		0	
Public Services Announcements (T.V.)	0		0	
Billboards	0		0	
Transit Advertisements	0		0	
Internet/Website Ads	2	34,770	0	
Social Media Promoted/Boosted Ads	4	23,560	4	15,043

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: \$994.10
 Bilingual media ad design/messaging and placement staff: \$779.69,
 Paid ad placement: \$6,665.54
 Occupancy costs for Media staffing: \$442.67
 Total: \$2,380.82
- 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: Print and digital ads ran in MyMotherlode.com, Leger Dispatch, Pinetree.net and Amador Community News. Radio ads on KVML, KKBN, KZSQ, KVCG. Set up contract Spanish radio ad, 30 minute inerview and PSAs to begin March. Ran geo-targed ads on Facebook.
- 3) Provide information on whether or not anv earned media obtained during the month. For each earned

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019
<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: Earned media on Mymotherlode and KVML/KZSQ. Same ad as last month.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: Paid radio spot led to offer of 30-minute interview to discuss CalEITC on Spanish radio scheduled for March.</p> <p>Other: Contacted Spanish radio station with coverage in Butte, Colusa, Glenn, Sutter, and Yuba counties, created an email template for contacting other sopenish radio stations.</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	6,672
Number of New Individuals who Received Direct Mailers	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>Copying charges: \$52.50, Office Supplies, \$3.58, Occupancy costs: \$260.78, Design staff: \$1,112.46, Bilingual design/messaging staff: \$279.69,</p>

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019
<p>Printing Costs: 459.60 Total: \$2,168.61</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: Combination of posters and flyers hung. Distributed FTB brochures, in-house-CSD approved postcards, flyers and business card sized messaging. Areas distributed were El Dorado, Tuolumne, Calaveras, Amador, Sutter and Yuba counties. Began preliminary planning of north coast tour scheduled for March.</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: Mailed out packages of flyers, posters, and customized letters to partner organizations in Humboldt and Siskiyou counties, and additional materials to partner clinics and community resource centers in Sutter County. Created personalized letters to new organizations that have agreed to partner with CalEITC. Created letter personalized for parents that are attached to brochures to be used by partners with WIC or backpack programs, packaged deliveries for partner organizations in Humboldt, Siskiyou, and Sutter counties. Created list of contact list of financial aid offices of community colleges in target counties, contacted 12 community colleges, contacted 6 food banks, continued planning outreach for canvassing/outreach in El Dorado county. Collateral distributed in February was 4:1 English/Spanish.</p>	

Group Events				
Total Number of Events Held During the Reporting Period			7	
Location	Zip Code	Date	Attendance	Press at Event?
Food Bank	95642	02/06/19	60	No
Free Tax Prep	95642	02/26/19	40	No
Free Tax Prep	95642	02/27/19	40	No
Library	95370	02/11/19	40	No
Food Bank	95379	02/19/19	30	No

Target Area				
Reporting Period	February 1, 2019 - February 28, 2019			
Free Tax Prep	95370	02/28/19	60	No
Free Tax Prep	95370	03/01/19	80	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Staffing and travel costs related to participating in, establishing events/creating and maintaining events and calendar; \$538.53
 Bilingual staffing and research: \$279.69,
 Occupancy costs: \$137.99
 Total: \$956.21

2) Provide a brief overview of events conducted during the reporting period: Set up info area at food distribution days in Tuolumne and Amador counties. Set up info area outside of Sonora library. Free taxes prep e-bus and CalEITC outreaceach at shopping centers for 2 days in Jackson and 2 days in Sonora.

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: Researched and secured space at year-round farmers markets in select counties. Added to calendar additional locations/events to set-up mini outreach booths.

Other

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019
Category	Actual (#)
Canvass to Businesses	94
Canvass to Potential Partners	192

Narrative of Expenditures in EARS and Outreach Activities

OTHER 1- CANVASS TO REGIONAL BUSINESSES.

Travel & Mileage Reimbursement: \$252.51,
Occupancy costs for staffing: \$158.81,
Staffing needed to research, develop and maintain business and partner lists, communicate and strategize needs including data collecting methods: \$559.38,
Bilingual Outreach Staffing: \$190.68,
Total OTHER 1 : \$1161.38

OTHER 2 - CANVASSING TO REGIONAL PARTNERS.

CommuniTravel & Mileage Reimbursement: \$211.51,
Equipment, supplies: \$3.28,
Vehicle Costs: \$57.23,
Occupancy costs for canvassing support staff: \$211.17,
Canvassing support, research data collection staff, \$634.44,
Bilingual research and canvassing support staff, \$559.38
Total OTHER 2: \$1,677.01

Targeted businesses and potential partners in Colusa, Amador, Calaveras, El Dorado and Tuolumne Counties posting and delivering information to businesses and organizations in all above counties. Created email template for contacting community colleges in target counties, created food bank email/contact template, contacted Colusa Campus of Woodland College, Started creating contact list of VITA sites in target counties, continued researching potential partners in El Dorado County, Created contact list of financial aid offices of community colleges in target counties, contacted 12 community colleges, contacted 6 food banks, continued planning outreach for canvassing. Partnered with 15 organizations (5 thrift/discount stores, 5 nonprofits, 2 college/schools, 1 faith-based organization, 1 clinic, and 1 library). Contaced and planned with communications director at health clinic in El Dorado County about distributing CalEITC materials, contacted food bank in El Dorado County, emailed again to outreach coordinator of health clinic in Yuba/Butte/Sutter/Glenn/Colusa counties.

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 parterships by beginning the dialogue in person.

We found that organizations and businesses we contacted last year, were this year, ready and willing partners. Many still had info from last year and were more than willing to help us get the word out.

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

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Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Weather.

Narrative of Success Stories

<p>Success Story #1 None 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 None 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 None 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>

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	CAC of Santa Barbara
Grantee Representative	Kemba Lawrence
Telephone Number	
Email Address	Klawrence@cacsb.com
Contract Number	18T-8014
Target Area	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019

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:

Community Service Director Salary **\$138. 81** Program oversight
 211 Program Manager **\$1123.45** Provided update content verification for web designer gathered data for reporting from website contractor

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

Website has texting option prompt at the opening of site. Also updated link to Calculator and 2018 program information(frequently asked questions section)
 Posted new video link for self-employed audience from CAL EITC website
 Update VITA location sites link

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

Number of Facebook Posts	Number of Tweets
Exact Messaging of Most-Liked Facebook Post	Exact Messaging of Most-Favorited Twitter Post

Target Area	13-Ventua/Santa Barbara	
Reporting Period	March 1, 2019 - March 31, 2019	
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: CAC Program Manager \$138.81 Program oversight CAC Social media staff \$286.72 create content for post tracking and reporting \$130 FB Boosting Ventura Program manager and social media staff \$1,134.05 Outreach sub contractor \$540</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media:</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under 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:</p> <p>Post had a total reach of and an engagement of</p>		
Canvassing		

Target Area	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019
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

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

CACSB Program Manager **\$138.81** Program oversight and contractor training and webinar participation
 211 Program Manger **\$1123.45** Content revision for pust to text campaign. Condcuted contractor meetings regarding data collection and confidentiality information used for tracking
 Web page maintenance **\$2,625**
 Outreach Contractor **\$550**

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

Outreach contractor added EITC program information to their outreach events. Staff were dispursed into 9 location throughout the count and enrolled clients in text message campaign at food banks, health screenings and through one on one interactions

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

Non targeted zips were incorporated in the above method. Most of the events had been scheduled prior to the campaign and included non-targeted zips

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:

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads				

Target Area	13-Ventua/Santa Barbara			
Reporting Period	March 1, 2019 - March 31, 2019			
Public Services Announcements (Radio)				
Paid Television Ads	39	3,101		
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 Program Manager **\$143.81** program oversight
 Outreach Contractor **\$320** scheduling and conducting interviews Radio La Rey and KZZAA 96.5 Spanish station
 KEYT Broad casting **\$1295**
- 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	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	251
Number of New Individuals who Received Direct Mailers	19,391

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
CAC Manager **\$143.81** Coordinated content and revision for mailer
CAC Venturea **\$482.24** Front desk staff distribution of collateral and sign in sheet collection
Mail Services post cards **\$5950**
Printing of flyers **\$2548**
Promotoras Outreach Contractor **\$550**

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

Flyers were distributed at group events and to clients that were intersted in text messaging and wanted to follow up later. Front desk staff are logging the data from the sign in sheets and providing collateral to all clients being served. Collateral is also being inserted in to all mailed applications for the Energy Services applications from Santa Barabara. Totals will be added to March numbers

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

Clients were identified as living in target zips with an annuail incom eof \$50,000 or less. List attached.

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

Target Area	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019

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Group Events

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

Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	93101	02/16/19	8	No
Community Gathering	93117	02/22/19	11	No
Health Care Clinic	93117	02/25/19	14	No
Food Bank	93117	02/26/19	78	No
Church	93105	02/28/19	12	No
Food Bank	93436	02/27/19	55	No
Educational Forum	93434	02/19/19	13	No
Food Bank	93458	02/19/19	20	No

Narrative of Expenditures in EARS and Outreach Activities

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

CAC Program Manager **\$143.82** Program oversight
CAC Staff translation at event **\$34.37**
CAC Ventura Staff scheduling **\$190.37**
Outreach Contractor **\$600**

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

Provided one on education and literature distribution to clients at local food banks in Isla Vista, with heavy student population from UCSB. Additional engagements at the Healthy school lunch pantries and Vet hall in Santa Maria and Lompoc. Educated clients on text screening for eligibility and reminder of for tax deadlines

Target Area	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019

- 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:

Other	
Category	Actual (#)
Indirect Cost CAC	

Narrative of Expenditures in EARS and Outreach Activities

CAC Indirect Cost \$**1674.65**

Target Area	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

Narrative of Success Stories

Success Story #1

Target Area	13-Ventua/Santa Barbara
Reporting Period	March 1, 2019 - March 31, 2019
<p>Success Story #1</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p> <p>Success Story #2</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p> <p>Success Story #3</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p>	

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	February 1, 2019 - February 28, 2019		
Web			
Category		Metrics	
EITC Website Hits		31	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: JP Marketing Subcontractor Fees for website updates = \$190.00</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web: Update CalEITC 2018 webpage with links and images linked to FTB site calculator.</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>			
Social Media			
Number of Facebook Posts	12	Number of Tweets	12
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Are you self-employed? Don't forget any business expenses, and if you earned less than \$25,000, also don't forget to see if you qualify for the #CalEITC credit during tax time. Find out if it can help you. http://bit.ly/2BTixq8 #CalEITC #EITC #ItsYourMoneyGetIt #BenefitKitchen		Am I eligible for #CalEITC if I am a senior citizen? Yes! You can file for free at http://bit.ly/2saruWJ #EITC #ItsYourMoneyGetIt #BenefitKitchen	
		Exact Messaging of Most-Liked "Other" Post	

Target Area	12-Fresno	
Reporting Period	February 1, 2019 - February 28, 2019	
Number of Other Posts (Instagram, etc.)	1	Did you know most people in Fresno & Madera Counties qualify for FREE TAX PREP with an IRS certified volunteer? Find out if you qualify by calling 2-1-1 to schedule an appointment or click "Learn More" to visit our website for more information.

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
JP Marketing Subcontractor Fees Social Media updates = \$95.00

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 January and other posts to promote CalEITC and FTP volunteer recruitment.

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:
 Leveraging resources for February 2018 - CalEITC social media content calendar distributed by

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	100
Canvassing in Non-Targeted Zip Codes	300
New Individuals Who Received Text Messages	0
Phone Calls	0
Office Visits	50

Narrative of Expenditures in EARS and Outreach Activities

Target Area	12-Fresno
Reporting Period	February 1, 2019 - February 28, 2019

- 1) List the various activity-expenditures charging for this month and their cost:
Total Expenses for thei period: \$ 13,184.70
Staff Salaries :\$ 3456.89
 CEO Personnel: \$59.67hr x 14.25hrs= \$850.30
 Program Director: \$ 32.47hr x 12.5hrs= \$405.88
 VTA PProgram Manager: \$25.57 x 44.75hrs = \$1144.26
 Outreach and Education Coordinator: \$20.92hr x 50.5hrs= \$1056.46
- Service Fee for Tablets (Jan) : \$123.01**
Subcontractor Fee Interface: \$9604.80 (211 Hotline Phone service)
- 2) Provide broad overview of canvassing for targeted zip codes:
Attended events and handed out Cal EITC and Free tax Prep flyers to families/students who attended. Verbally shared recent changes to eligibility for tax credit, also Free tax Preparation site information and answered question asked by families/students.
- 3) Provide a broad overview of canvassing for non-targeted zip codes:
Distributed flyers to rural communites where the FTB Bus was scheduled for the month of Feb
- 4) Provide broad overview of text messages sent out, including the total number of text messages sent:
No text messages where sent out this month to new individuals.
- 5) Provide broad overview of Phone Calls conducted:
Emails and text message where send this month to remind clients about their appt and review Cal EITC eligibility for tax credits
- 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)

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	1	0	0	0
Paid Radio Ads	22	68,000	22	55,000
Public Services Announcements (Radio)	7	10,850	7	8,750
Paid Television Ads	24	10,975	4	7,183
Public Services Announcements (T.V.)	17	2,724	4	681
Billboards	0	0	0	0
Transit Advertisements	0	0	0	0
Internet/Website Ads	0	0	0	0
Social Media Promoted/Boosted Ads	1	210,926	0	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	12-Fresno
Reporting Period	February 1, 2019 - February 28, 2019

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

Total Expenses for this period: \$504.34

Staff Salaries :\$ 119.34

CEO Personnel: \$59.67hr x 2hrs= \$119.34

Ad purchase Fee : \$100.00

Subcontractor Fee JP Marketing: \$285.00 (Media purchase not included until March report after payment issued for service estimated cost \$11,500.00)**

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:

See attached report

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:

See attached report

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

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	1,580
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:

Staff Salaries: \$1096.16

Material Distribution Salaries: \$12.12hr x 31.75 hrs = \$ 384.81

Coordination of Distribution Salaries \$18.07hr x 28.75 hrs- \$519.51

Mileage for distribution: \$191.84

Target Area	12-Fresno
Reporting Period	February 1, 2019 - February 28, 2019

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

Provided flyers to community events, community partners and local nonprofit organizations in the area. Flyers contained information in regards to Cal EITC eligibility for tax credits and Free tax Preparation sites in the area .

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

No direct mailers went out this reporting period.

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

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	93706	02/14/19	60	No
Resource Fair	93711	02/21/19	50	No
School	93741	02/25/19	120	No
Resource Fair	93706	02/28/19	60	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity expenditures occurring for this month and their costs:

Target Area	12-Fresno
Reporting Period	February 1, 2019 - February 28, 2019
<p>1) List the various activity-expenditures charging for this month and their cost: Total Expenses for this period: \$180.84 Office Supplies for event coordinator Office Depot: \$180.84</p> <p>2) Provide a brief overview of events conducted during the reporting period: Events were community gathering, resource fairs and schools. Cal EITC and Fre Tax Preparation flyers were passed out to families and students eligibility for tax credit.</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>	
Other	
Category	Actual (#)
Grantee Meetings	3
Partner Meetings	12
Adminstrative/ Reporting	4
Narrative of Expenditures in EARS and Outreach Activities	
<p>Administrative Costs for Dec: \$ 2505.26 Grantee Required Staff Meetings for Feb : \$469.00 Program related meetings with Partners and Subcontractors for Feb: \$ 1108.65 Adminstrative/ Reporting with Program Staff for Dec: \$927.61</p>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
N/A	
Narrative of Success Stories	
Success Story #1	

Target Area	12-Fresno
Reporting Period	February 1, 2019 - February 28, 2019
<p>Success Story #1</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p> <p>Success Story #2</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p> <p>Success Story #3</p> <p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p>	

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	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	124

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: **CAPK:** \$713.72 For staff, website, Domain, and 10% indirect costs.

2) Provide a narrative of education and outreach activities conducted during the month under web:
CAPK: CAPK's Kern CalEITC Web Page is live, <http://kerneitc.org>, with links to the CAPK Home Page and CalEITC4me. The CAPK Web site VITA page also has links to the Kern CalEITC page. Staff is using the Hootsuite platform to manage CalEITC across web and social media platforms, allowing for more efficient scheduling and posting and assuring that the website link is included in social media posts. The website and social media posts will be in English Spanish and are in process of being translated. Content updates are ongoing as well.

CSET: The CSET CalEITC webpage address was featured on Social Media in:
 3 Facebook posts, 2 Instagram Posts, and 2 Twitter posts.

The webpage address is also directly linked to both of CSET's Social Media CalEITC Ad Campaigns; Facebook/Instagram and Twitter boosted advertisements.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 Kern CalEITC website has the potential to reach thousands of people through links to the already established CAPK, CAPK VITA, and Kern VITA Partnership, websites and Facebook pages.

Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019

Social Media

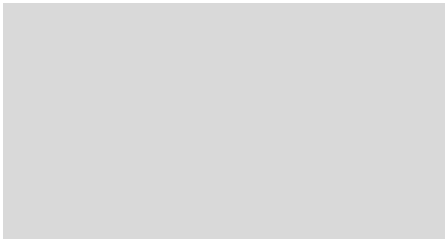
Number of Facebook Posts 10

Number of Tweets 4

Exact Messaging of Most-Liked Facebook Post

Exact Messaging of Most-Favorited Twitter Post

CAPK:Shared link- "How to file taxes if You're Experiencing Homelessness."
 CSET: The Big Game is Sunday, but kick off for CSET's VITA program is Saturday!



Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019

individuals, Twitter posts provided 1,027 impressions, Instagram posts reached 384 individuals. Collectively the **11** posts that occurred in February resulted in reaching **4,109** individuals.

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

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1042
Canvassing in Non-Targeted Zip Codes	104
New Individuals Who Received Text Messages	98,600
Phone Calls	101,600
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: **CAPK:** \$5,789.35 includes staff time, staff mileage, and 10% indirect.

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

CAPK: Although there was heavy rain throughout the month, the CalEITC staff was able to successfully canvas in 2 of the targeted zip codes, making 676 contacts, sharing information about CalEITC and VITA referrals.

- 93304 75 English and 9 Spanish contacts
- 93306 504 English and 88 Spanish contacts

CSET: Had 262 face to face canvassing took place at zip codes 93277 and 93291

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

CSET: Had 104 face to face canvassing at zip codes 93247 and 93257 and 8,575 face to face canvassing at zip coes 93219, 93274, 93286 and 93615

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

CAPK: Developing/securing text messaging to send out CalEITC and VITA info in March-April

Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019

CSET: The scheduling for AlertTC was confirmed. **98,600** text messages were sent on February 7, 2019 for the month of February.

5) Provide broad overview of Phone Calls conducted:

CAPK 2-1-1 Kern Information and Referral Help-line received over 3,000 calls in February for tax information, a 9% increase from the previous year, and scheduled 2,393 CAPK VITA appointments.

CSET: The scheduling for AlertTC was confirmed. **98,600** automated phone calls were sent on 2/7 for the month of February.

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: CAPK ordered an additional 10,000 Flyers and 10,000 Brochurs for the outreach push March through April.

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	31	11,890	20	7,910
Internet/Website Ads				
Social Media Promoted/Boosted Ads	2	326,299		

Narrative of Expenditures in EARS and Outreach Activities

Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019

1) List the various activity-expenditures charging for this month and their cost: **CAPK:** \$808.36 for staffing, and 10% indirect.

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: As part of the big media push for March - April, Developed **100** bus posters and **10,000** stickers to be printed/ran in the month of March. These ads will be in Golden Empire Transit buses throughout Bakersfield and some rural areas. Staff arranged English and Spanish Media stations to arrange large media push for the month of March to go along with social media and web push. CAPK will run social media boosts to correspond with the media push. A billboard campaign was also developed to support March through April media push. (**See attached Bus Poster Proof**)

CSET:

Transit Advertisements:

A total of 9 interior bus ads began running via Porterville public transit on 2/15. Porterville interior bus ads will run for the next couple of months and an exterior bus ad is scheduled to run by next month. A total of 20 interior bus ads and one exterior bus ad began running via Visalia public transit this month. Visalia interior bus ads will run for the next couple of months and the exterior bus ad will run for three months. Lastly, one exterior bus ad began running via Lindsay public transit and will run for a month. Based off of estimated start dates, which took place between the middle and end of February, a total of projected 19,800 impression took place across the three locations (30% of projected impressions).

Social Media Promoted Advertisements:

CSET's Social Media ad campaign is still running effectively. Impressions for the month of February include:

- **259,410** impressions through Facebook and Instagram
- **66,889** impressions through Twitter
- **Total of 326,229** impressions for February across Tulare County.

(The same ad sets are running continually from January through April, images are included attached to the report email)

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:

CAPK's CalEITC and VITA was mentioned 4 times in Television News reports in the month of February, with over 28,400 local viewers. CAPK staff also was able to get better rates for the planned television ads, beginning in March.

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	4,019
Number of New Individuals who Received Direct Mailers	2,248

Narrative of Expenditures in EARS and Outreach Activities

Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019

1) List the various activity-expenditures charging for this month and their cost: **CAPK:** \$5,379.11 includes staff time, staff mileage, television for looped messaging, and 10% indirect.

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

CAPK: This month staff focused on laundromats and markets in the targeted areas and were able to provide education and outreach materials. Staff also continued outreach at the Valley Plaza Mall and the VITA office lobby as well as the targeted zip codes. These activities resulted in distribution of 1,162 brochures and flyers.

A television with looped messaging was ordered and will be placed in CAPK's 19th Street lobby. This office building houses several programs, CAPK Energy, CAPK 211 Kern and CAPK VITA, with a shared waiting area. Including messaging in the lobby has the potential to reach as many as 300+ low-income people each week. Messages will promote CalEITC, EITC, and let visitors know that they can make an appointment during their visit for other services.

Brochure racks were also ordered for the 19th Street lobby. These will be filled with CalEITC brochures and flyers as well as other useful financial information.

CSET:

Distribution of flyers were at the following targeted zip codes:

93257, 302 flyers, reaching 2300 individuals

93277, 425 flyers, reaching 3750 individuals

93291, 475 flyers, reaching 3475 individuals

Distribution of flyers were at the following non-targeted zip codes:

93219, 1305 flyers, reaching 3350 individuals

93286, 115 flyers, reaching 1675 individuals

93274, 125 flyers, reaching 1650 individuals

93286, 110 flyers, reaching 1675 individuals

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

CSET: The EDDM postcards were mailed to three communities in Tulare County's southern region. Dates and times of VITA sites and links to CSET's VITA and CalEITC websites were included in the EDDM. The following is a breakdown of how many postcards were delivered per town:

Tipton, CA - Total of 627 EDDMs were delivered

Pixley, CA - Total of 950 EDDMs were delivered

Earlimart, CA - Total of 671 EDDMs were delivered

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	93311	02/02/19	300	No
Free Tax Prep	93291	02/02/19	85	No
Free Tax Prep	93291	02/09/19	107	No
Free Tax Prep	93286	02/05/19	15	No

Target Area	10-Kern/Tulare			
Reporting Period	February 1, 2019 - February 28, 2019			
Educational Forum	93286	02/13/19	15	No
Educational Forum	93274	02/12/19	25	No
Free Tax Prep	93291	02/16/19	100	No
Church	93256	02/20/19	10	No
Mega Event	93219	02/20/19	25	No
Free Tax Prep	93291	02/23/19	60	No
Educational Forum	93291	02/26/19	75	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: **CAPK:** \$1,606.94 includes staffing, staff mileage, and 10% indirect.

2) Provide a brief overview of events conducted during the reporting period:
CAPK: Staff had a vendor table at the California State University Bakersfield’s Migrant Parents Convention Resource Fair with over 300 attendees from the community. Staff was able to make contact and educate over 200 attendees about CalEITC and VITA, distributing 7 English and 202 Spanish brochures!
CSET: As taxpayers were being screened, they were told about Cal EITC. Presentations were done at Lindsay Family Resource Center, The Job Squad, First Baptist Church & Rite Aid

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:

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

CAPK: The rainy weather was a challenge for the month of February due to most activities being conducted outdoors. Staff increased outreach at business sites i.e. markets and laundromats, on days when the weather prohibited neighborhood canvassing.

Narrative of Success Stories

Success Story #1
CAPK: Date of Success Story: February 2019
Name of Person from Success Story: Not Given
Zip-Code Where Person Lives: Not Given
VITA Site where person got taxes done (if applicable):
Narrative: A VITA client who received CalEITC stated that he plans on putting the extra money in a savings account.
CSET: Date of Success Story: February, 2019
Name of Person from Success Story: N/A
Zip-Code Where Person Lives: ALL OF TULARE COUNTY
VITA Site where person got taxes done (if applicable):
Narrative: CSET adopted 9 Senior Centers and provide them with tax services and CAL EITC information

Target Area	10-Kern/Tulare
Reporting Period	February 1, 2019 - February 28, 2019
<p>Success Story #2</p> <p>CAPK: Date of Success Story: February 2019 Name of Person from Success Story: N/A Zip-Code Where Person Lives: Kern County VITA Site where person got taxes done (if applicable): CAPK VITA 300 19th Street, Bakersfield CA 93309 Narrative: The effect of CalEITC Outreach can be seen in the increase of CalEITC returns filed. CAPK VITA reports that when compared to last year at this time, they have completed 118 more CalEITC returns for an additional \$15,362 returned to low-income tax payers.</p> <p>CSET: Date of Success Story: February, 2019 Name of Person from Success Story: N/A Zip-Code Where Person Lives: 93618 VITA Site where person got taxes done (if applicable): Narrative: CSET engaged Dinuba Unified School District students and expanded the CAL EITC outreach into North Tulare County.</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-8011
Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

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:

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

Social Media

Number of Facebook Posts	5	Number of Tweets	5
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Join us Saturday March 9th at His Light Neighborhood Church from 10 a.m. to 2 p.m. for a Tacos & Taxes event. If your family made less than \$56,000 call (909) 347-1255 to make an appointment, and get your taxes filed for FREE. Also, find out if you're eligible for a #CalEITCcash refund! Assemblymember James C. Ramos County of San Bernardino https://a40.asmdc.org/.../20190309-caleitc-tacos-and-taxes-fr...		Tacos and Taxes at San Bernardino Valley College was a success! Thank you, Assemblymember Eloise Gómez Reyes, Congressman Pete Aguilar, SBCCD Trustee Frank Reyes, Councilwoman Blanca Gomez, and all the other guest for speaking to the community...	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
0		N/A	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

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

Social Media costs through Statewide Grant funds

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

Most of our social media is done statewide, and we only have one Facebook/Twitter profile. However we do periodically promote events or partners in San Bernardino County.

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:

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	5,377
Canvassing in Non-Targeted Zip Codes	6,449
New Individuals Who Received Text Messages	30,000
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 Organizers: 2,000
- Texting Managment: \$1,050
- Field Coordinator: \$4,285
- Field Organizer: \$2,000
- Canvassing Total: \$9,335

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

Plese see spreadsheet below for canvassing and interactions results. The targeted zip codes are highlighted. The reason for the high amount of interactions is our sub-grantee and partner Time for Change has a lot of volunteers that put in hours canvassing the neighboord via door-to-door and at

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

community events.

Event Date (Month/Date/Year)	Name of Activity (tax event, outreach event, etc)	Zip Code	City	Hours (ex. 12-2 pm)	Interactions
02/06/2019	Canvassing	92405	San Bernardino	9-12	503
02/07/2019	Canvassing	92404	San Bernardino	9-12	40
02/11/2019	Canvassing	92407	San Bernardino	9-12	1,000
02/12/2019	Canvassing	92408	San Bernardino	1-3	1,471
02/13/2019	Canvassing	92405	San Bernardino	1-3	1823
02/15/2019	Canvassing	92404	San Bernardino	1-3	189
02/18/2019	Canvassing	92405	San Bernardino	9-12	602
02/19/2019	Canvassing	92404	San Bernardino	9-12	775
02/20/2019	Canvassing	92404	San Bernardino	9-12	1,040
02/21/2019	Canvassing	92404	San Bernardino	9-12	732
02/25/2019	Canvassing	92410	San Bernardino	1-3	1,021
02/26/2019	Canvassing	92405	San Bernardino	1-3	1,020
02/27/2019	Canvassing	92376	San Bernardino	1-3	805
02/28/2019	Canvassing	92404	San Bernardino	9-12	775
					11796

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

Total number of texts sent to Riverside county contacts: 30,000

Treatment 1: Basic Informational Message + Link

Hi-this is _____ 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 Visit caleitc4me.org/CashBack to learn more about your eligibility and to claim your EITC refund.

Treatment 2: Promote Hotline

Hi-this is _____, 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. Call 211 to get free help with filing your return and to claim your EITC refund.

Treatment 3: Offer Text-based Assistance

Hi-this is _____ 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. Text "yes" and I can help you claim your EITC refund.

Treatment 4: Benefit Value

Hi-this is _____ a volunteer with CalEITC4Me. I'm contacting households who might qualify for a tax

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019
<p>For the 15 _____, a volunteer with CATERC is offering to help you contact people who might qualify for a tax refund. Even if you don't owe taxes, you could get cash back by filing a tax return. Eligible families got back an average of \$2,000 last year. Text "yes" and I can help you claim your EITC refund.</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>	

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	6	24,014	0	0

Narrative of Expenditures in EARS and Outreach Activities

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

Facebook Ads: \$11,900
 Consultant Monthly Retainer: \$525
 Communications Manager: \$ 1,000
Media Total: 13,425

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:

Please see attached PDF for example of Ads placed on Facebook.

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

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:

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:
- 2) Provide a broad overview of flyer/brochure and poster distribution:
- 3) Provide a listing and narrative of direct mailers that went out:

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

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

Group Events

Total Number of Events Held During the Reporting Period			2	
Location	Zip Code	Date	Attendance	Press at Event?
Free Tax Prep	92410	02/19/19	150	No
Free Tax Prep	92395	02/23/19	35	No

Target Area	9-San Bernardino			
Reporting Period	February 1, 2019 - February 28, 2019			

Narrative of Expenditures in EARS and Outreach Activities

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

Event Management: \$4,665 (GSO Staff Salary, includes Rental equipment such as tables and Chairs for the events)

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

GSO held two Tacos and Taxes events in San Bernardino County.

The first event was held at San Bernardino Valley Collge, this is the third consecutive year that we have held a Free Tax Prep. event at SBVC. It is great to have young adults be eligibile this year.

The second event was held at the Fam Spot resource center in Victorville. This event was not as big as the other events and most in attendance had appointments for taxes and there were not other groups involved or table.

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:

Other

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019
Category	Actual (#)
sub-grants	3

Narrative of Expenditures in EARS and Outreach Activities

First grant awarded to Time of Change Foundation - \$10,000 grant, First installment \$5,000 in December, Second installment in February for \$5,000

Second Grant awarded to Congregations for Prophetic Engagement (COPE) - - \$10,000 grant, First installment \$5,000 in December, Second installment in February for \$5,000

Third grant awarded Sigma Beta XI - \$10,000 grant, First installment \$5,000 in December, Second installment in February for \$5,000

15,000 total for sub-grants

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

One challenge was managing multiple events on the same day or weekend.

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:

Target Area	9-San Bernardino
Reporting Period	February 1, 2019 - February 28, 2019

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	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	3,777

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 The web costs continue to be for staff at both UWBA and UWWC to update and maintain our websites. The total cost for February for web was \$1,197.34 including:
- \$840.87 for CAP Sonoma and UWWC staff
 - \$278.14 for UWBA staff and rent
 - \$78.33 in administrative costs
- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 UWBA and UWWC continue to update and maintain info on our websites including site information and hours. UWBA had 1,249 visitors to the Cal EITC Page and 4,390 to the website overall. UWWC had 2,528 visitors to their page. Both websites continue to be used by the public to learn more about the Cal EITC and about how to file taxes for free.
- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 Media drives visitors to the websites so that potential clients have access to more information than would be available via ad.

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019

Social Media

Number of Facebook Posts	24	Number of Tweets	21
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
we are jumping for joy- our #volunteers received their #IRS certification to file for you for free! What are you waiting for? Come in and see if you qualify for #TaxCredits		Am I eligible for #CalEITC if I am a senior citizen? Yes! You can file for free at https://earnitkeepitsaveit.org/find-tax-help-now/ ...	
Number of Other Posts (Instagram, etc.)	6	Exact Messaging of Most-Liked "Other" Post	
		The #EITC is associated with lowering low birth weight rates, and healthier impacts for births to African American mothers. #AfricanAmericanHistory TinyURL.com/y43rjlf8 #IRS #California #TaxSeason #Impact	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: Along with staff costs for those creating and posting content, we also paid part of our contract to Golden State Opportunity Fund for costs related to social media ads. The total cost for February was \$5,100.80 including:

- \$1,887.10 for CAP Sonoma and UWWC staff costs
- \$2,700 for Golden State Opportunity Fund costs relating to social media marketing
- \$180 in UWBA staff costs and rent
- \$333.70 in administrative fees

Staff are posting many times per week which does take time out of each day to create, post, and respond to various social media channels.

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 UWBA, UWWC, and CAP Sonoma are all posting Cal EITC and VITA related content, so we are seeing high numbers in this area, especially in regards to the number of individual posts. We are using shared content from UWCA and we are also trying to align with online trends and hashtags. Posts in Spanish also continue to be popular.

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: Other popular messages were as follows:

Am I eligible for #CalEITC even if I don't owe any income tax? YES and you don't have to pay to file. Visit

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019

<http://bit.ly/2saruWJ>

Can you believe #tax season is here? New this year: you may be eligible for the cash-back credit CalEITC if you earned less than \$25,000. Many free tax prep assistance sites

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	840
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	12690
Phone Calls	152
Office Visits	62

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 The costs continue to be primarily for staff working on canvassing efforts, either on-the-ground or via text. The total cost for February was \$8,807.76 including:

- \$7,344 to Golden State Opportunity fund for costs relating to text canvassing
- \$360 in UWBA staff costs and rent
- \$527.55 in CAP Sonoma staff costs and rent
- \$576.21 in administrative costs

2) Provide broad overview of canvassing for targeted zip codes:
 CAP Sonoma was responsible for on the ground canvassing in Sonoma County, including phone calls and office visits. Golden State Opportunity Fund was responsible for text canvassing in both Sonoma and Contra Costa counties. CAP Sonoma targeted subsidized housing facilities throughout the county, focusing on Sonoma, Petaluma, and Santa Rosa. A total of 840 flyers were distributed at houses.

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019

Canvassers were out talking to individuals and leaving information.

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:
 In partnership with UC Berkeley, GSO has been testing different message treatments to assess which messaging works the best with potential filers. Once through that initial message testing, GSO will send out 1-2 additional texts around Tax Day and after Tax Day, letting potential filers know there is still time to file and claim the EITC.

5) Provide broad overview of Phone Calls conducted:
 More than 150 calls came into the CAP Sonoma office, and staff answered questions and provided information about the Cal EITC and free tax preparation services.

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	2		1	
Paid Radio Ads	112		84	
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	5	14,552	15	2,004
Public Services Announcements (T.V.)	4	6,001	1	4,032
Billboards	10	1,283,964	0	
Transit Advertisements	30	767,459	0	
Internet/Website Ads	1	981	1	125
Social Media Promoted/Boosted Ads	6	231,829	3	7,533

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Costs continue to be primarily for staff and for ad space, whether that be online, in print, via transit, or other types of media. The total cost for media for February was \$9,155.50 including:

- \$171.68 in UWBA Facebook ads
- \$569.50 in UWBA staff costs and rent
- \$7,815.36 for UWWC and CAP Sonoma costs including staffing, transit advertising, and boosted social ads
- \$598.96 in administrative 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:
 The impressions (where available) are outlined in the table above. UWWC has not been able to get

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019
<p>impression data for their radio ads in either English or Spanish, but will report when possible.</p> <p>UWWC has radio ads, as well as transit ads, and social media ads running. UWBA has television, transit, billboards, and social running throughout Contra Costa County.</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>UWBA received coverage for our kick-off in Alameda County and also had our interview with our staff person Ana Lagunas air on Univision regionally. A photo from her segment can viewed here: https://uwba.my.salesforce.com/sfc/p/U00000000lrmG/a/0B000000E0Pm/LVuoU8_Ct274.afsm.h2yzZQCQupsJLRpWt.a.jWs_U. UWWC staff Suzanne Harris was interviewed for Sonoma County Focus, an on-air program with Sonoma Media Group, and she was also interviewed by Wine Country Radio for replay on several of their stations. A volunteer was interviewed for Latino 95.5 & Exitos for on-air replay on these Wine Country Radio stations.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: In addition to English and Spanish advertising, UWBA also ran social media ads in Chinese and Vietnamese. These three ads had 11,944 impressions.</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	1,782
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: Costs continue to be for staff creating and dispersing materials. The total costs for February were \$1,508.20 including:</p> <ul style="list-style-type: none"> - \$657 in UWBA staff costs and rent - \$752.53 in UWWC and CAP Sonoma costs - \$98.67 in administrative costs

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019

2) Provide a broad overview of flyer/brochure and poster distribution:
 UWBA distributed materials through our tax sites, including our new site at Contra Costa College as well as at our Concord event. CAP Sonoma and UWWC continued to give out flyers at events through canvassing and at their tax sites.

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

Group Events

Total Number of Events Held During the Reporting Period			8	
Location	Zip Code	Date	Attendance	Press at Event?
School	95407	02/05/19	25	No
School	95401	02/08/19	22	No
School	95409	02/12/19	42	No
School	95407	02/13/19	45	No
School	95407	02/14/19	20	No

Target Area	8-Contra Costa/Sonoma			
Reporting Period	February 1, 2019 - February 28, 2019			
School	95401	02/20/19	18	No
School	95407	02/21/19	22	No
Educational Forum	94502	02/05/19	30	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Costs for February continued to be primarily for staff working on planning and presenting at events. The total cost for February was \$4,714.92 including:
 - \$2,700 to Golden State Opportunity fund for costs incurred while planning group events
 - \$577.66 in UWBA staff costs and rent
 - \$1,128.80 in staff costs for UWWC and CAP Sonoma
 - \$308.45 in administrative costs

2) Provide a brief overview of events conducted during the reporting period:
 CAP Sonoma attended several school events in February to meet with parents and provide information. Most events took place at the parent meetings as well as Parent/Child programming for children 0-5. UWBA also hosted our 'Tax Time Matters' event with First 5 and FESP in Concord, which sought to provide Cal EITC information and free tax preparation info to service providers.

We also dedicated time to planning future events with Golden State Opportunity Fund.

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

Other

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Canvassing efforts in Sonoma had to be flexible due to extreme weather and flooding. We would also love to coordinate better across the multiple agencies that serve this region but it is difficult due to the fast paced nature of tax season!

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:

Target Area	8-Contra Costa/Sonoma
Reporting Period	February 1, 2019 - February 28, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

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	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	26715

Narrative of Expenditures in EARS and Outreach Activities

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

Web Updates (**\$1000**)

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

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

OCUW Tax related pages **10,240** 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) **16,475** 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 and updated which includes an additional blog section on the OCFTP microsite. The OCFTP microsite is continually updated and content analyzed in relation to web hits. The digital ad campaign began in January and has increased the number of website hits considerably. Additionally the flyers, bus ads, and promotional materials have the viewer go to ocfreetaxprep.com for more information.

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019

Social Media

Number of Facebook Posts	22	Number of Tweets	15
Exact Messaging of Most-Liked Facebook Post #UCFreeTaxPrep makes it easier than ever for eligible taxpayers to file their income tax returns for FREE and to claim as many tax credits as possible. Find a location near you: https://bit.ocuw.org/2UDPOFX .		Exact Messaging of Most-Favorited Twitter Post Assemblywoman Cottie Petrie-Norris@AsmCottie I've partnered with @unitedwayoc to help residents file their taxes for FREE. On Friday 3/1 from 3pm - 7pm certified volunteers will be helping residents at the Costa Mesa Senior	
Number of Other Posts (Instagram, etc.)	11	Exact Messaging of Most-Liked "Other" Post	

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	16
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	0
Phone Calls	51
Office Visits	665

Narrative of Expenditures in EARS and Outreach Activities

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 **(\$14,000)**

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

CAPOC
 Canvassed a neighborhood and was able to interact face to face with **16 residents**. The addresses were collected for data to be sent to FTB.

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

Visited the OCCORD, OC Communities Organized for Responsible Development, office in Garden Grove (92843) to discuss the CalEITC program and build a partnership with the organization to have their

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019
<p>(92849) to discuss the CATCH program and build a partnership with the organization to have their stakeholders come and take advantage of our free tax preparation activities.</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: NA for February Last text message scheduled with 211 OC for March 26th.</p> <p>5a) Provide broad overview of Phone Calls conducted: CHIOC 51 calls were made to clients who live in Santa Ana.</p> <p>5b) Provide broad overview of Office Visits conducted: See OTHER</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: See OTHER</p>	

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads			180	11,270
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)	1	385		
Billboards				
Transit Advertisements	70	248,783	70	248,783
Internet/Website Ads	11	102,279		
Social Media Promoted/Boosted Ads	8	228,500	3	184,121

Narrative of Expenditures in EARS and Outreach Activities

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

Digital Ad Spend- management fees, reporting, analysis (**\$184.21**) Digital Ad Spend- ad purchase (**\$2,618.65**) Radio La Ranchera Feb (**\$5,460**) Transportation Advertising-bus wraps Feb (**\$12,000**) For a **total \$20,262.86**

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:

Spanish Radio

220 Spots between 1/28-2/18.

We have 40 spots in January and the rest will be in February.

La Ranchera proposed reach for 220 spots is 496,000.

Recommend 496,000 / 220 = 2254 for January impressions

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019

Recommend 490,000 +/- 220-2204 for January impressions.
 February would naturally have 5X more impressions. 2254 X 5 = **11,270**
Bus Ads Exterior and Interior cards 1/2 English/Spanish
 8 weeks 1/21-3/17
 4 Weeks exterior impressions 5,477,600 +4 weeks interior impressions 493,200=5970800
 1 week = 1,492,700 divided by 3 reporting periods= 497,666 impressions Feb 1/2 Eng/Span **248,783**
Digital Ad Campaign
 The digital ad strategy was to push paid ads heavy in January to reach the target demographic before they went to paid tax preparers and before the competition was in full swing. The campaign is scheduled to continue through April 15. **Reporting Feb. Impressions: Google 1,099,360 '/. 11 = 99,941, Facebook English 1,828,005 '/. 8 = 228,500 Facebook Spanish 552,364 '/. 3 = 184,121**
 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:
2/4/19 TV PSA Laguna Woods Village THIS DAY 10,800 views per month, 18,800 estimated viewership (10,800 '/. 28 days = **385 views**). Laguna Woods is a target zip code 92637. They are a closed retirement community and difficult to access. We were finally able to get an interview with our CEO, Sue Parks, to promote OC Free Tax Prep and the CalEITC expansion to 65+.
 4) Indicate any leveraging of other resources conducted this month in regards to media:
OCUW digital manager secured **65,481 impressions through Google grant ads**. As a non-profit we are eligible to receive. **65,481 '/. 28 days = 2,338 added to Internet/Website ads**

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	9,650
Number of New Individuals who Received Direct Mailers	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Print & Distribution (**\$513.37**), Mailing & Postage (**\$6.70**) **TOTAL \$520.07**

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

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019

984 Community Flyers and **492** CalEITC brochures English and Spanish distributed during 4 Resource Fairs and free tax prep at the Mexican Consulate and Melinda Hoag Smith Center. Also distributed during 7 CalEITC/Free Tax Prep (FTP) Presentations/Educational Forums to Volunteers, Service Providers, Liaisons, UCI College Students and Adults Computer Class. Additional **300** Community Flyers English and Spanish (**200** Vietnamese) dispersed through students at Santa Ana College. Special distribution **5,444** English Free Tax Prep flyers to 27 local elementary schools in Santa Ana, Costa Mesa and Garden Grove.

CHIOC

750 flyers and **500** brochures were distributed during the month of February across 14 site locations and events. The events are listed in the "group events narrative".

Site locations listed below:

Anaheim WIC - 92801, Buena Park WIC - 90621, HOPE Clinic - 92627, Placentia WIC - 92870, Santa Ana HCA - 92706, BAG Club Santa Ana - 92703, Santa Ana WIC West - 92704, Corbin FRY - 92704, Kid Works - Santa Ana 92703, Westminster County Field office Westminster 92683, Behavioral Health Anaheim 92806, Santa Ana Probation office 92701, Behavioral Health Santa Ana 92701 and Behavioral Westminster office 92683.

SOS

A total of **564 flyers** distributed. See details in "group events narrative"

CAPOC

Distributed **125 flyers** and brochures at community events listed in the "group events narrative". **200** given to OCCORD staff to include in their outreach care packages. **16 flyers** share with residents face to face and **75** were left at the doors of residents around the neighborhood.

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:

Email Newsletters

2/6 OCUW sent reminder email to former clients and to sign up for tax prep texts.

2/7 Cal State University Fullerton sent e-blast to students and alumni regarding FTP on campus.

2/23 Supervisor Andrew Do sent e-blast to constituents regarding ebus event in March.

2/25 Santa Ana College sent email to students and alumni regarding free tax prep on campus.

Group Events

Total Number of Events Held During the Reporting Period			32	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	92705	02/06/19	100	No
Educational Forum	92630	02/07/19	10	No
Resource Fair	92705	02/07/19	100	No
Resource Fair	92705	02/08/19	200	No
Free Tax Prep	92705	02/11/19	25	No

Target Area	7-Orange			
Reporting Period	February 1, 2019 - February 28, 2019			
Resource Fair	92663	02/13/19	50	No
Educational Forum	92705	02/20/19	13	No
Educational Forum	92707	02/20/19	30	No
Educational Forum	92614	02/21/19	26	No
Educational Forum	92617	02/22/19	20	No
Educational Forum	926701	02/26/19	20	No
Educational Forum	92663	02/27/19	20	No
Educational Forum	92663	02/28/19	11	No
Resource Fair	92805	02/02/19	200	No
Educational Forum	92707	02/07/19	14	No
School	92801	02/07/19	32	No
School	92866	02/14/19	12	No
School	92705	02/19/19	34	No
School	92843	02/21/19	35	No
School	92630	02/26/19	22	No
School	92780	02/28/19	6	No
Educational Forum	92867	02/28/19	41	No
Community Gathering	92805	02/05/19	30	No
Community Gathering	92802	02/06/19	50	No
Community Gathering	92683	02/07/19	45	No
Food Bank	92627	02/01/19	108	No
Health Care Clinic	92627	02/05/19	34	No
Health Care Clinic	92627	02/12/19	34	No
Food Bank	92627	02/14/19	50	No
Food Bank	92627	02/21/19	143	No
Food Bank	92627	02/22/19	132	No
Food Bank	92627	02/25/19	63	No
Narrative of Expenditures in EARS and Outreach Activities				
1) List the various activity expenditures occurring for this month and their costs.				

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019

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

CalEITC Education and Outreach Coordinator (**\$3,329.55**) OC Free Tax Prep Project Coordinator (**\$1804**)
 For a **total \$5,133.55**

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

OCUW

2/6, 7, 8 Resource Fair Hosted a table at the Santa Ana Mexican Consulate. Overall attendance was **400** with about **55** participants stopping at the booth to receive CalEITC brochures. We were also promoting free tax prep services that were held at that location. The center serves many individuals and families, mostly Spanish speakers.

2/7 Educational Forum CalEITC Education and Outreach Coordinator did a Spanish presentation about CalEITC and Free Tax Prep (FTP) to a group of SOC Family Resource Center volunteers in Lake Forest. This group of **10** volunteers share resources available at the FRC.

2/11, 27 Free Tax Prep CalEITC Education and Outreach Coordinator visited FTP site at the Mexican Consulate and Melinda Hoag Center for Healthy Living. Spoke with **8** families regarding CalEITC and collected success stories.

2/13 Resource Fair Hosted a table at the Melinda Hoag Smith Center for Healthy Living. Overall attendance was **50** with about **10** participants stopping at the booth and receiving CalEITC brochures English and Spanish . We also promoted free tax prep services that were held at this location. The center serves low-income individuals and families in the area of Costa Mesa.

See additional copy in attached Group Events Narrative.

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 resources:
 NA

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Canvassing Continued

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019

5b) Provide broad overview of Office Visits conducted:

SOS 176

Clients who met with staff or a volunteer to obtain services from organization were provided with a CalEITC/Free Tax Prep flyer. This included clients within target zip code 92627 and surrounding city of Costa Mesa.

CHIOC 489

Clients who met with staff or a volunteer to obtain services from organization were provided with a CalEITC/Free Tax Prep flyer across the following sites managed by CHIOC: Anaheim WIC - 92801, Buena Park WIC - 90621, HOPE Clinic - 92627, Placentia WIC - 92870, Santa Ana HCA - 92706, B&G Club Santa Ana - 92703, Santa Ana WIC West - 92704, Corbin FRC - 92704, Kid Works - Santa Ana - 92703, Westminster County Field office Westminster 92683, Behavioral Health Anaheim -92806, Santa Ana Probation office- 92701, Behavioral Health Santa Ana -92701 and Behavioral Westminster office -92683.

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:

OCUW is partnering with 3 sub-grantees for specific CalEITC canvassing, education and outreach activities in the following target zip codes:

Community Health Initiative of Orange County (CHIOC) \$5000

92701 and the surrounding City of Santa Ana including phone calls and office visits.

In the month of February, CHIOC posted social media, made phone calls, enrollment counselors conducted 1:1 office visits, and conducted outreach through group events.

Community Action Partnership of Orange County (CAPOC) \$4000

92683, 92804 and the surrounding cities of Westminster and Anaheim

In the month of February, EITC outreach coordinator posted social media, canvassed in targeted and non-targeted zip codes, distributed literature and attended group events.

Share Our Selves (SOS) \$5000

92627 and the surrounding city of Costa Mesa

In the month of February, CalEITC coordinator posted social media, distributed collateral through group food bank and health care clinic events. SOS 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	February 1, 2019 - February 28, 2019

SOS- Collecting data has been a challenge this month as clients were concerned about sharing their personal information.

Narrative of Success Stories

OCUW

Success Story #1

Date of Success Story: 2/27/19
 Name of Person from Success Story: Angel Torrez
 Zip-Code Where Person Lives: 92660
 VITA Site where person got taxes done (if applicable): Melinda Hoag Center for Healthy Living

Narrative:

Mr. Torrez and his family live in the city of Costa Mesa. Angel works as a machine operator for the Aquatec Company. His wife Maria does not work. She takes care of their children and home. The couple have two children, one in elementary and the other in high school. It is the first time that Angel filed taxes through OCFTP. Maria heard about the program through the Newport Mesa School District. In past years, Angel had to pay up to \$ 150 to receive assistance filing taxes. With their refund, Angel will pay debts and buy a new bed for his oldest son who is very dedicated and responsible. They are very happy to have qualified for FTP, and received \$309 EITC Credit! " The couple said "We will share about the program with other families and friends".

OCUW

Success Story #2

Date of Success Story: 2/11/19
 Name of Person from Success Story: Michelle Meza
 Zip-Code Where Person Lives: 92683
 VITA Site where person got taxes done (if applicable): Mexican Consulate

Narrative:

Michelle is a single mom with 2 kids; she works as a temp for a manufacturing company through Volt Jobs Employment Agency. Michelle lives in Westminster. This is the second year Michelle receiving FTP services. She used to pay up to \$300 to file her taxes. Michelle was very surprised to hear about EITC Credits and was very excited when she discovered her EITC credits were \$64 for CalEITC and \$4995 for federal!
 She shared that, "This money will help me pay for our basic needs ".

CAPOC

Success Story #1

Date of Success Story: 2/19/19
 Name of Person from Success Story: Marie Cruz Galvin

Target Area	7-Orange
Reporting Period	February 1, 2019 - February 28, 2019
<p>Zip-Code Where Person Lives: 92802 VITA Site where person got taxes done (if applicable): CAPOC Narrative: Marie Cruz was very responsible young adult who came-in ready to get her taxes done. She knew about the CalEITC and was eager to see what credits she was eligible for.</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-8008
Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

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:

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

Social Media

Number of Facebook Posts	5	Number of Tweets	5
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
We presented and handed out material to over 200 people at UDW Home Care Providers Union Riverside members meeting! #CalEITC #EITC#TaxRefund		Join us Saturday, February, 23 for Tacos & Taxes in Palm Desert. File your taxes for FREE, and find out if you're eligible to get cash back through the California and federal Earned Income Tax Credit. Assemblymember Eduardo Garcia College of the Desert	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

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

Social Media costs through Statewide Grant funds

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:

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	55
Canvassing in Non-Targeted Zip Codes	64
New Individuals Who Received Text Messages	25,000
Phone Calls	
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

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

Texting Management: \$1,250 (75/H for 16.666 Hours)
 Field Coordinator: \$4,285 (GSO Staff Salary)
 Field Organizer: \$2,000

Canvassing Total: \$7,535

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

55 Interactions at the College of the Desert Indio Campus

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

42 Interactions at the Lous Robidoux Library
22 Interactions at the Perris Valley Family Resource Center

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

Total number of texts sent to Riverside county contacts: 25,000

Treatment 1: Basic Informational Message + Link

Hi-this is _____ 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 Visit caleitc4me.org/CashBack to learn more about your eligibility and to claim your EITC refund.

Treatment 2: Promote Hotline

Hi-this is _____, 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. Call 211 to get free help with filing your return and to claim your EITC refund.

Treatment 3: Offer Text-based Assistance

Hi-this is _____ 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. Text "yes" and I can help you claim your EITC refund.

Treatment 4: Benefit Value

Hi-this is _____, 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. Eligible families got back an average of \$2,000 last year. Text "yes" and I can help you claim your EITC refund.

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

- 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:

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	6	61,255	0	0

Narrative of Expenditures in EARS and Outreach Activities

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

Facebook Ads: \$ 18,715.00
 Consultant Monthly Retainer: \$ 821.25
 Communications Manager: \$ 1,000
Media Total: 20,536.25

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:

Please see attached PDF for example of Ads placed on Facebook

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

Please see attached PDF for example of Ads placed on Facebook.

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:

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	62,500
Number of New Individuals who Received Direct Mailers	10,000

Narrative of Expenditures in EARS and Outreach Activities

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

Direct Mail program: \$13,561.56

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

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

Costs covered in January but flyers were distributed in February.

Eligibility Chart: 25,000
Benefits Checklist: 25,000
Young Adults Post Card: 12,500

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

Direct Mailers went out to 10,000 potential tax filers in Riverside County. These contacts were also texted so we can analyze the effectiveness of each outreach tactic.

Please see attached PDF for an example of what the mailer looked like.

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

Group Events

Total Number of Events Held During the Reporting Period			2	
Location	Zip Code	Date	Attendance	Press at Event?
Free Tax Prep	92571	02/22/19	75	No
Free Tax Prep	92201	02/23/19	200	Yes

Target Area	6-Riverside			
Reporting Period	February 1, 2019 - February 28, 2019			

Narrative of Expenditures in EARS and Outreach Activities

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

Event Management: \$4,465 (GSO Staff Salary)

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

GSO held 2 big Tacos and Taxes Event in Riverside County in February.

The first event was held at the Perris Valley Family Resource Center. This was also a resource fair with 211, TODEC, and Grid Alternatives tabling the event.

The second was held at College of the desert-Indio Campus. Also in attendance was Planned Parenthood. Media Telumundo was in attendance. Please see picture below of our Inland Director Blanca Lopez being interviewed. Unfortunately Telumundo only airs on television and we do not have a recording of the newscast.

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

4) Any other resources used for this activity including of other resource



Other

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019
Category	Actual (#)
sub-grants	3

Narrative of Expenditures in EARS and Outreach Activities

First grant awarded to TODEC Legal Center - \$10,000 grant, First installment \$5,000 in December, Second installment in February for \$5,000

Second Grant awarded to Community Action Partnership Riverside - - \$10,000 grant, First installment \$5,000 in December, Second installment in February for \$5,000

Third grant awarded to All of or None - - \$10,000 grant, First installment \$5,000 in December, Second installment in February for \$5,000

15,000 total for sub-grants

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

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Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

One challenge was managing multiple events on the same day or weekend.

Narrative of Success Stories

No Success Stories to Report

Target Area	6-Riverside
Reporting Period	February 1, 2019 - February 28, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	United Way California Capital Region	
Grantee Representative		
Telephone Number		
Email Address		
Contract Number		
Target Area		
Reporting Period	February 1, 2019 - February 28, 2019	
Web		
Category	Metrics	
EITC Website Hits	2,920	
Narrative of Expenditures in EARS and Outreach Activities		
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Program: \$0.00 Wages: \$142.05 Benefits: \$8.44 Payroll Taxes: \$11.39 Subtotal: \$161.88 Indirect (11% of category total): \$17.81 Total for Web: \$179.69</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web: Added new digital content to support Cal EITC activity including blog post - https://www.yourlocalunitedway.org/post/five-tax-tips-save-time-and-money-0 - Tax Prep season kick off https://www.yourlocalunitedway.org/post/free-tax-2019-kickoff</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>		

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

Social Media

Number of Facebook Posts	2	Number of Tweets	0
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
The Tax bus has arrived in west Sac! Rain or shine, our Free Tax Prep team is here for you to help you save money on your taxes. Stop by and find out if you're eligible to receive #CalEITC and #EITC			
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:
Wages: 142.05
Benefits: 8.44
Payroll Taxes: 11.39
Subtotal: 161.88
Indirect (11% of Category Total): 17.81
Total Costs for Social Media: 179.69

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:

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019
Canvassing	
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	2532
Canvassing in Non-Targeted Zip Codes	8879
New Individuals Who Received Text Messages	
Phone Calls	16
Office Visits	562
Narrative of Expenditures in EARS and Outreach Activities	
<p>1) List the various activity-expenditures charging for this month and their cost: Program: \$7,936.79 Wages: \$304.11 Benefits: \$40.33 Payroll Taxes: \$23.27 Subtotal: \$8,304.50 Indirect (11% of category total, excluding program costs from subcontractors): \$40.45 Total for Canvassing: \$8,344.95</p> <p>2) Provide broad overview of canvassing for targeted zip codes: See Attached Expanded Narrative.</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: See Attached Expanded Narrative.</p>	

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

See Attached Expanded Narrative.

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

See Attached Expanded Narrative.

5) Provide broad overview of Phone Calls conducted:

See Attached Expanded Narrative.

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 Expanded Narrative.

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads	2	429,200		
Public Services Announcements (Radio)	1	390,000		
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements	2	3,175,608		
Internet/Website Ads	2	68,795		
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:

Program: \$0.00

Wages: \$355.11

Benefits: \$21.10

Payroll Taxes: \$28.47

Subtotal: \$404.68

Indirect (11% of category total): \$44.51

Total for Media: \$449.19

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:

Please see attached PDF

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

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:
 PSA interview on 2/28 with Entercom (390,000 gross impressions)

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	6,000
Number of New Individuals who Received Direct Mailers	

Narrative of Expenditures in EARS and Outreach Activities

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

Program: \$0.00
 Wages: \$355.11
 Benefits: \$21.10
 Payroll Taxes: \$ 28.47
 Subtotal: \$ 404.68

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019
<p>Indirect (11% of category total): \$44.51 Total for Collateral Messaging: \$449.19</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: 66 volunteers delivered direct mailers on 3 separate events throughout the Sacramento region.</p> <p>3) Provide a listing and narrative of direct mailers that went out: See attached PDF.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources:</p>	

Group Events				
Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	95824	02/25/19	30	No
Educational Forum	95826	02/28/19	20	No
Community Gathering	95824	02/05/19	50	No
Hmong Radio	95691	02/05/19	Unknown	Yes
Educational Forum	95825	02/08/19	9	No

Target Area	February 1, 2019 - February 28, 2019			
Reporting Period				
Community Gathering	95824	02/08/19	100	No
Community Gathering	95841	02/08/19	200	No
Community Gathering	95824	2/9/2019	110	No
Community Gathering	95824	2/10/2019	205	No
Educational Forum	95821	02/11/19	20	No
Educational Forum	95825	02/13/19	9	No
Community Gathering	95825	02/14/19	89	No
Educational Forum	95821	02/14/19	40	No
Free Tax Prep	95824	02/15/19	100	No
Community Gathering	95821	02/15/19	400	No
Community Gathering	95820	2/16/2019	50	No
Free Tax Prep	95825	02/16/19	12	No
Free Tax Prep	95824	02/16/19	100	No
Community Gathering	95824	02/16/19	50	No
Community Gathering	95824	2/19/2019	35	No
Community Gathering	95817	2/20/2019	45	No
Community Gathering	95821	02/20/19	300	No
Community Gathering	95610	2/21/2019	45	No
Educational Forum	95825	02/22/19	8	No
Community Gathering	95824	02/22/19	100	No
Free Tax Prep	95825	02/23/19	8	No
Community Gathering	95824	02/23/19	75	No
Community Gathering	95824	02/23/19	30	No
Community Gathering	95821	02/23/19	20	No
Educational Forum	95821	02/25/19	14	No
Educational Forum	95825	02/27/19	17	No
Educational Forum	95821	02/27/19	18	No
School	95825	02/28/19	15	No
School	95825	02/28/19	17	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity expenditures occurring for this month and their cost.

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

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

Program: \$4,155.60
Wages: \$304.11
Benefits: \$ 40.33
Payroll Taxes: \$23.27
Subtotal: \$4,523.31
Indirect (11% of category total, excluding program costs from subcontractors): \$40.45
Total for Group Events: \$4,563.76

2) Provide a brief overview of events conducted during the reporting period:
See attached expanded narrative document.

3) If members of the press attended an event, indicate which press outlets:
See attached expanded narrative document.

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

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

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:

Target Area	
Reporting Period	February 1, 2019 - February 28, 2019

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	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	447

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 UWBA continued to update our website to ensure our map was correct and made some changes to the overall layout to make the page more user friendly. The total cost for web was \$429.88 including \$401.75 in staff costs and rent, and \$28.12 in administrative costs. We also had 4,370 visits to the website overall.

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
 As always, we ensure that data on our site is up to date by encouraging sites to check their data and getting feedback from clients. We also worked this month to make the site more user friendly and to help clients find a tax site more quickly.

- 3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 Because much of our advertising encourages people to visit our website, it is critical that it is up-to-date and provides information easily.

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

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	
we are jumping for joy- our #volunteers received their #IRS certification to file for you for free! What are you waiting for? Come in and see if you qualify for #TaxCredits		Am I eligible for #CalEITC if I am a senior citizen? Yes! You can file for free at https://earnitkeepitsaveit.org/find-tax-help-now/ ...	
Number of Other Posts (Instagram, etc.)	4	Exact Messaging of Most-Liked "Other" Post	
		The #EITC is associated with lowering low birth weight rates, and healthier impacts for births to African American mothers. #AfricanAmericanHistory TinyURL.com/y43rjlf8 #IRS #California #TaxSeason #Impact	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Social media costs continue to be largely allocated for staff time dedicated to creating content and posting online. We also paid our subcontractor, GSO, to cross-promote online. The total cost for social media was \$4,451.20 including:

- \$3,900 to Golden State Opportunity Fund for costs related to social media posts
- \$260 in UWBA staff costs and rent
- \$291.20 in administrative costs

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 As always, we continue to use tested data whenever possible from UWCA and other avenues to ensure posts are getting traction. We also continue to try and align posts with other things that are trending or are popular on 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:
 We also continue to receive messages from clients via direct message on social media channels, which can be a helpful way to answer questions.

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

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	4,155
Phone Calls	214
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
 Costs continue to support UWBA staff for coordination relating to text and we also paid the first part of a payment installment to Golden State Opportunity Fund to support text canvassing throughout our region. The total costs for canvassing were \$11,906.96 including:
 - \$10,608 to Golden State Opportunity Fund for costs related to texts canvassing
 - \$520 in UWBA staff costs
 - \$778.96 in administrative costs
- 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

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

sent:
 In partnership with UC Berkeley, GSO staff have been testing different message treatments to assess which messaging works the best with potential filers. Once through that initial message testing, GSO will send out 1-2 additional texts around Tax Day and after Tax Day, letting potential filers know there is still time to file and claim the EITC. Note -- after Tax Day, GSO will provide texts that will be sent in each of the high eligibility target zip codes.

5) Provide broad overview of Phone Calls conducted:
 211 Bay Area made 214 referrals (not including appointments for tax sites) in San Mateo and San Francisco counties in February.

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

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	5	14,848	15	1,995
Public Services Announcements (T.V.)	4	5,973	1	4,013
Billboards	10	1,277,965	0	0
Transit Advertisements	11	763,873	0	0
Internet/Website Ads	1	976	1	124
Social Media Promoted/Boosted Ads	3	201,743	3	7,498

Narrative of Expenditures in EARS and Outreach Activities

- List the various activity-expenditures charging for this month and their cost:
 Our costs for February continued to be allocated for ongoing social media ad costs and UWBA staff and rent for those working on media. We began our television ads but did not pay for them until March.
 Total media costs for February were \$1,145.54 including:
 - \$247.98 for Facebook ads
 - \$822.61 for UWBA staff costs and rent
 - \$74.94 in administrative fees
- 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:
 The impressions for each ad are listed above. We were thrilled to unveil new transit and outdoor ads

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

for this season that give our program a fun, fresh, and energetic feel. We wanted to ensure that potential clients received important data but also felt like filing with EKS and VITA would be an easy and fun experience, which it often is! Ads are appearing on billboards, in transit stations, and on bus shelters throughout the Bay Area. These are viewable online here:

<https://pop.cco.io/campaign/209377/current>. We also rolled out 30 and 15 second spots on television and on news websites with NBC Bay Area and Telemundo. Finally, we updated our social media ads to reflect our new look and feel (modeled on the outdoor ads). GSO also began social media ads with our support. These ads are targeting newly eligible populations (18-24 and 65+) on Facebook and Instagram, and are “layered” or partially matched with texting contacts.

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:

We were thrilled to have two earned media events on television, including coverage of our kick-off event in Oakland with Mayor Libby Schaaf, which played throughout the Bay Area, and an interview on Univision with our staff person Ana Lagunas, who is a fluent Spanish speaker. A photo from her segment can be viewed here:

https://uwba.my.salesforce.com/sfc/p/U0000000IrmG/a/0B000000E0Pm/LVuoU8_Ct274.afsm.h2yzZQCQupsJLRpWt.a.jWs_U.

4) Indicate any leveraging of other resources conducted this month in regards to media: Along with English and Spanish ads, we continued to run 2 Facebook ads geared toward the Chinese

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	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:
 The total costs for collateral continue to be for staff time. The total costs for collateral messaging were \$1,015.43 including:

- \$949.00 in staff costs and rent
- \$66.43 in administrative fees

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

- 2) Provide a broad overview of flyer/brochure and poster distribution:
 Most of our flyers were distributed to our partners in December and January, but we did distribute a small amount in February as well.
- 3) Provide a listing and narrative of direct mailers that went out:
 We do not directly send direct mailers.
- 4) Any other additional information pertinent to work conducted including leveraging of other resources: N/a

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	94103	02/08/19	35	No

Target Area	4-San Francisco/San Mateo			
Reporting Period	February 1, 2019 - February 28, 2019			

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 We continued to plan future group events which was the primary cost. The total cost for group events was \$5,065.81 including:

- \$3,900 to Golden State Opportunity Fund for costs relating to planning group events
- \$834.40 for UWBA staff costs and rent
- \$331.41 in administrative costs

2) Provide a brief overview of events conducted during the reporting period:
 We conducted an event with San Francisco Community Ambassadors, a city-wide program that utilizes staff and volunteers to assist with various community issues.

3) If members of the press attended an event, indicate which press outlets:
 This was not a press event.

4) Any other additional information pertinent to work conducted, including leveraging of other resources:
 We are looking forward to future events coming soon in San Mateo and San Francisco counties!

Other

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Our main challenge in February was simply having enough time to place ads, coordinate activities, and make sure all of our tax sites were getting open in time! February is always a busy month and this one was no different.

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:

Target Area	4-San Francisco/San Mateo
Reporting Period	February 1, 2019 - February 28, 2019

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	February 1, 2019 - February 28, 2019

Web

Category	Metrics
EITC Website Hits	965

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Costs for web continue to be allocated for staff time dedicated to the updating of our site. The total spend for web for February was \$925.89 including \$865.32 in staff costs and rent for staff working on the web, and \$60.57 in administrative costs.

2) Provide a narrative of education and outreach activities conducted during the month under web:
 We continued to update our map as often as needed and also worked during the month of February to improve the user experience and make it easier for clients to find a tax site. Along with the 965 visits to our Cal EITC page, we had 9,437 visitors to the website overall.

3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources:
 This year, many of our ads link directly to our website, so we are happy to have made it even easier for clients to find a tax site and receive assistance!

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019

Social Media

Number of Facebook Posts	16	Number of Tweets	15
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
we are jumping for joy- our #volunteers received their #IRS certification to file for you for free! What are you waiting for? Come in and see if you qualify for #TaxCredits		Am I eligible for #CalEITC if I am a senior citizen? Yes! You can file for free at https://earnitkeepitsaveit.org/find-tax-help-now/ ...	
Number of Other Posts (Instagram, etc.)	4	Exact Messaging of Most-Liked "Other" Post	
		The #EITC is associated with lowering low birth weight rates, and healthier impacts for births to African American mothers. #AfricanAmericanHistory TinyURL.com/y43rjlf8 #IRS #California #TaxSeason #Impact	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Costs continue to support UWBA staff working on creating and posting social media and to our subcontractors for work online. The total social media costs for February were \$9,587.20 including:
 - \$8,400 to Golden State Opportunity Fund as a subcontractor for social media activities
 - \$560 in UWBA staff costs and rent
 - \$672.20 in administrative costs

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 As always, we use tested material from UWCA to encourage interest in our social media posts and align messaging throughout the state. We also try and tie social media posts in with other relevant and trending topics online. This month, our subcontractor EBALDC also posted Cal EITC relevant material.

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	February 1, 2019 - February 28, 2019

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	321
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	13,661
Phone Calls	413
Office Visits	0

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Canvassing costs included UWBA staff time for coordinating activities, as well as payments to three subcontractors for different types of canvassing outreach.
 Total costs for February were \$51,325.76 including:
 - \$22,848 to Golden State Opportunity Fund for text canvassing activities
 - \$6,000 to Eden I&R for 211 support
 - \$18,000 to Sacred Heart Community Services for door to door canvassing activities
 - \$1,120 in UWBA staff costs and rent
 - \$3,318.63 in administrative costs

2) Provide broad overview of canvassing for targeted zip codes:
 Sacred Heart Community Services is trying a pilot door-to-door canvassing effort with our support. During the month of February, they canvassed the following area codes: 95116, 95112, 94089, and 95111. Each block canvassed contained roughly between 150 to 300 houses per block. Each block was made up of a mixture of traditional houses, duplexes, and apartments. They knocked on doors in the allowed block area and engaged with as many people as possible, including one-on-one engagement with people in the community. They provided people with brochures while we explained to them what the EITC credit was, how it functioned, and how they could benefit from this credit if they were to apply and qualify. In addition, they also provided the community with a working

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019

phone number that they could send a text message to and get screened for the EITC credit to determine if they qualified. From the canvassing we did, we learned that many families were not aware of the benefits provided from this credit and many individuals expressed interest in learning more about how they can qualify for the credit. Unfortunately, there were also people who expressed interest but had surpassed the EITC income limit. Nevertheless, we took the opportunity to inquire about their social circle, asking them if they knew anybody who made less than the income limit requirement.

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:
 In partnership with UC Berkeley, GSO has been testing different message treatments to assess which messaging works the best with potential filers. Once through that initial message testing, GSO will send out 1-2 additional texts around Tax Day and after Tax Day, letting potential filers know there is still time to file and claim the EITC. Note: after Tax Day, GSO will provide texts that will be sent in each of the high eligibility target zip codes.

5) Provide broad overview of Phone Calls conducted:
 Eden I&R and Bay Area 211 made 413 referrals to tax sites and answered questions for taxpayers for Alameda and Santa Clara counties.

6) Any other additional information pertinent to work conducted during the month in relation to canvassing, including indicating

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	5	31,280	15	4,308
Public Services Announcements (T.V.)	4	12,900	1	8,667
Billboards	34	2,000,000	0	0
Transit Advertisements	40	1,649,679	0	0
Internet/Website Ads	1	2,108	1	268
Social Media Promoted/Boosted Ads	3	435,689	3	16,193

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Media costs for February were primarily related to staff costs. While we began running ads in February, many of the costs were accrued in March and will be reported later. Media costs for February were \$2,467.31 including:
 - \$534.12 for Facebook ads
 - \$1771.78 for UWBA staff costs and rent
 - \$161.41 in administrative 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:
 Impressions have been tallied above using the CSD guidelines. Based on feedback from our vendor, the billboards have an extremely high rate of impressions, which we have capped at 2,000,000 above to be more in line with what is reasonable. We were thrilled to unveil a new outdoor and transit campaign this

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019
<p>more in line with what is reasonable. We were limited to divert a new outdoor and transit campaign this year that uses fresh imagery and very clear language to encourage filers to use free tax preparation at our sites! We tried to make the ads bright, fun, and energetic to reduce some of the anxieties around tax season. We have also transferred those same images to social media. We have also started running 15 and 30 second spots on NBC Bay Area and Telemundo. GSO also began social media ads with our support. These ads are targeting newly eligible populations (18-24 and 65+) on Facebook and Instagram, and are “layered” or partially matched with texting contacts.</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: We received local news/Bay Area wide coverage for our kick-off event in Oakland with AC-OCAP and Mayor Libby Schaaf. We were also thrilled to have our staff member, Ana Laguna, interviewed on Univision about free tax prep and how to access credits. Ana is our resident fluent Spanish speaker.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: In addition to English and Spanish ads, we also have one Chinese and one Vietnamese ad on Facebook. The impressions for these ads were 25,673.</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	9,600
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: The costs for collateral messaging were primarily for staff working on design and delivery of materials. The total costs for February were \$2,627.74 including:</p> <ul style="list-style-type: none"> - \$411.83 for site specific materials including signage - \$2,044 in staff costs and rent - \$171.91 in administrative costs

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019

2) Provide a broad overview of flyer/brochure and poster distribution:
 UWBA continued to provide flyers to all of our partners that asked for them, including dropping off printed materials at many sites in Alameda and Santa Clara counties. EBALDC distributed flyers to residents at 29 properties, SparkPoint centers, as well as other partners (Laney College, SparkPoint Oakland, Next Step Learning Center, West Oakland Job Resource Center, Support Future Growth, Head Start, LCC Afterschool program). The flyers are in English and Chinese. Along with these client-specific materials, we also continued to provide new site signage including lawn signs and sandwich boards to many of our new sites.

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:
 As part of Sacred Heart's canvassing work, they also distributed more than 800 printed ads and door hangers in both English and Spanish. Therefore, in addition to the 312 clients that they spoke with directly, they were able to reach another 800 through printed materials. We also have organizations send out digital versions of flyers and materials. For example, EBALDC sent flyers to Futures and CUES, OHA Lockwood Gardens, and Alameda County Health Department.

Group Events

Total Number of Events Held During the Reporting Period			6	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	95110	02/09/19	2	No
Educational Forum	94541	02/26/19	50	No
Free Tax Prep	94612	02/21/19	50	Yes
Community Gathering	94607	02/06/19	170	no
Community Gathering	94608	02/28/19	15	no

Target Area	3-Alameda/Santa Clara			
Reporting Period	February 1, 2019 - February 28, 2019			
Free Tax Prep	94501	02/20/19	15	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Costs for group events were primarily for UWBA staff and for payments to our subcontractors for work going forward.
 The total cost for group events in February was \$20,676.86 including:
 - \$3,127 to EBALDC to support group events
 - \$8,400 to Golden State Opportunity Fund to support group events
 - \$6,000 to Eden I&R for community outreach events and support
 - \$1,797.17 in UWBA staff costs and rent
 - \$1,352.69 in administrative costs

2) Provide a brief overview of events conducted during the reporting period:
 We had a wide and varied number of events in Alameda and Santa Clara counties including our kick-off/free tax prep event, a free tax prep event in the underserved City of Alameda at Alameda Point Collaborative, as well as numerous outreach fairs and community gatherings.

3) If members of the press attended an event, indicate which press outlets:
 We had a number of news stations as well as print join our kick-off in Oakland with Mayor Libby Schaaf, including KGO and KQED.

4) Any other additional information pertinent to work conducted, including leveraging of other resources:
 We continue to leverage the partnerships of our subcontractors in reaching out populations and groups that we don't normally have access to. For example, our partners at Eden I&R/211 Alameda County held an outreach event with Seniors and were able to present our material there.

Other

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

February is always a busy month and this year was no different! Getting our sites up and running, and troubleshooting issues is always one of the biggest lifts for February, as last minute issues always arise. We were thrilled this year to be able to try some new outreach models, and were happy to report that we faced few challenges with getting out the data or info needed to start these models.

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:

Target Area	3-Alameda/Santa Clara
Reporting Period	February 1, 2019 - February 28, 2019

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	February 1, 2019 - February 28, 2019

Web	
Category	Metrics
EITC Website Hits	2,896

Narrative of Expenditures in EARS and Outreach Activities

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

In February, our 2-1-1 San Diego tax information web page highlighted CalEITC eligibility for young adults ages 18-24 and seniors ages 65 and above. Information regarding free VITA appointments, income guidelines and the tax credits available remained on our web page along with information for 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. There were 2,495 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:

We continue to highlight EITC and CalEITC eligibility for various target populations and redirect those interested in CalEITC and free VITA tax preparation to call 2-1-1 for further assistance.

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	February 1, 2019 - February 28, 2019

Social Media

Number of Facebook Posts	8	Number of Tweets	7
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Call 211 to learn more about @Cal EITC 4 Me and eligibility for free tax prep assistance! We are proud to partner with United Way of San Diego County to promote these available credits in our region! #itsyourmoneygetit		If your household income is less than \$54,000 you may be eligible to receive a EITC credit! In addition, you may also qualify to receive a credit from CalEITC if you made less than \$22,300, even if you're http://self-employed.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

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

In the month of February, there were a total of 8 Facebook posts and 7 Twitter posts published. There were a total of 2,212 Facebook reaches and 3,094 Twitter impressions.

Social Media costs: 15 posts = 7.50 hours x \$41.67 per hour = \$312.53

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

In February, we raised awareness and use of federal and state EITC through social media by highlighting our partnership with United Way of San Diego, and leveraging social media from local news media, specifically KUSI.

We also highlighted the impact EITC has on children's education according to studies.

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

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	5,871
Canvassing in Non-Targeted Zip Codes	
New Individuals Who Received Text Messages	0
Phone Calls	32,655
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	2-San Diego
Reporting Period	February 1, 2019 - February 28, 2019

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

2-1-1 San Diego conducted 32,655 one-to-one phone interactions for CalEITC, EITC, and VITA through inbound and outbound activities.

2-1-1 San Diego phone calls: 6,705 inbound calls = 670.50 hours x \$24.30 per hour = \$16,293.15
 25,950 outbound calls = 4,325 hours x \$24.30 per hour = \$105,097.50

2-1-1 San Diego contact center management:

Service Delivery Manager: 20 hours x \$41.28/hr = \$825.60
 Program Assistants: 11.16 hours x \$25.50/hr = \$284.58
 Director of Enrollment & Navigation Services: 26 hours x \$53.54/hr = \$1,392.04
 Senior Data Analyst: 8 hours x \$54.60/hr = \$436.80

2-1-1 San Diego training: Community Connectors: 16 hours x \$24.30/hr = \$388.80

Child Development Associates: \$195.00

Dreams For Change: \$3,718.45

ElderHelp: \$216.00

International Rescue Committee: \$1,526.32

YMCA Childcare Resource Service: \$700.00

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

ElderHelp conducted 155 door-to-door activities providing CalEITC outreach and education, and YMCA conducted 597. IRC also conducted door-to-door activities, and CDA conducted 50 interactions in person and over the phone.

Dreams for Change conducted 2,678 door-to-door outreach activities in the following zip codes: 91910, 91911, 92021, 92025, 92101, 92105, and 92115.

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 has been arranged to take place by the Riverstar scheduling system on March 14th and 20th. 6,000 text messages will be sent out to previous VITA clients, in batches of 3,000.

5) Provide broad overview of Phone Calls conducted:

Of the 32,655 one-to-one phone interactions conducted by 2-1-1 San Diego, 5,871 of those were in the targeted zip codes of 91910, 91911, 92101, 92105, and 92115. The remaining 26,784 were in non-targeted zip codes.

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:

Inbound and outbound phone activity will continue during the month of March 2019 in targeted and non-targeted zip codes.

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.)				

Target Area	2-San Diego			
Reporting Period	February 1, 2019 - February 28, 2019			
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads	23	26,694		

Narrative of Expenditures in EARS and Outreach Activities

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

Our Facebook ad was activated on February 21st and will run through May, though it will not appear in our expenses until March. The Facebook ad is expected to reach approximately 680,000 people based on audience targeting, and displays the following message:

"Tax Season is Here! Don't Miss Out on Available Tax Credits like CalEITC! Call 2-1-1!"

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:

Facebook ads reached 26,694 people the last week of February, and had 23 post engagements. 57% of those reached were men, and the remaining 43% were women.

Expanded target populations reach:

4,973 were men ages 18-24 and 4,765 were women ages 18-24.

488 were men ages 65 and above and 432 were women ages 65 and above.

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:

United Way and 2-1-1 San Diego were highlighted promoting CalEITC and free tax assistance in the Mission Times Courier on 2/8/19, in the section titled "United Way and 2-1-1 to offer free tax prep":

<https://missiontimescourier.com/news-briefs-feb-8-2019/>

The San Diego Uptown News highlighted the partnership of United Way and 2-1-1 San Diego to help access free tax assistance on 2/8/19, in the section titled "Nonprofits offer tax services to county":

<https://sduptownnews.com/new-signs-for-little-saigon-district-womens-symposium-returns-to-normal-heights/>

Our partnership with United Way San Diego was also highlighted on the topic of "How to Get Your Taxes Done for Free and Get Money Back with the Earned Income Tax Credit" on the televised KUSI News February 8th, 2019:

<https://www.kusi.com/how-to-get-your-taxes-done-for-free/>

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

Senator Ben Hueso included EITC in his February newsletter, and tweeted a link to the e-newsletter:

<https://twitter.com/SenBenHueso/status/1100915493370658818>

Collateral Messaging

Category	Metrics
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Target Area	2-San Diego
Reporting Period	February 1, 2019 - February 28, 2019

Number of Flyers/Brochures Distributed	
Number of New Individuals who Received Direct Mailers	855

Narrative of Expenditures in EARS and Outreach Activities

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

Child Development Associates: \$395.06
 Dreams For Change: \$1,292.21
 ElderHelp: \$500.00
 International Rescue Committee: \$225.00
 YMCA Childcare Resource Service: \$4,236.00

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

2-1-1 provided flyers and posters to all subcontractors who continue to distribute them during their outreach efforts.

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

2-1-1 distributed 855 combined e-mails and direct mailers with CalEITC, EITC, and VITA flyers to clients who completed a CalFresh application with the Enrollment Center during February. Although we've exceeded our goal of 1,500, we will continue to send e-mails and direct mailers to clients who complete a CalFresh application with our Enrollment Center in March.

CDA mailed 800 flyers in February, and ElderHelp mailed 400. IRC mailed 2,936 and distributed 4,207 flyers. YMCA distributed 432 flyers and mailed 39,246. Dreams for Change distributed 1,505 flyers at two events.

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

CDA conducted a Facebook and e-mail blast campaign on Tax Day 3/2/19.

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	92113	02/06/19	150	No
Community Gathering	92115	02/20/19	20	No
Community Gathering	92113	02/21/19	25	No
Community Gathering	92103	02/25/19	20	No

Target Area	2-San Diego			
Reporting Period	February 1, 2019 - February 28, 2019			

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 February, reaching 215 individuals; 1 of which took place in targeted zip codes.

2-1-1 San Diego outreach presentations at meetings:
Presentation staff: 16 presentations = 2.67 hours x \$22.95 per hour = \$61.28

2-1-1 San Diego Community Booths:
Outreach Staff: 15 hours x \$24.30 per hour = \$364.50

Dreams for Change: \$1,292.21
YMCA Childcare Resource Service: \$280.00

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:
2/6/2019 - Community Outreach Event at "Farm to Family Fair" (150 attendees)
2/20/2019 - Fresh Start Showers Program (20 attendees)
2/21/2019 - Outreach Presentation (25 attendees)
2/25/2019 - Fresh Start Showers Program (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:

2-1-1 also provided partner education to 16 partner meetings taking place at 2-1-1's Connections Center, reaching 411 community partners:

2/5/2019 - SD County - Behavioral Health Provider Collaborative Meeting (45 attendees)

Target Area	2-San Diego
Reporting Period	February 1, 2019 - February 28, 2019
<p>2/7/2019 - CHIP - Community Conversation (30 attendees) 2/7/2019 - SD ACH - Collective Action Workgroup (20 attendees) 2/8/2019 - SD County - Medical Directors Meeting (30 attendees) 2/8/2019 - SD County - Adult Council Program Manager Workgroup (25 attendees) 2/12/2019 - Legal Aid - Housing Provider Training (15 attendees) 2/12/2019 - SD ACH - Stewardship Group (15 attendees) 2/13/2019 - YMCA - Agency Training (18 attendees) 2/14/2019 - YMCA - YAA Cluster (13 attendees) 2/14/2019 - SD County - Ad Hoc Program Managers Meeting (40 attendees) 2/15/2019 - YMCA - Executive Directors Meeting (35 attendees) 2/26/2019 - YMCA - Child Resource Services (15 attendees) 2/26/2019 - SD Coalition - Mental Health Meeting (25 attendees) 2/27/2019 - SD County - Older Adult Council Meeting (40 attendees) 2/27/2019 - CHIP - RLA Council Meeting (25 attendees) 2/28/2019 - Be There SD - Data & Metrics Workgroup (20 attendees)</p> <p>YMCA also attended 5 outreach events where they promoted CalEITC outreach and education, reaching 75 individuals. Dreams for Change attended two outreach events, reaching 190 individuals.</p>	
Other	
Category	Actual (#)
Recording Played to Callers	36,468
Narrative of Expenditures in EARS and Outreach Activities	
<p>The following automated recording remained on the IVR for incoming calls in February:</p> <p><i>“Did you know that households with less than \$55,000 annual income may qualify for free tax preparation assistance, and could also collect up to thousands of dollars of Earned Income Tax Credits? Be sure to ask your representative for more information or visit our website, 211sandiego.org”</i></p> <p>A total of 52,970 callers have heard this message during this contract term, exceeding our target of 50,000. Despite exceeding this goal, the message will remain in our IVR until at least the end of tax season.</p> <p>Message Recording billable costs: \$0 this month</p>	

Target Area	2-San Diego
Reporting Period	February 1, 2019 - February 28, 2019

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Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

A challenge in February was that we have received a higher volume of tax calls this season than we have experienced in previous years. Our combined efforts are resulting in more people calling 2-1-1 to access this important information, and we have had to adjust our staffing to handle the additional volume.

On February 11th, the TaxSlayer software used at the VITA sites was unavailable. This prompted additional calls to 2-1-1 from clients who were at their appointments and had to reschedule their appointment because it could not be completed. When we noticed this additional call volume, we reached out to the VITA site coordinator and requested each VITA site to communicate directly with their own clients to reschedule the appointment. They were able to get the appointments rescheduled and the rest of the month it worked as expected.

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:

Target Area	2-San Diego
Reporting Period	February 1, 2019 - February 28, 2019

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Koreatown Youth and Community Center
Grantee Representative	Gabrielle Maestas
Telephone Number	(213) 365-7400
Email Address	gmaestas@kyccla.org
Contract Number	18T-8003
Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019

Web	
Category	Metrics
EITC Website Hits	7,916

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$2,508.86 for administrering web activity.

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.

The Free Tax Prep LA website (www.freetaxprepla.com) was listed in all outreach material (bus benches, transporation shelters, wall ads, banners, flyers, press release/press event, and on partner website). and gathered over **6,500** visits. The site includes updated tax season locations and times, links to online booking, and contact information for over **30** VITA locations.

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 partners include the Mayor of Los Angeles, Eric Garcetti, created a webpage (<https://www.lamayor.org/FreeTaxPrep>) with information about EITC, CalEITC, and Free Tax Prep LA. It includes several videos in English and Spanish. The videos also connect families to local LAUSD schools where special tax preparation days have been scheduled. The page links to www.freetaxprepla.com.

Also, City of Los Angeles Controller Ron Galperin, United Way of Greater Los Angeles, LA County Department of Business and Consumer Affairs, City of Los Angeles Housing, Community and Investment

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>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.</p>	

Social Media

Number of Facebook Posts	307	Number of Tweets	326
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>Are you driving Uber or Lyft to make ends meet? You may be eligible for the #CalEITC credit, worth up to \$2,879! Check your eligibility at Cal EITC 4 Me.</p>		<p>FreeTaxPrepLA is going back to school. Many Free Tax Prep events scheduled at several #LAUSD schools. Here is a complete list of dates and locations: https://www.lamavor.org/FreeTaxPrep</p>	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
78		<p>Thank you to univision34 for providing us a platform to announce EITC and free tax services.</p>	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$2,508.86 for administrering social media activity.

2) Provide a narrative of education and outreach activities conducted during the month under social media: Social media calendars were sent to subagencies including a link to Dropbox photos to use in social media posts. Social media messaging this month was focused on qualifications for eligibilty regarding the Federal and State EITC as well as EITC facts and figures. A total of **711** social media posts went out this month.

Social media calendars were developed and shared with subagencies. Social media calendars were also translated into English, Chinese, and Spanish. The January social media messages focused on information on the expanded EITC, VITA success stories, and VITA services. Additionally, an abbreviated social media calendar was developed to share with partners , like elected officials and government agencies. Twitter had **62,000** impressions and Facebook had **22,704** organic impressions.

Subagencies collect photos and video testimonies of their clients or feature Free Tax Prep LA or Cal EITC logo. We collect these photos and upload them to the shared Dropbox so subagencies can use for their own agency social media messages. This helps the outreach on social media be more cohesive and relateable to imagery.

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, United Way of Greater Los Angeles, and First 5 Los Angeles. Messages and graphics are also shared with fellow grantee Youth Policy Institute and includes content created by CalFITC4me and United Way of California.

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
and includes content created by CalEITC and United Way of California.	

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1,244
Canvassing in Non-Targeted Zip Codes	910
New Individuals Who Received Text Messages	3,747
Phone Calls	1,643
Office Visits	1,843

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: \$2,508.86 for administrering canvassing activity and \$257 for canvassing activities. Total \$2,765.86 for all canvassing activities.

- 2) Provide broad overview of canvassing for targeted zip codes: subagencies sent reminder texts to clients that the EITC was available to those making less than \$55,000 and that free tax services were avialable at their center at information at www.freetaxprepla.com. Other agencies focused on alerting their clients about Mega Tax Day events. Over **1,200** text messages were sent to individuals living in targeted zip codes. Messages were sent in English and Spanish.

- 3) Provide a broad overview of canvassing for non-targeted zip codes: Subagencies covered low-income housing buildings that are operated by, or already served by the agency. Subagencies sent reminder texts to clients that the EITC was available to those making less than \$55,000 and that free tax services were avialable at their center at information at www.freetaxprepla.com. Other agencies focused on alerting their clients about Mega Tax Day events. There was a total of **910** interactions

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>agencies focused on alerting their clients about Mega Tax Day events. There was a total of 910 interactions in non-targeted zip code areas.</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: We utilized the service "Simple Texting" to send out customized messages for each of the Family Source Centers. We coordinated a message specific to their location and sent out over 3,747 texts to the numbers they provided. We were able to send messages out in English and in Spanish. Messages were sent to clients enrolled at the subagency and may have already used a service from them before. All text recipients provided consent last year to receive text messages.</p> <p>5) Provide broad overview of Phone Calls conducted: Customers listen to a recorded message about services, EITC, and how to qualify. There are over 1,000 callers in English, Korean, and Spanish that listen to the recording within the month of February.</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>	

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	220	25,000		
Internet/Website Ads				
Social Media Promoted/Boosted Ads	92	46,000		

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost: \$2,508.86 for administrering media activity.
- 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:

100,000 impressions/4 weeks = 25,000 times the number of ads (220) or 5,500,000 impressions in the first month.

Wall ads (**92**) also went up. The ads are in low-income zip codes at convenient store, gas stations, and check cashing stores with street and foot traffic.

Wall Ads

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
<p>2,000 impressions/4 weeks = 500 times the number of ads (92) or 46,000 impressions.</p> <p>3) Provide information on whether or not any earned media obtained during the month: N/A</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: N/A</p>				
Collateral Messaging				
			Category	Metrics
			Number of Flyers/Brochures Distributed	5,097
			Number of New Individuals who Received Direct Mailers	500
Narrative of Expenditures in EARS and Outreach Activities				
<p>1) List the various activity-expenditures charging for this month and their cost: 2,508.85 for administrering collateral activity and another \$8,903.74 for printing. Total \$11,412.59 for collateral messaging.</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: Over 5,597 pieces of collateral were disseminated at subagencies (at the center or at community events). All new clients undergo a screening process and recieve information about free tax services. More so, clients receive the information at agency workshops, trainings, enrollments, and giveaways. Nearly \$9,000 was spent on the design and print collateral: banners, signage, flyers, transportation ads, etc.</p> <p>3) Provide a listing and narrative of direct mailers that went out: Direct mailers go out to clients to remind them to make an appointment at a VITA tax site. The mailers reached 500 individuals.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A</p>				
Group Events				
			Total Number of Events Held During the Reporting Period	57
Location	Zip Code	Date	Attendance	Press at Event?
Educational Forum	90249	02/02/19	37	No
Educational Forum	90021	02/22/19	17	No

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
Free Tax Prep	90032	02/02/19	50	No
Free Tax Prep	90032	02/16/19	50	No
Health Care Clinic	90032	02/02/19	40	No
Educational Forum	90044	02/07/19	10	No
School	90047	02/15/19	5	No
Educational Forum	90008	02/15/19	8	No
Community Gathering	90044	02/22/19	15	No
School	90032	02/01/19	25	No
School	90032	02/06/19	12	No
School	90031	02/07/19	9	No
School	90032	02/08/19	15	No
Community Gathering	91801	02/09/19	2000	No
Educational Forum	91770	02/12/19	21	No
Educational Forum	91754	02/14/19	13	No
Mega Event	91007	02/16/19	2500	No
Mega Event	91007	02/17/19	1800	No
Community Gathering	90032	02/26/19	10	No
Free Tax Prep	90033	02/09/19	74	No
Free Tax Prep	90023	02/23/19	83	No

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
Educational Forum	90004	02/06/19	100	No
School	91601	02/13/19	20	No
Resource Fair	90003	02/22/19	200	No
Resource Fair	90037	02/23/19	90	No
School	90047	02/26/19	100	No
Community Gathering	90010	02/27/19	30	No
Community Gathering	90059	02/06/19	178	No
Free Tax Prep	90001	02/13/19	18	No
Community Gathering	90059	02/26/19	228	No
Community Gathering	90059	02/01/19	125	No
Free Tax Prep	90731	02/05/19	30	No
Community Gathering	90501	02/06/19	20	No
Community Gathering	90744	02/07/19	35	No
Free Tax Prep	90731	02/07/19	24	No
Free Tax Prep	90731	02/09/19	22	No
Church	90744	02/09/19	20	No
Free Tax Prep	90731	02/12/19	34	No
Free Tax Prep	90731	02/14/19	24	No
Free Tax Prep	90731	02/19/19	24	No

Target Area	1-Los Angeles			
Reporting Period	January 1, 2019 - January 31, 2019			
School	90744	02/20/19	15	No
Free Tax Prep	90731	02/21/19	38	No
Church	90744	02/25/19	27	No
Free Tax Prep	90731	02/26/19	24	No
School	90744	02/28/19	27	No
Free Tax Prep	90731	02/28/19	18	No
Resource Fair	91303	02/09/19	250	No
Free Tax Prep	90011	02/22/19	25	No
School	90005	02/11/19	18	No
School	90004	02/04/19	55	No
School	90020	02/01/19	100	No
Library	90029	02/19/19	100	No
Mega Event	90017	02/13/19	300	Yes
Mega Event	90020	02/21/19	15	Yes
Free Tax Prep	90020	02/27/19	15	Yes
Mega Event	90045	02/21/19	20	Yes
Community Gathering	90004	02/23/19	50	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity expenditures charging for this month and their costs as of 06/01/19

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost: 2,508.86 for administrering media activity and \$5,000 for outreach activities. Total expenses for outreach activities: 7,508.86.</p> <p>2) Provide a brief overview of events conducted during the reporting period: Free Tax Prep LA had it's press event with Mayor Garcetti in which the word was spread about tax prep events that will be held at LAUSD schools. This was hosted in Spanish and English and had about 300 attendees. KYCC had its own press event to advertise our free tax prep services; this was hosted in Korean and English. All subagencies provide tax prep services, select agencies prepared taxes at low-income housing buildings and at LA Unified School District schools where staff and families were affected by the teachers strick in the month of February. There were also several several education forums or information sessions (fincial aid workshops, immigration, tenant rights, health, etc.) in which workshops at subagencies to advertise free tax prep services to the communities that they serve.</p> <p>3) If members of the press attended an event, indicate which press outlets: This month held the FTPLA Press Event with the Mayor of Los Angeles, Eric Garcetti. In addition to holding tax preperation appointments, Mayor Garcetti spoke through the cameras to viewers at home about where they can get their taxes prepared and what credits they can benefit from. A total of seven news outlets covered the event including Estrella TV, Power 106 Jason Cruz Show, KNX Radio, KVEA-Telemundo, Telemundo.com, The Hub Blog, and La Opinion. It is estimated to reach 4 million viewers, readers, etc. (See attached Media Coverage).</p> <p>Univision hosted a 5 hour telethon regarding free tax services. Viewers called in to have tax questions answered. The event was attended and branded as Free Tax Prep LA event. Live coverage between commercial breaks and the evening news at 5pm and 10pm. It is estimate to reach the 134,000 evening viewers. This event was also supported by fellow grantee, Youth Policy Institute. https://www.facebook.com/pg/Univision34/videos/?ref=page_internal (2/19/19)</p> <p>Korean language media VITA Press Conference at Koreatown Youth and Community Center on 2/21 to highlight the tax services we provide to the community. All Korean language news outlets were present to cover the event. and it is estimated to reach 350,000 Korean Americans living across Southern California (See attached Media Coverage).</p> <p>Also, KBS America(Korean Language Channel) hosted an live VITA news cast at Koreatown Youth and Community Center. on 2/27 They interviewed staff and a client . The coverage reached an estimated 40,000 Korean Americans living in Los Angeles , Orange County, and the inland empire. (See attached Media Coverage). https://www.facebook.com/KBSAmericaNews/videos/787479904959872/</p> <p>Outreach activities include the fee for our Media/Public Relations Consultant is \$5,000.</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	January 1, 2019 - January 31, 2019
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
Type Text Here	
Narrative of Success Stories	
Success Story #1	

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>Success Story #1</p> <p>Date of Success Story: Feb 2019 Name of Person from Success Story: Ms. Acuna Zip-Code Where Person Lives: 90032 VITA Site where person got taxes done (if applicable): Barrio Action Narrative: Ms. Acuna, a single mother of 3 children, is excited that her son was accepted into Cal State University Los Angeles. He is her oldest and the first in the family to go to college. She plans to use her tax return to purchase her son a laptop for school as well as purchase plane tickets for her entire family to visit her homeland in El Salvador.</p> <p>Success Story #2</p> <p>Date of Success Story: Feb 2019 Name of Person from Success Story: Anonymous Family Zip-Code Where Person Lives: 90033 VITA Site where person got taxes done (if applicable): El Centro de Ayuda Narrative: A family who was not filing taxes because they were below the filing threshold heard from a friend about the free tax preparation program. They came into our office and were able to file tax years 2016, 2017, and 2018 which provided a combined refund for the family to pay off their debt totaling in \$6,000 and have additional refund money for their savings account. Free Tax Preparation for this family also prompted the oldest child who is attending her third year at Mount Saint Mary's University to volunteer with the VITA program. She passed her certifications at the end of February and is excited to educate the community on the benefits of free tax preparation in March.</p> <p>Success Story #3</p> <p>Date of Success Story: Feb 2019 Name of Person from Success Story: Anonymous Family Zip-Code Where Person Lives: 90020 VITA Site where person got taxes done (if applicable): KYCC Narrative: During a quality review of a client's return, the client's mother informed me that it was the first time her teenage daughter filed her taxes. The client's mother and grandmother were present for the special occasion. The mother and grandmother had prepared their taxes with KYCC, and the mother was proud that her teenage daughter was the newest generation to start filing taxes with KYCC. The three generations will together to purchase new furniture for their home.</p>	

Target Area	1-Los Angeles
Reporting Period	January 1, 2019 - January 31, 2019
<p>Success Story #4 Date of Success Story: Feb 2019 Name of Person from Success Story: Albert Hernandez Zip-Code Where Person Lives: 90247 VITA Site where person got taxes done (if applicable): The client was watching Univision 34 newscast during the Free Tax Prep LA coverage (Phone bank and information session) about his debt with the IRS. Mr. Hernandez spoke to Koreatown Youth and Community Center's tax lawyer about his situation (his boss was filng his taxes for him and he never received any credits for his children). The tax lawyer is taking onthe case to reverse any wrongdoing. Univision is looking forward to a post interview once the case is resolved.</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-8002
Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

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

Social Media

Number of Facebook Posts	5	Number of Tweets	5
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
We had an awesome time today in in Lancaster! More than 50 people showed up to get their taxes done for FREE. Thank you to our partners Mexican American Opportunity Foundation (MAOF) Senator Scott Wilk Assemblyman Tom Lackey Antelope Valley Partners for Health for making the event such a success.		SPOTTED: Check out the bus shelter ad campaign being run by our partner @FreeTaxPrepLA! Get your taxes filed for free, and make sure to find out if you qualify for the #CalEITC and federal #EITC cash back refunds: https://caleitc4me.org/earn-it/ #TaxSeason #TaxRefund #FreeTaxPrepLA	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		N/A	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

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

Social media costs covered through statewide Grant funds

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:

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	0
Canvassing in Non-Targeted Zip Codes	2047
New Individuals Who Received Text Messages	122,750
Phone Calls	
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

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

- Texting Management: \$1875 (\$75/H for 25 hours)
- Texting Organizers: \$2000 (Contractors)
- Program Director: \$6000 (GSO Staff Salary)
- Grassroots Organizer: \$2,000 (GSO Staff Salary)

Canvassing Total: \$11,875

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

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

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

Interactions at Events

Organization Name (where service was performed)	Event Date (Month/Date/Year)	Name of Activity (tax event, outreach event, etc)	Address	City	Zip Code	Hours (ex. 12-2 pm)	Projected Number of Outreach, Education, Tax Preparation Assistance at event
TOBERMAN	02/05/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
NORMANDEALE PARK	02/08/2019	OUTREACH	2400 HALDALE AVE	TORRANCE	90501	2-8PM	20
WILMINGTON SENIOR CENTER	02/07/2019	OUTREACH	1371 EUBANK AVE	WILMINGTON	90744	11AM-1PM	35
TOBERMAN	02/07/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
TOBERMAN	02/09/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	9AM-1PM	
PROVIDENCE LITTLE CO OF MARY	02/11/2019	OUTREACH	470 HAWAIIAN AVE	WILMINGTON	90744	9AM-1PM	20
TOBERMAN	02/12/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
TOBERMAN	02/14/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
TOBERMAN	02/19/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
WILMINGTON MIDDLE SCHOOL	02/20/2019	OUTREACH	1700 GULF AVE	WILMINGTON	90744	9AM-2PM	15
TOBERMAN	02/21/2019	TAX EVENT	131 N GRANFD AVE	SAN PEDRO	90731	4-8PM	
PROVIDENCE LITTLE CO OF MARY	02/25/2019	OUTREACH	470 HAWAIIAN AVE	WILMINGTON	90744	9AM-1PM	27
TOBERMAN	02/28/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
YMCA Maywood	02/08/2019	Tax Event	4801 58th St.	Maywood	90270	8 AM - 5PM	50
MAOF Headquarters	02/09/2019	Tax Event	401 Garfield Ave.	Montebello	90840	8 AM - 5PM	75
South Gate Library	02/15/2019	Tax Event	4035 Tweedy Blvd.	South Gate	90280	8 AM - 5PM	47
Huntington Park Library	02/18/2019	Tax Event	8518 Miles Ave.	Huntington Park	90255	8 AM - 5PM	51
Kranz School	01/24/2019	Outreach Event	12460 Fineview Ave	El Monte	91731	8-9am	13
Mountain View School District	01/25/2019	Outreach Event	3320 Gilman Rd.	El Monte	91731	8-10am	10
Jeff Seymour Family Center	02/04/2019	outreach event	10900 Mulhall	El Monte	91731	7-45am-9am	18
south gate high school	02/18/2019	outreach event	3351 firestone blvd	south gate	90280	10 -2	27
Barrio Action	02/09/2019	Super Saturday	4927 Huntington Drive N.	Los Angeles	90032	9-3pm	28
Barrio Action	02/23/2019	Super Saturday	4927 Huntington Drive N.	Los Angeles	90032	9-3pm	25
EastSide Union School District	02/01/2019	Parent University	44820 N. 27th E.	Lancaster	93535	8:30am-10:00M	80
EastSide Union School District	02/09/2019	Lego Fun Day	44820 N. 27th st E	Lancaster	93535	9:30am-11:00am	100
AVFH and City of Lancaster	02/28/2019	Winner's Circle Celebration	44228 10ht st west	Lancaster	93534	5:30-7:30PM	80
Antelope Valley Hospital	02/09/2019	5th Annual Women's Heart Affair	44151 15th street west	Lancaster	93534	9:00am-12:00pm	100
Palmdale District DELAC Meeting	02/19/2019	DELAC		Palmdale		9:00am-11:00am	50
Grace Resource Center	02/14/2019	Homeless Connect Day		Lancaster	93534	1:00pm-3:00pm	110
Crochet For a Cause Homeless Cafe	02/23/2019		17213 Lake Los Angeles,	Lake Los Angeles	93591		
Christ's Church of the Valley	02/23/2019	Snow Daze Festival	2717 East Avenue R	Palmdale	93550	9-1PM	200
MAOF	01/12/2019	Tax Prep Volunteer Training	2130 E 1st Street	Los Angeles	90033	9am-3pm	50
LA County Department of Consumer and Bus	02/09/2019	Taz Event	133 N Sunol Dr	Los Angeles	90063	9am-4pm	100
							1329

Interactions at Presentations

Organization Name	Date of Presentation	Presenter	City	Audience (students, parents, members, etc)	Language(s)	# of Interactions
Dispensing Dynamics	2/11/2019	Brenda Contreras/ Susy Contre	Los Angeles	Community	English/Span	16
A Place Called Home	2/12/2019	Monica Vargas/ Raul De La O	Los Angeles	Students		18
Citizenship Forum	2/23/2019	Brenda Contreras/ Susy Contre	Huntington Park	Community	English/Span	28
A Place Called Home	2/28/2019	Monica Vargas/ Raul De La O	Los Angeles	Students		
Mountain View School District	02/07/2019	El Monte Promise Foundation	El Monte	Community Liaison	English	18
Albion Elementary	2/15/19	Francisco Valenzuela	Los Angeles	parents	English/Spanis	18
Albion Elementary	2/21/19	Francisco Valenzuela	Los Angeles	parents	English/Spanis	14
Albion Elementary	2/27/19	Francisco Valenzuela	Los Angeles	parents	English/Spanis	8
Antelope Valley Partners for Health	02/08/2019	Rocio Castellanos	Lancaster	Stackholders	English	17
ELACC	1/15/2019	Rosa	Los Angeles	Community Memb	Spanish	7
ELACC	01/28/2019	Rosa/Emma/Cindy	Los Angeles	Community Memb	Spanish/Englis	30
ELACC	1/22/19	Rosa	Los Angeles	Community Memb	Spanish	7
ELACC	1/29/2019	Rosa	Los Angeles	Community Memb	Spanish	6
MENDEZ HIGH SCHOOL	02/13/2019	tania barrios	LOS ANGELES	parents	espanol	17
					Total	202

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

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

sent:

Total number of texts sent to LA county contacts: 122,750

Treatment 1: Basic Informational Message + Link

Hi-this is ____ 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 Visit caleitc4me.org/CashBack to learn more about your eligibility and to claim your EITC refund.

Treatment 2: Promote Hotline

Hi-this is _____, 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. Call 211 to get free help with filing your return and to claim your EITC refund.

Treatment 3: Offer Text-based Assistance

Hi-this is _____ 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. Text "yes" and I can help you claim your EITC refund.

Treatment 4: Benefit Value

Hi-this is _____, 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. Eligible families got back an average of \$2,000 last year. Text "yes" and I can help you claim your EITC refund.

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:

Media				
Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads				
Public Services Announcements (Radio)				
Paid Television Ads				

Target Area	1-Los Angeles			
Reporting Period	February 1, 2019 - February 28, 2019			
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads	6	77,189	0	0

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
- Facebook Ads: \$14,450
 Consultant Monthly Retainer: \$637.50
Media Total: 15,087.50
- 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:
- Please see attached PDF for example of Ads to be placed on Facebook.**
- 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:

Collateral Messaging

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019
Category	Metrics
Number of Flyers/Brochures Distributed	146,000
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:

Costs for collateral messaging already covered last month.

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

Eligibility Chart: 56,000
 Benefits Checklist: 80,000
 Self-Employed Postcard: 5,000
 Older CAEligibility Chart: 5,000

Total: 146,000

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:

N/A

Group Events

Total Number of Events Held During the Reporting Period			34	
Location	Zip Code	Date	Attendance	Press at Event?
Free Tax Prep	90731	02/05/19	30	No
Community Gathering	90501	2/6/2019	20	NO
Resource Fair	90744	02/07/19	35	No
Free Tax Prep	90731	02/17/19	24	No

Target Area	1-Los Angeles			
Reporting Period	February 1, 2019 - February 28, 2019			
Free Tax Prep	90731	02/09/19	22	No
Church	90744	02/11/19	20	No
Free Tax Prep	90731	02/14/19	34	No
Free Tax Prep	90731	02/12/19	24	No
Free Tax Prep	90731	02/19/19	24	No
School	90744	02/20/19	15	No
Free Tax Prep	90731	02/26/19	28	No
Church	90744	2/25/2019	27	No
Free Tax Prep	90731	2/26/2019		No
Free Tax Prep	90270	2/8/2019	50	No
Free Tax Prep	90640	2/9/2019	75	No
Free Tax Prep	90280	2/15/2019	47	No
Free Tax Prep	90255	2/16/2019	51	No
Community Gathering	91731	1/24/2019	13	No
Resource Fair	91731	1/25/2019	10	No
Resource Fair	91731	2/4/2019	16	No
Resource Fair	90280	2/16/2019	27	No
Resource Fair	90032	2/9/2019	28	No
Resource Fair	90032	2/23/2019	25	No
Free Tax Prep	93535	2/1/2019	80	No
Free Tax Prep	93535	2/9/2019	100	No
Free Tax Prep	93534	2/26/2019	80	No
Free Tax Prep	93534	2/9/2019	100	No
Resource Fair		2/19/2019	50	No
Community Gathering	93534	2/14/2019	110	No
Community Gathering	93591	2/23/2019		No
Community Gathering	93550	2/23/2019	200	No
Educational Forum	90033	1/12/2019	50	No
Free Tax Prep	90063	2/9/2019	100	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activities, expenditures, charging for this month and their cost.

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

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

Event Management: \$4,125 (GSO Staff Salary)

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

Organization Name (where service was performed)	Event Date (Month/Date/Year)	Name of Activity (tax event, outreach event, etc)	Address	City	Zip Code	Hours (ex. 12-2 pm)	Projected Number of Outreach, Education, Tax Preparation Assistance at event
TOBERMAN	02/05/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
NORMANDEALE PARK	02/08/2019	OUTREACH	2400 HALLDALE AVE	TORRANCE	90501	2-8PM	20
WILMINGTON SENIOR CENTER	02/07/2019	OUTREACH	1371 EUBANK AVE	WILMINGTON	90744	11AM-1PM	35
TOBERMAN	02/07/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
TOBERMAN	02/09/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	9AM-1PM	
PROVIDENCE LITTLE CO OF MARY	02/11/2019	OUTREACH	470 HAWAIIAN AVE	WILMINGTON	90744	9AM-1PM	20
TOBERMAN	02/12/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
TOBERMAN	02/14/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
TOBERMAN	02/19/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
WILMINGTON MIDDLE SCHOOL	02/20/2019	OUTREACH	1700 GULF AVE	WILMINGTON	90744	9AM-2PM	15
TOBERMAN	02/21/2019	TAX EVENT	131 N GRANFD AVE	SAN PEDRO	90731	4-8PM	
PROVIDENCE LITTLE CO OF MARY	02/25/2019	OUTREACH	470 HAWAIIAN AVE	WILMINGTON	90744	9AM-1PM	27
TOBERMAN	02/26/2019	TAX EVENT	131 N GRAND AVE	SAN PEDRO	90731	4-8PM	
YMCA Maywood	02/08/2019	Tax Event	4801 58th St.	Maywood	90270	8 AM - 5PM	50
MAOF Headquarters	02/09/2019	Tax Event	401 Garfield Ave.	Montebello	90640	8 AM - 5PM	75
South Gate Library	02/15/2019	Tax Event	4035 Tweedy Blvd.	South Gate	90280	8 AM - 5PM	47
Huntington Park Library	02/16/2019	Tax Event	6518 Miles Ave.	Huntington Park	90255	8 AM - 5PM	51
Kranz School	01/24/2019	Outreach Event	12460 Fineview Ave	El Monte	91731	8-9am	13
Mountain View School District	01/25/2019	Outreach Event	3320 Gilman Rd.	El Monte	91731	8-10am	10
Jeff Seymour Family Center	02/04/2019	outreach event	10900 Mulhall	El Monte	91731	7:45am-9am	16
south gate high school	02/18/2019	outreach event	3351 firestone blvd	south gate	90280	10 -2	27
Barrio Action	02/09/2019	Super Saturday	4927 Huntington Drive N.	Los Angeles	90032	9-3pm	28
Barrio Action	02/23/2019	Super Saturday	4927 Huntington Drive N.	Los Angeles	90032	9-3pm	25
EastSide Union School District	02/01/2019	Parent University	44820 N. 27th E.	Lancaster	93535	8:30am-10:00M	80
EastSide Union School District	02/09/2019	Lego Fun Day	44820 N. 27th st E	Lancaster	93535	9:30am-11:00am	100
AVPH and City of Lancaster	02/26/2019	Winner's Circle Celebration	44226 10ht st west	Lancaster	93534	5:30-7:30PM	80
Antelope Valley Hospital	02/09/2019	5th Annual Women's Heart Affair	44151 15th street west	Lancaster	93534	9:00am-12:00pm	100
Palmdale District DELAC Meeting	02/19/2019	DELAC		Palmdale		9:00am-11:00am	50
Grace Resource Center	02/14/2019	Homeless Connect Day		Lancaster	93534	1:00pm-3:00pm	110
Crochet For a Cause Homeless Cafe	02/23/2019		17213 Lake Los Angeles.	Lake Los Angeles	93591		
Christ's Church of the Valley	02/23/2019	Snow Daze Festival	2717 East Avenue R.	Palmdale	93550	9-1PM	200
MAOF	01/12/2019	Tax Prep Volunteer Training	2130 E 1st Street	Los Angeles	90033	9am-3pm	50
LA County Department of Consumer and Bus	02/09/2019	Taz Event	133 N Sunol Dr	Los Angeles	90063	9am-4pm	100
							1329

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

Other

Category	Actual (#)
Sub-Grants	

Narrative of Expenditures in EARS and Outreach Activities

Other 1: Sub-Grants - \$38,000

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

First sub grant awarded to Mexican American Opportunity Foundation (MAOF). They will receive the second installment for their grant in February for \$19,000. First installment paid in December.

Second Sub grant awarded to East LA Community Corporation (ELACC). They will receive the second installment for their grant in February for \$19,000. First installment paid in December

Grantees will be utilizing funds to support texting program and host events throughout the region.

Other 2: GSO Admin **\$ 5,375.00**

GSO admin costs are general operations including completing progress reports, managing grant budgets, rent space, maintaining partner relationships, and conducting weekly meetings..

Challenges and Success Stories
Challenge(s) Faced During the Reporting Period

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

Managing man events all happening at once with limited staff. It is also difficult to manage texting program with such a high volume of texts being sent out daily!

Narrative of Success Stories

We are gathering success stories from our events, but there are none to report as of now. We will report our success stories in the upcoming months!

Target Area	1-Los Angeles
Reporting Period	February 1, 2019 - February 28, 2019

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8002	Report Period: 2/1/19 - 2/28/19	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	11,875.00
4. Media	15,087.50
5. Collateral Messaging	.00
6. Group Events	4,125.00
7. Other 1	38,000.00
8. Other 2	5,375.00
Total	74,462.50

20 - TOTAL COSTS

1. Total Costs	74,462.50
Total	74,462.50

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:
03/22/2019

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: 2/1/19 - 2/28/19	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	7,535.00
4.	Media	20,536.25
5.	Collateral Messaging	13,561.56
6.	Group Events	4,465.00
7.	Other 1	15,000.00
8.	Other 2	.00
	Total	61,097.81
20 - TOTAL COSTS		
1.	Total Costs	61,097.81
	Total	61,097.81

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):
Josh Fryday / President

Signature:

Date:
03/22/2019

CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8011	Report Period: 2/1/19 - 2/28/19	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	9,335.00 ✓
4. Media	13,425.00
5. Collateral Messaging	.00
6. Group Events	4,665.00
7. Other 1	15,000.00
8. Other 2	.00
Total	42,425.00

20 - TOTAL COSTS

1. Total Costs	42,425.00
Total	42,425.00

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:
03/22/2019

CSD ACCOUNTING USE ONLY

Payment: _____ PCA# _____

Approved By: _____ Date: _____

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn	Contract Number: 18T-8017	Report Period: 2/1/19 - 2/28/19	Adjustment: 0
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Prepared by (Name/Title): Sebastien Chaubard / Associate	E-mail Address: sebastien@goldenstateopportunity.org	Telephone: 510-468-0872-	Fax Number: n/a
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10 - EDUCATION AND OUTREACH ACTIVITIES

1.	Web	4,500.00
2.	Social Media	6,422.00
3.	Canvassing	4,500.00
4.	Media	26,625.00
5.	Collateral Messaging	5,340.29
6.	Group Events	.00
7.	Other 1	5,000.00
8.	Other 2	3,578.00
Total		55,965.29
20 - TOTAL COSTS		
1.	Total Costs	55,965.29
	Total	55,965.29

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:
03/22/2019

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: 2/1/19 - 2/28/19	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	3,875.00
4.	Media	21,875.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	.00
8.	Other 2	625.00
Total		26,375.00

20 - TOTAL COSTS

1.	Total Costs	26,375.00
Total		26,375.00

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:
03/22/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Koreatown Youth & Comm Ctr Inc		Contract Number: 18T-8003	Report Period: 2/1/19 - 2/28/19	Adjustment: 0
Prepared by (Name/Title): Lidia Sebastian / Cal EITC Program Monitor		E-mail Address: lsebastien@kyccla.org	Telephone: 213-365-7400 ex	Fax Number: 213-909-1975
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		2,508.86	
2.	Social Media		2,508.86	
3.	Canvassing		2,765.86	
4.	Media		2,508.86	
5.	Collateral Messaging		11,412.59	
6.	Group Events		7,508.85	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			29,213.88
20 - TOTAL COSTS				
1.	Total Costs			29,213.88
	Total			29,213.88
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): Audrey Casillas / Economic Development Coordinator		Signature:		Date: 03/20/2019
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: 2/1/19 - 2/28/19	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	1,000.00		
2.	Social Media	500.00		
3.	Canvassing	14,000.00		
4.	Media	20,262.86		
5.	Collateral Messaging	520.07		
6.	Group Events	5,133.55		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	41,416.48		
20 - TOTAL COSTS				
1.	Total Costs	41,416.48		
	Total	41,416.48		
<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: 03/20/2019	
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: 2/1/19 - 2/28/19	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			925.89
2.	Social Media			9,587.20
3.	Canvassing			51,325.76
4.	Media			2,467.31
5.	Collateral Messaging			2,627.74
6.	Group Events			20,676.87
7.	Other 1			.00
8.	Other 2			.00
Total				87,610.77
20 - TOTAL COSTS				
1.	Total Costs			87,610.77
Total				87,610.77
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: 03/29/2019
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: 2/1/19 - 2/28/19	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		429.88	
2.	Social Media		4,451.20	
3.	Canvassing		11,906.96	
4.	Media		1,145.54	
5.	Collateral Messaging		1,015.43	
6.	Group Events		5,065.81	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			24,014.82
20 - TOTAL COSTS				
1.	Total Costs			24,014.82
	Total			24,014.82
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: 03/19/2019	
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: 2/1/19 - 2/28/19	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	1,197.34	
2.	Social Media	5,100.80	
3.	Canvassing	8,807.76	
4.	Media	9,155.50	
5.	Collateral Messaging	1,508.20	
6.	Group Events	4,714.92	
7.	Other 1	.00	
8.	Other 2	.00	
	Total		30,484.52
20 - TOTAL COSTS			
1.	Total Costs		30,484.52
	Total		30,484.52

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:

03/19/2019

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: 2/1/19 - 2/28/19	Adjustment: 0
Prepared by (Name/Title): Wesley Samms / Development Coordinator		E-mail Address: wsamms@unitedwaysca.org	Telephone: 214-773-8848	Fax Number: 877-908-8922
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		6,399.34	
2.	Social Media		5,991.97	
3.	Canvassing		8,111.35	
4.	Media		13,224.11	
5.	Collateral Messaging		5,985.13	
6.	Group Events		4,600.81	
7.	Other 1		495.47	
8.	Other 2		13,420.47	
	Total			58,228.65
20 - TOTAL COSTS				
1.	Total Costs			58,228.65
	Total			58,228.65
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): Nalleli Sandoval / Financial Stability Director		Signature:		Date: 03/25/2019
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: 2/1/19 - 2/28/19	Adjustment: 0
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916-368-3013
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web	179.69		
2.	Social Media	179.69		
3.	Canvassing	8,344.95		
4.	Media	449.19		
5.	Collateral Messaging	449.19		
6.	Group Events	4,563.76		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	14,166.47		
20 - TOTAL COSTS				
1.	Total Costs	14,166.47		
	Total	14,166.47		
<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: 03/26/2019	
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: 2/1/19 - 2/28/19	Adjustment: 0
Prepared by (Name/Title): Suliana Juarez / IT Coordinator		E-mail Address: Sjuarez@uwfm.org	Telephone: 559-243-3665	Fax Number: 5592888179
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		190.00	
2.	Social Media		95.00	
3.	Canvassing		13,184.70	
4.	Media		504.34	
5.	Collateral Messaging		1,096.16	
6.	Group Events		180.84	
7.	Other 1		2,505.26	
8.	Other 2		.00	
	Total			17,756.30
20 - TOTAL COSTS				
1.	Total Costs			17,756.30
	Total			17,756.30
<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: 03/20/2019
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: 3/1/19 - 3/31/19	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	83.34		
2.	Social Media	458.37		
3.	Canvassing	138,915.59		
4.	Media	1,282.41		
5.	Collateral Messaging	5,919.05		
6.	Group Events	4,538.67		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	151,197.43		
20 - TOTAL COSTS				
1.	Total Costs	151,197.43		
	Total	151,197.43		
<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 / CFO		Signature:		Date: 04/11/2019
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: 3/1/19 - 3/31/19	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	316.74		
2.	Social Media	1,191.78		
3.	Canvassing	517.46		
4.	Media	5,868.24		
5.	Collateral Messaging	2,420.06		
6.	Group Events	983.66		
7.	Other 1	2,581.92		
8.	Other 2	3,076.73		
	Total	16,956.59		
20 - TOTAL COSTS				
1.	Total Costs	16,956.59		
	Total	16,956.59		
<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: 04/19/2019
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: 3/1/19 - 3/31/19	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	1,262.25		
2.	Social Media	2,229.58		
3.	Canvassing	4,437.25		
4.	Media	8,309.81		
5.	Collateral Messaging	2,168.43		
6.	Group Events	1,292.81		
7.	Other 1	1,602.73		
8.	Other 2	.00		
	Total	21,302.86		
20 - TOTAL COSTS				
1.	Total Costs	21,302.86		
	Total	21,302.86		
<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 / Chief Financial Officer		Signature:		Date: 04/16/2019
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: 3/1/19 - 3/31/19	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	1,510.93		
2.	Social Media	1,510.93		
3.	Canvassing	4,302.34		
4.	Media	4,314.19		
5.	Collateral Messaging	3,188.21		
6.	Group Events	1,766.36		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	16,592.96		
20 - TOTAL COSTS				
1.	Total Costs	16,592.96		
	Total	16,592.96		
<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: 04/18/2019	
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	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	23,370

Narrative of Expenditures in EARS and Outreach Activities

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

UWCA Staff Time & Benefits = \$1,253.91, Indirect = \$566.26 (Total = **\$1,820.17**) INLAND EMPIRE: NA, INLAND VALLEY: Web hosting, analytics, and staff time: **\$250**, KERN: NA, MERCED: N/A. MONTEREY: NA, NORTHERN CALIFORNIA: Web Consultant: \$763.50, Staff Time: \$660.26 TOTAL = **\$1,423.86**, NORTHERN SANTA BARBARA: NA. SANTA BARBARA: Staff Time: **\$150**. SAN LUIS OBISPO: NA, VENTURA: Consultant Staff Time: **\$100**. WINE COUNTRY: NA, NORTH COAST OPPORTUNITIES: NA. Subtotal: **\$3,744.03**

2) Provide a narrative of education and outreach activities conducted during the month under web: UWCA: Updated Myfreetaxes.org website. UWCA worked with vendor to update website look and content, and integrate new chatbot information into the website. Had 13,857 EITC web hits. INLAND EMPIRE: NA, INLAND VALLEY: Updated EITC page with additional VITA sites and information for tax payers as to where they can find more information on EITC, CalEITC, and VITA. Linked social media posts that were mostly about VITA and EITC to various places on webpage. Staff time spent to develop content and maintain EITC page. There were 2,537 website hits. KERN: Website updates and pulling insights for reporting purposes. There were 307 website hits. MERCED: N/A, MONTEREY: Updated CalEITC webpage. There were 1,523 website hits. NORTHERN CALIFORNIA: We created a webpage on our www.norcalunitedway.org site along with links to various other sites and resources. Our web contractor consulted with our VITA and 211 coordinator on strategy and execution. CalEITC eligibility flow chart updated to reflect 2019 changes. NORTHERN SANTA BARBARA: NA. SANTA BARBARA: Staff revised EITC and VITA related webpages. Staff also responded to website inquiries for EITC and VITA services. Staff also wrote an e-newsletter story to help educate potential filers. There were 1,094 website hits. SAN LUIS OBISPO: NA. VENTURA: Consultant monitored web analytics and made recommendations for enhancements to drive more traffic, e.g. improving page position in relevant searches. Website content includes eligibility for VITA program, with option to call 211 to schedule an appointment or file online using MyFreeTaxes; list of what documents needed; CalEITC chart; and downloadable copy of the VITA flyer. 159 unique hits. The Free Tax Prep page was the most popular page on the website next to the homepage. We will use the page view analytics to analyze effectiveness of our social media in driving people to the page.

The top Google searches that resulted in the page showing up in search results: tax preparation, free tax preparation and VITA United Way. WINE COUNTRY: We have a home page news story on our website linking visitors to more information about free tax prep including a link on the page to CalEITC information. We had 2,085 EITC webhits. NORTH COAST OPPORTUNITIES: Designed and placed web messaging on website. The NCO website now displays the CalEITC logo, along with the EKS logo on the opening website banner. The CalEITC is also on the VITA appointment request page. 1,423 Home page views <https://www.ncoinc.org/> 148 page views for <https://www.ncoinc.org/about-us/news/free-tax-preparation/> 64 page views for Lake County VITA <https://www.ncoinc.org/programs/volunteer-network/lake-county-volunteer-opportunities/vita/> 51 page views for Mendo <https://www.ncoinc.org/programs/volunteer-network/mendocino-county-volunteer-opportunities/vita/>.

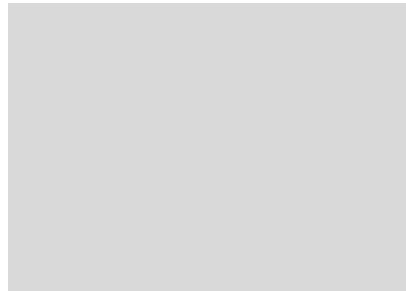
3) Any other additional information pertinent to work conducted during the month in relation to web presence, including indicating any leveraging of other resources: N/A

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

Social Media

Number of Facebook Posts	107	Number of Tweets	107
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	

It's #VITAawarenessday!



Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
<p>asked audience to look at various hashtags to get more information. Most liked Facebook post: "Vroom Vroom! 🚗🚘🚙 Need cash for gas? Or food? Or rent? Wanna file your taxes for free? If you made less than \$66k, then you qualify! Find more information, as well as locations for walk-in nonprofit tax preparation centers! www.MyFreeTaxes.org #CalEITC #ItsYourMoneyGetIt". Most liked Twitter tweet: "Vroom Vroom! 🚗🚘🚙 Need cash for gas? Or food? Or rent? Wanna file your taxes for free? If you made less than \$66k, then you qualify! Find more information, as well as locations for walk-in nonprofit tax preparation centers! MyFreeTaxes.org #CalEITC #ItsYourMoneyGetIt ". KERN: Since March is known to be a bit of a slow month we were able to attend outreach events to remind the community to come do their taxes through VITA if they had not done so yet. We also attended Collaborative meetings and visited schools to promote CalEITC AND VITA as well. Other social media posts were ones that were in UWCA social media calendar. They made 16 facebook posts, 19 Twitter tweets, and six Instagram posts The most liked Facebook Post: "A special thank you to our dedicated volunteers and partner, Assemblyman Rudy Salas, for helping promote and assist out VITA site today at the Boys and Girls Club! 😊 #VITA #KVP #happytaxclients". The most liked Twitter Tweet: "A special thank you to @rudysalasjr for coordinating and helping promote our VITA program and the Boys and Girls Club tax site!". The most liked Instagram post was: "Promoting VITA at kbak. If you still need to get your taxes done, FOR FREE, give us a call to make an appointment or log onto our website for multiple locations and times. 661-834-1820 uwkern.org #vita #unitedway #kbak #calitc #kerncounty". MERCED: Posted 5 Facebook posts, 27 Twitter tweets, and 8 Instagram posts. The most liked Facebook post was: "👉 66% of Californians w/out employer offered retirement plans work for small businesses. 🗣️ That's why #CalSavers has no employer fees! 🙌 If you own a #smallbiz w/ <100 employees or work for 1. 🧑🏿 If you grind 24/7 + don't have 🕒 or 💰 to waste visit www.calsavers.com 📍 AARP California SEIU California SEIU 721 UnidosUS Youth Policy Institute California Hispanic Chambers of CommerceCalNonprofits</p> <p>Insurance Services Bay Area Chamber of Commerce Cal Budget Insurance & Tax Services United Ways of California". The most liked tweet was: "Thank you @UnitedWayMerced for doing great work to expand #FreeTaxPrep in #MercedCounty and connect residents to #CalEITC @AdamGrayCA twitter.com/UnitedWayMerced Nalleli Sandoval@nysandoval86 Mar 8" The most liked Instagram post: "👉 66% of Californians w/out employer offered retirement plans work for small businesses. 🗣️ That's why #CalSavers has no employer fees! 🙌 If you own a #smallbiz w/ <100 employees or work for 1. 🧑🏿 If you grind 24/7 + don't have 🕒 or 💰 to waste visit www.calsavers.com 📍". MONTEREY: Crafted, scheduled, and posted 7 Facebook, 8 Twitter, and 4 Instagram social media posts that spread awareness of the CalEITC credit, who qualifies, and how to find more information. Their most liked facebook post was: "One month left to file your #taxes. Make #VITA your next stop. Trained volunteers can file your taxes free. They can even help you claim the credits you deserve. The average refund for folks who qualify is \$3,000 through EITC & #CalEITC! Don't let free tax prep pass you by! For more info and locations across the county dial 211 or visit www.unitedwaymcca.org/freetaxprep". Their most liked Twitter tweet</p>	

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
<p>was: "2 weeks left to file your taxes. Last year #VITA helped return \$4M to Monterey County. Visit a free VITA tax site today or file online with @MyFreeTaxes. Get your full refund and your #CalEITC credit. Visit https://bit.ly/2Htsksi, call 211, or text mcfreetaxprep to 898-211". Their most liked Instagram post was: "Thousands + thousands leave up to \$6,000 on the table each year — \$2 Billion in total! 😱👉 Don't be one of them! Even if you don't have to file taxes because of low income, you might qualify for #EITC + #CalEITC! 💰 Visit www.MyFreeTaxes.org today! ➡️ It's Your💰Get It!". NORTHERN CALIFORNIA: Scheduling and process of social media needs for all programs including VITA and CalEITC conducted by Social Media Director. Created 6 Facebook Posts, 4 Twitter Tweets, and 4 Instagram Posts. The most liked Facebook post was: "Did you know that you could get your taxes done for free? This Tuesday you can get your taxes done for free and see if you qualify for #CalEITC! Call 2-1-1 for an appointment. #California #taxes". The most liked Twutter Tweet was: "Come get your taxes done for free and stay for the food trucks!". The most liked Instagram Post was: "Did you know you can still get your taxes done for free? Our big event might be over but VITA is still able to file your taxes for free! To schedule an appointment call us at 530-241-7521". NORTHERN SANTA BARBARA: Heather Kunkle, Digital Media Specialist managed full</p> <p>NSBCUW digital media presence. Posted 10 times on Facebook 5 times on Twitter, and once on Instagram. The Most liked Facebook Post was: "Thousands + thousands leave up to \$6,000 on aathe table each year — \$2 Billion in total! 😱👉 Don't be one of them! Even if you don't have to file taxes because of low income, you might qualify for #EITC + #CalEITC! Visit www.MyFreeTaxes.org today! ➡️ It's Your💰Get It!". The Most Liked Twitter Tweet was: "Thank you to everyone helping to provide free tax prep services via (link: http://www.MyFreeTaxes.org) MyFreeTaxes.org! 😊 The average refund for folks who qualify is \$3,000 through EITC & #CalEITC alone! 💰💰 Check out these stories ❤️ & subscribe to our YouTube channel to see... (link: http://www.myfreetaxes.org/) myfreetaxes.org". The most liked Instagram post was: "😞 this 🗣️ or that 🗣️? Is English ur 2nd language? In school? Self-employed? Elderly? Disabled? Living paycheck-to-paycheck? For 50 years #VITAWorks has helped folks Earn it! Keep it! Save it! 😊💰</p> <p>File for free 🗣️ + get a bigger refund w/ #CalEITC 💰 ➡️ www.MyFreeTaxes.org each day.g." There were a total of 408 Facebook followers being exposed to social posts daily. SANTA BARBARA: Staff drafted and posted social media 8 Facebook 4 Twitter, and 4 Instagram. Staff also interacted with social media users to encourage further engagement. Most liked Facebook Post: "Happy #StPatricksDay! 🌈 Did you file your taxes yet? 😊 Self employed? W2? 1099? Child support? No problem! 🌍 We help folks file state + federal taxes for free & put \$\$\$ back in their pockets w/ #CalEITC ➡️ www.MyFreeTaxes.org 🗣️ EarnIt! KeepIt! SaveIt! #VITAWorks. To get your taxes done in person visit unitedwaysb.org/vita for sites in Santa Barbara County!" Most liked Twitter Tweet: "Thank you</p> <p>to everyone helping to provide free tax prep services via http://www.MvFreeTaxes.org! 😊 The average refund for folks who</p>	

Target Area	15-Statewide
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<p>to everyone helping to provide free tax prep services via http://www.MyFreeTaxes.org. The average refund for folks who qualify is \$3,000 through EITC & #CalEITC alone! 🙌🙌 Check out these stories ❤️ #EarnItKeepItSaveIt". Most Liked Instagram post: "Vroom Vroom! 🚗🚗🚗 Need cash for gas? Or food? Or rent? Wanna file your taxes for free? If you made less than \$66k, then you qualify! Find more information, as well as locations for walk-in nonprofit tax preparation centers! www.unitedwaysb.org/VITA #CalEITC #ItsYourMoneyGetIt #VITA #UnitedWaySB #LiveUnited". SAN LUIS OBISPO: They posted four times to Instagram, Facebook, and Twitter. The most liked Facebook post was: " The average #EITC + #CalEITC credit is \$3,000. That's a good sized slice. Yesterday was #VITAAwarenessDay. Today is #PiDay. Tomorrow is get your taxes done for free day!</p> <p>Visit www.MyFreeTaxes.org - OR - Text CalEITC to 51555 - OR - Call 211 + ask for a VITA site near you!". The Most Liked Twitter Tweet and Instagram Post was: "Happy #StPatricksDay! 🌟🌈 Did you file your taxes yet? 😊 Self employed? W2? 1099? Child support? No problem! 🍀 We help folks file state + federal taxes for free & put \$\$\$ back in their pockets w/ #CalEITC http://www.MyFreeTaxes.org 🙌 EarnIt! KeepIt! SaveIt! #VITAworks." VENTURA: Facebook: 9 posts, 6 shares, 3 likes, 876 people reached, 26 engagements. Most liked Facebook post: "Have you made your #VITA appointment yet?!? What are you waiting for? Make sure you're ready! Visit https://bit.ly/2Gnb9Zm to find out more and #Dial211 for an appointment.". Most liked Twitter post: "Get inspired by some of these stories from @AmericaSaves! What will you do with our return? https://bit.ly/2mm5b0S #VITA #CalEITC". Twitter: 16 tweets, 20 likes, 8 retweets, 7097 impressions, 95 engagements. Instagram: 5 posts, 13 likes, most liked post: "Self-employed? You can still qualify for #CalEITC! Find out more at https://bit.ly/2Gnb9Zm and #Dial211 to schedule your #VITA appointment". WINE COUNTRY: There were 8 Facebook Posts, the most liked one was: "Vroom Vroom! 🚗🚗🚗 Need cash for gas? Or food? Or rent? Wanna file your taxes for free? If you made less than \$60K, then you qualify! Find more information, as well as locations for tax preparation centers! http://www.MyFreeTaxes.org #CalEITC #ItsYourMoneyGetIt." There was one Twitter tweet, but it received no likes. They also had a sponsored post which mentioned CalEITC. NORTH COAST OPPORTUNITIES: Using CalEITC resources, social media messaging was posted on NCO Volunteer Network facebook and Instagram pages, and North Coast Opportunities facebook page. Exact Messaging of Most-Liked Facebook Post: "Take a moment to make sure you're not among the 1 in 5 workers that the IRS says is missing out on the Earned Income Tax Credit. Find out if you could get a cash back refund on tax day: #caleitc4me.org/earn-it/#CalEITC #EITC #TaxSeason #TaxRefund". Exact Messaging of Most-Favorited Twitter Post: "A5: Californians living paycheck-to-paycheck w/ ITINs should be rewarded for work w/ access to CalEITC Let's include 1.1 million men, women + children in the financial, health + educational benefits of this proven, bipartisanly popular anti-poverty program #CalEITCtalk #CA4All". Number of Other Posts (Instagram, etc.) 9. Exact Messaging of Most-Liked "Other" Post: "It could be you! Find out if you're eligible: #caleitc4me.org/earn-it/#CalEITC #TaxSeason #TaxRefund".</p>	

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

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Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	2,004
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	132,363
Phone Calls	271
Office Visits	750

Narrative of Expenditures in EARS and Outreach Activities

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

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

UWCA Staff Time & Benefits = \$3,122.65, Text Messaging Tools = \$42,719.01, Indirect = \$566.26 (Total = **\$46,407.92**); INLAND EMPIRE: Staff Time: \$24, INLAND VALLEY: NA, KERN: **\$5,000**. MERCED: Staff Time: \$595, Table cloth: \$178.61 (TOTAL = **\$773.61**) MONTEREY: NA. NORTHERN CALIFORNIA: Staff Time: **\$976.2**. NORTHERN SANTA BARBARA: Staff Time: \$330, Supplies: \$150 (TOTAL = **\$480**). SANTA BARBARA: Staff Time: **\$1,700**. SAN LUIS OBISPO: NA

Subtotal: **\$55,361.79**

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

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

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

We sent out 132,363 text messages to clients on behalf of our partners across the state. The text messages contained a screening for preferred language in English and Spanish as well as a quick qualifying survey to screen for EITC and free tax preparation. It then provided a list of nearby free tax sites by zipcode to have taxes prepared in-person, dropped off, or on-line on their own. It sent reminders if requested after 2 weeks.

5) Provide broad overview of Phone Calls conducted: See Below.

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:

INLAND EMPIRE: 16 callers experiencing financial issues were informed about CalEITC and given a referral to the closest VITA office to assist them. INLAND VALLEY: NA. KERN: Reached 1,756 clients through targeted canvassing in the following zip codes: 93215, 93203, 93241, 93250, 93263, 93268, 93301, 93305, 93306, 93307, 93309, 93311, and 93325. MERCED: Created table cloth for outreach events with United Way and CalEITC logos. Went to several community events in targeted zip codes: 95333, 95340, and 95341. MONTEREY: 148 people were reached this time around out of 233 community members of Salinas. Paid out

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

contract to BHC \$5,000.00 previously for Canvassing activities throughout the season Nov. 2018 - June, 2019. We will be reporting activities on a monthly basis. Target zip code 93905, & 93906 Veronica our resident leader for this month decided to hand out flyers as she went about her regular days routine. She handed out 20 flyers at the Wednesdays' mass out of 50 people that were there for the ceremony. In her apartments she handed out 25 to her neighbors out of 30 units. Veronica handed out 9 in her class at the adult school out of 15 students and, on her way back home in the bus she handed out 28 out of 40 people riding the bus. On a Thursday after picking up the kids she watches she decided to take them to the park where she handed out 28 out of 30! Veronica is a resident leader for the labor council too so she decided to take 10 flyers there and handed out 8 to community members. She also attended a community meeting where she was able to share the information with 30 residents out of 50. NORTHERN CALIFORNIA: Reviewed what's needed for each VITA appointment and informed the prospective client of the potential tax credits to include CalEITC, conducted 95 phone calls in zip codes 96001, 96002, and 96003. NORTHERN SANTA BARBARA: Attended events in 93444, 93454, and 93458 zip codes at the Nipomo Library on 3/20/19 for a free tax prep workshop with presence from Congressman, Salud Carbajal. Presented on our VITA program and CalEITC. Attended the Healthy Food Pantry monthly gathering at the Veterans Center on 3/21/19. Over 100 individuals assisted. They were there to get free healthy food plus information about community services and awareness about VITA/CalEITC. At our end of the season VITA celebration, we had the IRS rep present, the congressman Salud Carbajal's rep present, volunteer and clients. We encouraged them to continue to support VITA/MFT/CalEITC. SANTA BARBARA: VITA Site Coordinators began work at their VITA sites. Site Coordinators were tasked with assisting with intake of clients, asking questions to help determine CalEITC eligibility, and distributing informational CalEITC fliers to appropriate individuals. UWSBC staff continued to field phone calls from individuals wanting to file their taxes. Staff reminded callers to learn more information about EITC through our website. Community

Impact Associate continued phoning community partners to coordinate EITC efforts and delivered three community presentations/distributions of materials for their clients at low-income apartment complexes. 160 Calls and 750 officevisits were also made to key community partners to ensure that they also would help drive clients to this year's VITA sites. Site schedules were left in their lobbies 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: NA. VENTURA: VITA flyer with CalEITC messaging - Cabrillo Economic Development Corporation - shared electronically with property managers to share with residents of 1194 units at 26 properties located in Ventura (93003,93004), Oxnard (93030, 93033), Ojai (93023), Santa Paula (93060), Fillmore (93015), Simi Valley (93063, 93065. Outreach Fillmore (93015) tax day - 265 flyers were sent to clients with earned income of the County of Ventura Human Services Agency residing in Fillmore. Flyer was also shared electronically with One Step A La Vez (93015) and Circle of Care (93015) a Fillmore community collaborative. NORTH COAST VOLUNTEER: Every EKS appointment maker informed 250 taxpayer/callers that they may be eligible for CalEITC. One hundred brochures and sixty copies of CalEITC outreach materials printed from CalEITC 4 You resources page distributed at three tax prep sites in Lake and Mendocino counties: NCO located at 413 N. State Street, Ukiah, NCO located at 850 Lakeport Blvd, Lakeport, and Lake County Employment Services located at 9055 Hwy 53, Lower Lake.

Target Area	15-Statewide			
Reporting Period	March 1, 2019 - March 31, 2019			
Media				
Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	8	40,000		
Paid Radio Ads	117		74	68,000
Public Services Announcements (Radio)	1,305	1,376,450	50	65,000
Paid Television Ads	17	23,000	34	39,000
Public Services Announcements (T.V.)	623	694,150	33	64,500
Billboards	6	1,950,000		
Transit Advertisements	33	1,844,702	15	150,000
Internet/Website Ads	3	65,009	2	10
Social Media Promoted/Boosted Ads	3	71,309		

Narrative of Expenditures in EARS and Outreach Activities

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

UWCA Staff Time & Benefits = \$1560.16, Indirect = \$556.26 Transit Ads = \$12,250.40, (Total = **\$14,376.82**); INLAND EMPIRE: NA, INLAND VALLEY: NA, KERN: Staff time: **\$137.34**. MERCED: Staff Time: **\$316**. MONTEREY: Social Media Boosted Ad **\$25**. NORTHERN CALIFORNIA: NA. SANTA BARBARA: NA. NORTHERN SANTA BARBARA: Paid Radio Ads: \$799, Telemundo TV PSA: \$500 (TOTAL = **\$1,299**). SAN LUIS OBISPO: Print Ads: **\$3681.96** VENTURA: NA WINE COUNTRY: Sponsored Social Media Boosted Ad: \$690.77, Transit/Bus Ads - \$3,150, Radio Ads - \$2,216.66, TOTAL: **\$6,057.43**.

Subtotal: **\$25890.55** (see Stanislaus/San Joaquin for additional expenditures)

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: See Below

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:

UWCA: Placed 18 transit ads in Chico, Redding, Yuba/Sutter, and Manteca with 38,702 impressions. Also, had 5 outdoor digital billboards that had 8,144,720 additional impressions.

INLAND EMPIRE: N/A. INLAND VALLEY: NA, KERN: On March 6th we interviewed with Telemundo Valle Central. On March 29th we interviewed with KBAK EyeWitness News

<https://bakersfieldnow.com/news/eyewitness-mornings/united-way-volunteers-offering-free-tax-return-preparation>. CalEITC Ad Recording with partners CapK on March 26th.

MERCED: They had a 60 second and 15 second spots for a paid radio ad and public service radio ad on KHTN and KYOS, with 263,250 impressions and a billboard with 1,950,000 impressions. The materials are in both English and Spanish. MONTEREY: Had 34 paid Spanish ads run, 50 English and Spanish radio PSAs, 17 English and 34 Spanish paid television ads. 16 English and 32 Spanish TV PSAs, as well as 15 transit ads in English and Spanish. The TV ads ran on the following stations: KSMS, KDJT, KCBA and KSBW 8 NBC, KSBW Central Coast ABC AND Estrella TV. The Radio ads run on the following stations: KLOK-FM, KSES-FM, KWAV-FM. The TV ads ran on the following stations: KSMS, KDJT, KCBA and KSBW 8 NBC, KSBW Central Coast ABC AND Estrella TV. The Radio ads run on the following stations: KLOK-FM, KSES-FM, KWAV

-FM. Additionally Socorro did a live on the air interview with Radio Bilingue KHDC with coverage throughout California.

<https://www.facebook.com/uwmonterey/photos/a.143973958524/10156510436173525/?type=3&theater>. We have not received invoice as of yet. Also ran one English and 2 Spanish internet/website ads. NORTHERN CALIFORNIA: NA. NORTHERN SANTA BARBARA: Paid Radio Ad had a Net reach: 30,000, Frequency: 2.2, Spots: 83, Stations: KPAT-FM, KRQK-FM. Also ran a TV PSA that reached 150. Additionally, Telemundo assisted us with outreach to over 500,000 viewers on KTAS33. SANTA

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

BARBARA: NA. SAN LUIS OBISPO: Printed Ads: New Times on 3/7/2019 - page 9
https://issuu.com/ntmg/docs/issuu_03.07.19/8?fbclid=IwAR1iQc5VhZ5dmDjgezZ_hlYVshSoiz4fEVv3A6E9HA1arqOHGUTxckGUpR0 The Tribune on 3/31/2019 - page 4B <http://digital.olivesoftware.com/Olive/ODN/SanLuisObispo/default.aspx>.
 TV Ad and Radio PSA previously emailed. [TV Ad: https://youtu.be/DLq-DoatCDI](https://youtu.be/DLq-DoatCDI). VENTURA: NA. WINE COUNTRY: We have an English sponsored post with information about EKS, and it mentions CalEITC. This post reached 18,924 and made 69,812 impressions. We estimate the impressions at 180,386 per radio spot. This is based on a 2016 Infinite Dial report that fifty-seven percent of U.S. adults ages 12 and over had listened to online radio in the past month, according to the 2016 Infinite Dial report from Edison Research and Triton Digital. This means that we had 14,070,108 English impressions in March. We can estimate 1,656,000 impressions for transit based on a national Roadmark study that estimates 1380 impressions per hour during peak hours in rural areas. If we assume 4 peak hours per day, the total number of impressions over 30 days is 165,600 per bus.

Collateral Messaging	
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Category	Metrics
Number of Flyers/Brochures Distributed	14,107
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

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

UWCA Staff Time & Benefits = \$1,253.91, Indirect = \$566.26 Graphic Designer = \$250, Print & Digital Communications - Mailchimp = \$107.85, (Total = **\$2,178.02**) INLAND EMPIRE: Staff Time: **\$200**, INLAND VALLEY: Staff Travel: \$34.80, Printing \$750, TOTAL: **\$784.80**. KERN: NA. MERCED: Staff Time: **\$595**. MONTEREY: NA. NORTHERN CALIFORNIA: Staff Time: **\$707**. NORTHERN SANTA BARBARA: NA. SANTA BARBARA: Staff Time: **\$300**. SAN LUIS OBISPO: Supplies: \$312, Staff Time: \$837.68 (TOTAL = **\$1149.68**). VENTURA: Staff Time: **\$135**. WINE COUNTRY: Staff Time: **\$333.60**. NORTH COAST OPPORTUNITIES: NA.

Subtotal: **\$6,383.10** (see Stanislaus/San Joaquin for additional expenditures)

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

United Ways of California has been working to develop, print and distribute CalEITC postcards.

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

See Below.

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

INLAND EMPIRE: 200 CalEITC postcards were distributed that were provided by UWCA. Provided 40 English and 40 Spanish printed postcards to local agency that has a number of low income families that may benefit from the program. While going on a couple of events for the month of March, clients were given information on Cal EITC. At one specific event which was a "Tacos & Taxes" event, a lot of individuals were only going to get the free tacos but did not understand what the event was for and many clients were given informational flyers on CalEITC. INLAND VALLEY: 1,500 Flyers were printed and 2,500 flyers were distributed to individuals at various events throughout the service area. Chamber events, United Way campaign events, and health fairs were included in Mead Valley/Perris, at the Moreno Valley Senior center, and the Jurupa

Valley community center. KERN: Distributed 2,850 fliers to Advanced America, Canyon Hills Church, Vision y Compromiso, East High School, Infant Toddler Seminar, KCNC Collaborative Meeting, Greenfield Collaborative Meeting, Highland High School, and South High School. MERCED: They distributed 200 flyers. MONTEREY: NA. NORTHERN CALIFORNIA: We distributed 82 postcards with our contact info by canvassing retailers in our community. 100 flyers went out to members of the

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

North Valley Employer Advisory Council. NORTHERN SANTA BARBARA: NA. SANTA BARBARA: 1,625 flyers and posters were distributed to all VITA sites, as well as dozens of community partners serving target populations to drive attendance to VITA and to raise awareness of EITC. Fliers and posters were distributed to all VITA sites, as well as dozens of community partners serving target populations to drive attendance to VITA and to raise awareness of EITC. SAN LUIS OBISPO: Distributed 5,000 flyers at Community/Agency Events including Health & Wellness Fairs, Senior Resource Fairs, including 2-1-1 Tabling and booth appearances countywide. VENTURA: 100 flyers each were distributed at Moorpark College and California Lutheran University Oxnard Satalite Campus promoting MyFreeTaxes, also included messageing for CalEITC eligibility. The CalEITC postcards (both English and Spanish) were distributed to the following agencies: Boys and Girls Clubs of Ventura and Camarillo 93003, 93004, 93012, 93010 - 100 to each club, Lutheran Social Services - Thousand Oaks, 91360, 91362 - 100, First 5 Ventura County - 200 to be distributed to Family Resource Centers in Oxnard (93030, 93033) Port Hueneme (93041), Ventura (93001), Santa Paula (93060), Camarillo (93010, 93012). WINE COUNTRY: 300+ flyers distributed. Various staff have shared information with local businesses by email including flyers which could be printed and banner ads to use on their intranet. We are encouraging them to share broadly with employees or anyone who may qualify for the program. NORTH COAST OPPORTUNITIES: NA.

Group Events

Total Number of Events Held During the Reporting Period			58	
Location	Zip Code	Date	Attendance	Press at Event?
San Bernardino, CA	92401	03/09/19	175	No
Educational Forum	92563	03/05/19	65	No
Educational Forum	92595	03/07/19	250	No
Educational Forum	92563	03/08/19	50	No
Educational Forum	92223	03/08/19	150	No
Educational Forum	92563	03/12/19	45	No
Educational Forum	92595	03/13/19	225	No
Educational Forum	92507	03/19/19	48	No
Educational Forum	92222	03/19/19	10	No
Educational Forum	92595	03/21/19	200	No
Educational Forum	92220	03/21/19	25	No
Educational Forum	92555	03/27/19	125	No
Educational Forum	92563	03/27/19	100	No
School	92223	03/12/19	10	No
Resource Fair	92501	03/19/19	2000	No
Resource Fair	92501	03/18/19	250	No

Target Area	15-Statewide			
Reporting Period	March 1, 2019 - March 31, 2019			
Educational Forum	92563	03/27/19	50	No
Educational Forum	92563	03/01/19	25	No
Educational Forum	92563	03/07/19	250	No
Educational Forum	92595	03/12/19	200	No
Educational Forum	92595	03/13/19	100	No
Educational Forum	92595	03/14/19	90	No
Educational Forum	92570	03/14/19	115	No
Educational Forum	92563	03/27/19	25	No
Educational Forum	92220	03/04/19	20	No
Educational Forum	92220	03/11/19	20	No
Educational Forum	92220	03/18/19	20	No
Educational Forum	92220	03/25/19	20	No
Educational Forum	92570	03/05/19	25	No
Educational Forum	92507	03/12/19	40	No
Educational Forum	92555	03/13/19	100	No
Educational Forum	92555	03/19/19	50	No
Educational Forum	92563	03/05/19	65	No
Educational Forum	92220	03/04/19	20	No
Educational Forum	92220	03/11/19	20	No
Educational Forum	92220	03/18/19	20	No
Educational Forum	92220	03/25/19	20	Yes
Resource Fair	95340	03/02/19	500	No
Community Gathering	95340	03/12/19	60	No
School	95341	03/23/19	100	No
Salinas	93905	3/28/2019	233	no
Resource Fair	96002	03/21/19	50	no
Free Tax Prep	96003	03/26/19	75	yes
Resource Fair	96001	03/27/19	50	no
Library	93420	03/03/19	7	No
Library	93420	03/10/19	5	No
Library	93420	03/17/19	5	No
Library	94322	03/03/19	13	No
Library	94322	03/10/19	10	no
Library	94322	03/17/19	9	No
Library	93403	03/03/19	14	No

Target Area	15-Statewide			
Reporting Period	March 1, 2019 - March 31, 2019			
Library	93403	03/10/19	12	No
Library	93403	03/17/19	24	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 & Benefits = \$1,253.88, Indirect = \$566.26, Travel = \$989.04 (Total = \$2,809.18); INLAND EMPIRE: NA, INLAND VALLEY: Staff Time: \$3,038. KERN: NA. MERCED: Staff Time: \$725. MONTEREY: NA. NORTHERN CALIFORNIA: Staff Time: \$1060.26. NORTHERN SANTA BARBARA: NA, SANTA BARBARA: NA, SAN LUIS OBISPO: Staff Time: \$3,065.26. NORTH COAST OPPORTUNITIES: Staff Time: \$1,298.

Subtotal: \$10,697.70

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

United Ways of California has met with different state partners to discuss new expansion eligibility including Horizontal Integration groups.

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

INLAND EMPIRE: NA, INLAND VALLEY: NA, KERN: KBAK, KGET, and Telemundo were present at the educational forum held on 2/2/2019. MERCED: NA, MONTEREY: NA. NORTHERN CALIFORNIA: Action News interviewed VITA Coordinator on the E-Bus. SAN LUIS OBISPO: Tax Help Workshop at Nipomo Library on 3/20/2019 - press in attendance was KSBY 6 TV. See Facebook posts on right.

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

INLAND EMPIRE: This was a "Tacos and Taxes" event in which a few non-profits attended and 175 people from the surrounding area went for the free food. As many individuals approached our 211 table, we were able to educate people to understand the purpose of the event and provide the guidelines for CalEITC. INLAND VALLEY: 4 staff members presented at 32 educational forums, 2 resource fairs and a school totaling 4,848 community members in attendance. KERN: NA, MERCED: They are trying to purchase a table cloth with "It's Your Money Get IT!" (English and Spanish with Live United in the middle of both). They attended three events with 660 community members present. MONTEREY: Attended one event with 233 total participants.

NORTHERN CALIFORNIA: Went to three events: Tehama County Probation and Parole Outreach

Date: 3/21/2019, # of People contacted: 22, # of VITA materials given: 5 brochures/fliers. VITA Rebuild Day-Ebus Date:

3/26/2019, # of People contacted: 6, # of VITA materials given: 2 brochures/fliers. Eliminating Barriers to Employment GEO

Reentry event Date: 3/27/2019, # of People contacted: 26, # of VITA materials given: 14 brochures/fliers. SAN LUIS OBISPO:

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
<p>21 MyFreeTaxes Tax prep locations held at 3 SLO County Public Libraries in Arroyo Grande, Atascadero and San Luis Obispo over 7 weeks for a total of 21 events plus 1 Tax Help Workshop hosted by Representative Salud Carbajal on 3/20/2019 at Nipomo Library. NORTH COAST OPPORTUNITIES: Group events were held at: NCO Governing Board Meeting, NCO Leadership Meeting, Healthcare Coalition Meeting, Mendocino County Office of Education, Senior Corp Program In-service and Advisory Councils, City of Ukiah Community Meeting, Willits Senior Center, Ukiah Senior Center, Project Sanctuary, Soroptimist of Ukiah. 20 VITA volunteers trained in CalEITC eligibility and resources recipients are eligible to receive. They are able to explain the advantages of filing a tax return and the possibility of receiving Cal EITC . Save your refund-type flyers are provided to CalEITC recipients. Ukiah Site Visit from Congressman Huffman's Field Representative, Sheba Brown, on April 5th. Ms. Brown greeted taxpayers and provided CalEITC handouts.</p>	

Post Details

United Way of San Luis Obispo County
 March 19 at 3:22 PM · 🌐

United Way of San Luis Obispo County CEO, Rick London, will be on a panel with our key VITA and MyFreeTaxes Volunteer, Susan Knowles, at a FREE Tax Season Informational Workshop hosted by Representative Salud Carbajal on Wednesday, March 20th from 6:00pm - 7:30pm at the Nipomo Library Community Room.

EVENT ADVISORY: Carbajal to Host Tax Season Informational Workshop NIPOMO, CA – Wednesday, March 20th, Rep. Salud Carbajal (CA-24) will host a tax season informational workshop w... [See More](#)



Tax Season Workshop

Nipomo Library

March 20
 6:00pm-7:30pm

Internal Revenue Service (IRS) and Volunteer Income Tax Assistance representatives will tell you everything you need to know about:

- Overview of Tax Law Changes
- Volunteer Tax Assistance
- Refunds and What-to-do-if-you-Owe
- Security Awareness for Taxpayers

For more information call Rep. Salud Carbajal at 805-546-8348

Post Details

United Way of San Luis Obispo County
 March 20 at 9:00 PM · 🌐

Thanks to Congressman Salud Carbajal for hosting a Tax Season Workshop at the Nipomo Library tonight. Guests included United Way of San Luis Obispo County CEO Rick London, Sandy Soria and Cary Gray from Northern Santa Barbara County United Way and key VITA Volunteers from both United Way agencies. Community members learned about IRS changes and info as well as local tax assistance services available from our regional United Ways including MyFreeTaxes.com.

#unitedway #VITA #MyFreeTaxes #nsbcuw #unitedwayslo #saludcarbajal #taxseasonworkshop



134 People Reached 22 Engagements [Boost Post](#)

👤 Monica Anderson, Charlie Fruit and 6 others 1 Share

👍 Like 💬 Comment ➦ Share

Other

Category	Actual (#)
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Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
211 Hold Message	5339
DMV Ads	5

Narrative of Expenditures in EARS and Outreach Activities

Expenditures: UWCA: Indirect costs totalling \$566.26 for 211 Hold Message (OTHER 1) (Total = **\$566.26**) INLAND EMPIRE: No expenditures.

Subtotal: **\$566.26**

ACTIVITIES:

INLAND EMPIRE: 6,088 hold messages.

UWCA has been working with Motor Vehicle Network to produce ad copy and get placement at five local Dept Motor Vehicle locations at Turlock, Riverside, Merced, Tracy, and Delano estimated number of visitors were 83,560 with impressions of 596,561. Also worked to research and place movie theatre ads in strategic locations like Bakersfield and Merced which resulted in 297,500 plus 327,500 from digital ads for a total of 625,000 additional impressions.

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

INLAND VALLEYS: So many people have never heard of VITA or EITC. The message is critical, but we find people tuning out when we start to talk about tax preparation. KERN: Due to past actions from ICE and other situations around immigration, many communities began to be more protective of their personal information. Keeping this in mind, our team of promotoras organized activities in strategic locations; mentioned previously, to allow each individual to feel comfortable asking questions and taking information. It is very difficult to get impressions from TV/Radio shows and interviews we have conducted because, although we ask radio and TV staff for ratings info, we just can't seem to get this data from them. I'm not sure what other agencies are doing to get impressions and number of listeners, but it would be great to get some tips on how to make this easier. Online, we can only find national numbers, not local. WINE COUNTRY: Tax law changes with ITIN filers has also prolonged the tax appointment with clients who are used to getting bigger refunds not understanding why they are not this year. This has been hard to communicate sometimes.

Narrative of Success Stories

Success Story #1

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
<p>Success Story #1 Date of Success Story: 3/13/19 Name of Person from Success Story: Saul Moreno Zip-Code Where Person Lives: VITA Site where person got taxes done (if applicable): United Way of Kern County Narrative: This family had been paying for many years for tax services until they heard of VITA. This was their first year going through the program and they were super happy with their refund. They qualified for EITC and were very pleased that we took the time to explain to them briefly how the tax system worked and what credits they had recieved. Liability waiver signed? Yes</p> <p>Success Story #2 Date of Success Story: 3/21/19 Name of Person from Success Story: Oscar Zip-Code Where Person Lives: N/A VITA Site where person got taxes done (if applicable): United Way Narrative: Oscar is a single dad who is hearing impaired. A mobile tax day was set up at the United Way office for the hearing impaired clients of Tri-Counties GLAD (also located in our building). Oscar's return including EITC was over \$5000. Volunteers also amended his 2017 return as at the time it was prepared he did not have his son's social security card. Liability waiver signed? no, verbal consent</p> <p>Success Story #3 Date of Success Story: 3-8-19 Name of Person from Success Story: William Cruz Zip-Code Where Person Lives: 95503 VITA Site where person got taxes done (if applicable): St. Joe's Healthy Kids - Humboldt County</p> <p>Narrative: Mr. Cruz is 20 years old and lives in Eureka but was at UCSF with a very sick baby when he drove up to have his taxes filed with Healthy Kids Humboldt and then back to UCSF the same day. He works as a manager with an AGI of \$12,928 in 2018. His total refund was \$6,382 , of which \$204 of that was CalEITC and another \$3,461 was Federal EITC.</p>	

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
<p>Shortly after he filed, his baby died. Liability waiver signed? No.</p> <p>Success Story #4 Date of Success Story: 3-8-19 Name of Person from Success Story: Joy Stearns Zip-Code Where Person Lives: 95427 VITA Site where person got taxes done (if applicable): North Coast Opportunities - Lake County Narrative: Joy Sterns , 63 years old, works at Lake Family Resource Center and had an AGI of \$7593. She received \$918 in CalEITC claiming Head of Household as she cares for her 17 year old nephew. Her federal EITC was \$2,576 and her total refund was \$4017! Liability waiver signed? No, but left a message to get one. TBD.</p> <p>Success Story #5 Date of Success Story: 3-5-19 Name of Person from Success Story: Ana Zip-Code Where Person Lives: Mendocino VITA Site where person got taxes done (if applicable): North Coast Opportunities - Mendocino Narrative: Ana is 30 years old and filed HOH with two children. She received \$2,233 in CalEITC! Liability waiver signed? No, spanish speaking I believe</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-8017
Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	105,936

Narrative of Expenditures in EARS and Outreach Activities

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

GSO Website Management and Updates: \$15,000
GSO Translation and Website tools, and hosting costs: \$4,214.62
Web total: \$19,214.62

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

CalEITC4Me.Org functioning in 6 Languages (English, Spanish, Mandarin, Korean, Vietnamese, Tagalog, Russian)

English/Spanish Site Updates:

- EITC Calculator Tool functioning in
- Email my results button
- Free Tax Prep. Location tool updated with new VITA and Tax Aid locations
- First partner event information added to CalEITC4Me website
- Updates to "In the News" page, including new articles about Cal EITC
- Update to the Caluclator page with system to email your results
- Update to Free Tax Prep Finder with new VITA and Tax Aide locations
- Updates to the partner page with new infomration about collateral
- Updatedd downlaodable materials with new collateral pieces and Toolkits

Other Language Microsite have the calculator page translated with EITC information and available collateral pieces.

Database - Implementing new system to capture sign-up information from website, Digital Ads, Text keywords and automatically update our database.

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

-Creation of new website rotationals on homepage, and new header images on main pages (Earn it, Get it). Includes new image of First Partner Jenifer Siebel Newsom at our Fresno Free Tax Preparation Event in Fresno

-Creation of clone pages to send specific links to different outreach tactics. Our texting program, mail program will use clone pages of the Earn-it and Get-it pages to track the effectiveness of the outreach tactic, and see how much web traffic is generated

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

Social Media

Number of Facebook Posts	58	Number of Tweets	42
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
FRESNO: Join us Saturday March 16 to meet Jennifer Siebel Newsom and learn more about resources to help children and families succeed! https://caleitc4me.org/first-partner/		Our founder @JosephNSanberg is here in Lynwood with @Rendon63rd and @MAOF_Comunidad discussing how expanding the #CalEITC to seniors this year not only benefits them individually, but helps their families as well.	
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:

Social Media Toolkits: \$5,000

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

GSO designed and released 3 Cal EITC Toolkits during the month of March. Please see the link to the

Target Area	15-Statewide	
Reporting Period	March 1, 2019 - March 31, 2019	
<p>CSD designed and released 3 Cal EITC toolkits during the month of March. Please see the link to the toolkits located on CalEITC4Me.org . Each toolkits includes information an introduction with Cal EITC information, sample social media graphics available for download, available collateral pieces, and sample email language. These social media toolkits are resources for partners that can help spread awareness of the program.</p> <p>Younger Californians Toolkit https://caleitc4me.org/wp-content/uploads/2019/04/Tool-Kit-Younger-Californians-1.pdf</p> <p>Older Californians Toolkit https://caleitc4me.org/wp-content/uploads/2019/04/Tool-Kit-Older-Californians.pdf</p> <p>Final Tax Push Toolkit (To be Used in first two weeks of April leading up to April 15) https://caleitc4me.org/wp-content/uploads/2018/04/Tool-Kit-Final-Tax-Day-Push-v2.pdf</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>Please follow links above to see many different social media graphics included in the social media toolkits.</p>		
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	71,068
	Phone Calls	0
	Office Visits	0
Narrative of Expenditures in EARS and Outreach Activities		

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

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

Texting Organizers: \$2,499.98
 Texting Management: \$3,250
 Total: \$5,749.98

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

Texting Per County

Monterey: 10,625
 Merced: 10,537
 Imperial: 6,320
 Napa: 1,962
 Marin 1,518
 Santa Cruz: 3,618
 Placer: 7,439
 Solono: 14,506
 Yolo: 5,418
 Shasta: 9,125

For our statewide texting program, we have sent texts to 71,608 unique contacts during the month of March. The list of counties that were texted consisted of counties that are not specifically funded by state grants.

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

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	6	24,244		
Paid Radio Ads				
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				

Target Area	15-Statewide			
Reporting Period	March 1, 2019 - March 31, 2019			
Transit Advertisements				
Internet/Website Ads	6	697,905	49,613	0
Social Media Promoted/Boosted Ads	12	1,449,807	0	0

Narrative of Expenditures in EARS and Outreach Activities

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

Facebook Boosted Posts: \$950
 Facebook and Instagram Digital Ads: \$22,875
 Video Production: \$1,000
 Earned Media Press: \$5,000
 GSO Staff: \$7,000
 Media Total: \$36,825

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:

Facebook Digital Ads: 697,905 Impressions
 Instagram Digital Ads: 1,400,194 Impressions
 Facebook Boosted Posts: 49,613 Impressions

- 1-3) Promoted New Microsites (Korean, Tagalog, Russian)
- 4) Promoted SaverLife Pledge to save Tax Return and earn extra rewards in partnership with EARN
- 5-6) Fresno Event Boost
- 7) CalMatter Op-Ed
- 8) Phil Ting Op-Ed
- 9) First Partner Newsom Video
- 10) First Partner Newsom Video #2
- 11) AARP Sacramento Boost
- 12) AARP Suisut City Boost

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

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:

First Partner Jennifer Siebel Newsom visits Fresno to highlight CalEITC proposal
<https://www.fresnobee.com/latest-news/article228041119.html>

Asm. Monique Limon: Working students now eligible for a Cal EITC boost
<https://www.vcstar.com/story/opinion/editorials/2019/04/06/working-students-now-eligible-cal-eitc-boost/3357569002/>

Sen. Melissa Hurtado: San Joaquin Valley’s working women get a boost from earned-income tax credit
<https://www.fresnobee.com/opinion/op-ed/article228793349.html>

Josh Fryday: Seniors and others benefit from state income tax credit
<https://www.marinij.com/2019/03/28/marin-voice-seniors-and-others-benefit-from-state-income-tax-credit/>

Laura Capps: California can help 3 million families. Here's how / Marlene Hoffman: For my boys, an extra \$500 will mean their shoes will fit
<https://calmatters.org/articles/commentary/earned-income-tax-credit/>

<http://sfbaytimes.com/lifting-low-wage-earners-poverty-2/>

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

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	50,000
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

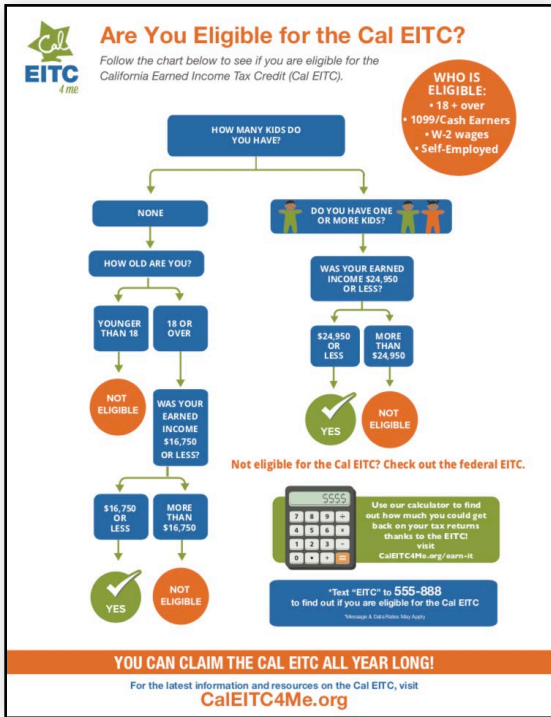
1) List the various activity-expenditures charging for this month and their cost:

Multilingual Collateral Printing: \$5,886.39

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:



BENEFITS CHECKLIST
A resource checklist to help you assess if your client has drawn down all the programs they may be eligible to receive.

- Cal EITC**
The Cal EITC is the new CA Earned Income Tax Credit. Claiming the Cal EITC does not affect other benefits you can receive. For more information visit: CalEITC4Me.org
- CALFRESH**
Monthly food benefits to assist low-income households in purchasing the food they need to maintain adequate nutritional levels. benefits.ca.gov
- CALWORKERS**
Public assistance program that provides cash aid and services to eligible families that have a child(ren) in the home. benefits.ca.gov
- GET CONNECTED!**
To learn more about low-cost internet prices and free/low-cost computers for families. Call 24/7 toll-free: (844) 841-INFO (4636) internetforhow.org
- WIC**
Provides nutrition education, issues checks for healthy supplemental foods, and makes referrals to healthcare and other community services. m.wic.ca.gov
- MEDICAL**
California's Medicaid program, providing free or low-cost health coverage for children and adults with limited income and resources. www.medicare.com/medical
- HEAD START**
Program that provides comprehensive early childhood education, health, nutrition, and parent involvement services to low-income children and their families. eohhs.ca.gov

*TEXT EITC to 555-888 to find out your estimated Cal EITC refund!
Visit CalEITC4Me.org/benefits for more information.





Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

...you can also qualify for a NEW tax credit, Cal EITC!

The California Earned Income Tax Credit (Cal EITC) is a cash-back program that puts money back in the pockets of hard working Californians.

We can help you claim the \$ you have already earned. Claim the Cal EITC to help with rent, bills, education costs, and savings!

Don't miss out on the extra income that can help you pursue your dream. The Cal EITC could help you get hundreds of dollars in tax credits. If you don't owe taxes you may still be eligible. Visit www.caleitc4me.org/earn-it

Free Tax Preparation Available.

TEXT "EITC" TO 555-888
TO FIND OUT HOW MUCH EITC MONEY YOU COULD GET BACK!
*Message & Data Rates May Apply

YOU CAN CLAIM THE CAL EITC ALL YEAR LONG! VISIT CALEITC4ME.ORG TO LEARN MORE.

The California Earned Income Tax Credit (Cal EITC) is a cash-back tax credit that puts money back in your pockets!

California is the first state in the nation where workers over the age of 65 can claim the state EITC.

So far, over 2 million people have claimed more than \$4 billion in state and federal tax credits.



The Cal EITC could help you get nearly \$3000 in tax credits. If you don't owe taxes you may still be eligible.

AARP Foundation Tax-Aide is working with CalEITC4Me to help hundreds of thousands of older adults throughout California keep more of the money they've spent decades earning. Visit www.caleitc4me.org/earn-it

Free Tax Preparation Available.

TEXT "EITC" TO 555-888
TO FIND OUT HOW MUCH EITC MONEY YOU COULD GET BACK!
*Message & Data Rates May Apply

YOU CAN CLAIM THE CAL EITC ALL YEAR LONG! VISIT CALEITC4ME.ORG TO LEARN MORE.

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Free Tax Prep	93727	03/16/19	300	Yes

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activities, expenditures, charging for this month and their costs.

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Event Management and Costs: \$7,218.11 Includes Rentals for Event</p> <p>2) Provide a brief overview of events conducted during the reporting period:</p> <p>Free Tax Preparation Event and Resource Fair in Fresno in Partnership with AARP, United Way Fresno, and First Partner Jennifer Siebel Newsom</p> <p>The resource fair included a food pantry that delivered groceries to more than 200 families in attendance.</p> <p>3) If members of the press attended an event, indicate which press outlets:</p> <p>Univision, ABC, local radio stations</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: N/A</p>	
Other	
Category	Actual (#)
Texting Trainingg	1
Narrative of Expenditures in EARS and Outreach Activities	
<p>GSO Texting Trainings and Partner Message Coordination: \$5,000</p> <p>We hosted 3 texting trainings including 1 recorded via webinar.</p> <p>Other 2: GSO Admin \$2,000</p>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	

Target Area	15-Statewide
Reporting Period	March 1, 2019 - March 31, 2019

A great Success was the Fresno Event with First Partner Jennifer Siebel Newsom. We were also able to record a round table discussion and private video with the First Partner to release and promote on our social media channels and website.

Narrative of Success Stories

Success Story #1

Date of Success Story: March

Name of Person from Success Story: Sonia Zavala

Zip-Code Where Person Lives: Los Angeles, La Puente

VITA Site where person got taxes done (if applicable): MAOF

Narrative: Sonia is a volunteer with CalEITC4Me sending out text messages to workers in her community. She is also a full-time student while working part-time. She recieved the Cal EITC this year

Her story was shared via twitter by the Govenor's Office.

[Office of the Governor of CaliforniaVerified account @CAGovernor](#)

Meet Sonia Zavala - she's a full time student who got her taxes done for free this year and qualified for the [#CalEITC!](#) : [@CalEITC4Me](#)

<https://www.youtube.com/watch?v=cdoYnicCbpo>

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	March 1, 2019 - March 31, 2019

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; all Web activities are conducted through the 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

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: N/A; all Social Media activities are conducted through the Statewide 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	March 1, 2019 - March 31, 2019

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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	50,000
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 Organizers: \$3,000
 Texting Management: \$1,500
 Total Canvassing: \$4,500

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:

Texting 50,000 unique contacts in Rural Counties. Testing 4 different messages and linking them to resources on the website.

Treatment 1: Basic Informational Message + Link

Hi-this is _____ 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 Visit caleitc4me.org/CashBack to learn more about your eligibility and to claim your EITC refund.

Treatment 2: Promote Hotline

Hi-this is _____, 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. Call 211 to get free help with filing your return and to claim your EITC refund.

Target Area	14-Rural
Reporting Period	March 1, 2019 - March 31, 2019

Treatment 3: Offer Text-based Assistance

Hi-this is _____ 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. Text "yes" and I can help you claim your EITC refund.

Treatment 4: Benefit Value

Hi-this is _____, 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. Eligible families got back an average of \$2,000 last year. Text "yes" and I can help you claim your EITC refund.

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

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	6	1,081,865	0	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	14-Rural
Reporting Period	March 1, 2019 - March 31, 2019

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

Digital Ads: \$15,250.00
 GSO Staff and Consulting: \$3,600
 Media Total: \$18,850.00

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:

Facebook Ads directly targeted at newly eligible population and general Cal EITC eligible population. Part of multi-layered strategy of conducting outreach in multiple ways including texts, digital ads, events, and collateral messaging.

The Ads have generated 1,081,865 impressions in the month of March, generating 8,927 clicks to the website and sign-up page.

Example of Digital Ad:



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:** N/A
- 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

Target Area	14-Rural
Reporting Period	March 1, 2019 - March 31, 2019
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
N/A	
Narrative of Success Stories	
N/A	

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	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	472

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Occupancy costs for web research/design staff/office: \$74.29,
 Web partnering research and web ad design staff: \$242.45
 Total: \$316.74

2) Provide a narrative of education and outreach activities conducted during the month under web:
 Provided web content to established and potential partners for posting to their sites. Updated content on ATCAA.org/eitc specific page and on mycaleitc.org page. Began contacting newly established partners and provided content to them that could easily be placed on their websites.

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

Of note: Due to ATCAA's foothill service area and the geographic range of the rural areas, ATCAA maintains a CalEITC page on its ATCAA website for those within ATCAA's service area. Additionally, it maintains a mycaleitc.org website that is essentially a landing page that directs folks to the caleitc4me.org site. The landing page was created in 2017 to direct visitors that reside outside of ATCAA's service area from social media and other sources to a site that was not regionally specific.

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

Social Media

Number of Facebook Posts	177*	Number of Tweets	5
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>Now taking appointments for the #FreeTaxPrep bus rolling into Jackson on April 1 & 2. If you earned \$54k or less, we can help you file free. If you earned \$25k or less, you might get cash-back with California's expanded #CalEITC. Learn more at https://www.atcaa.org/caleitc Call today: 209-268-6232. #ItsYourMoneyGetIt #VITA #Jackson #ATCAASince1981</p>		<p>Mr. & Mrs. T-Rex stopped by to learn about how they get their #CalEITC credit just by filing their taxes. Stop on by and see us at #DandelionDays #Jackson #itsyourmoneygetit pic.twitter.com/057jIZVKKw</p>	
Number of Other Posts (Instagram, etc.)	0	Exact Messaging of Most-Liked "Other" Post	
		<p>Technical difficulties with Instagram account in March.</p>	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Social media bilingual staff: \$631.13
 Social media design/development: \$318.53
 Occupancy costs for social media staffing: \$163.12,
 Stock video subscription,\$79.00,
 Total: \$1,191.78

2) Provide a narrative of education and outreach activities conducted during the month under social media:
 Continued regular postings to ATCAA and MyCalETC social media pages. Continued to research, find and join community group pages in rural regions to post and share CalEITC info on bulletin board pages. Stepped up bilingual research to identify influencers.

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: Provided a simple toolkit and shared it with established partners asking them to post to their pages.

*3 posts on mycaleitc FB page, 7 posts on ATCAA FB page, 167 posts into FB discussion groups and

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

message boards = 177 posts.
 Impressions for February as per CSD Reporting Media Guidelines
 Facebook: Impressions: 50,395 Engagement: 3,972
 Twitter: Impressions: 2,243 Engagement: 57
 Instagram: Technical problem with Instagram Account.
 You Tube (views): 12

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	302
Canvassing in Non-Targeted Zip Codes	n/a
New Individuals Who Received Text Messages	n/a
Phone Calls	n/a - See Other
Office Visits	n/a - See Other

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Bilingual outreach staff: \$144.27,
 Mileage vehicle costs for outreach staff for meetings/training & outreach: \$278.52,
 Occupancy costs for outreach staff: \$94.67,
 Total: \$517.46

2) Provide broad overview of canvassing for targeted zip codes: As outlined in Spcope of work, limited canvassing is being done within our own service area. Phone calls and office visits to business and organization canvassing is reported under "Other." Zip codes cavassed: 95642, 95640, 95621, 95601.

3) Provide a broad overview of canvassing for non-targeted zip codes:
 Canvassing in non-targeted zip codes is canvassing to established and potential partner organizations and businesses throughout the northen California rural county region. See Other.

Target Area	14-Rural
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. 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. The phone calls we conduct are to potential partner agencies, listed in Other 2, rather than to individuals.
- 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: Partnering with organizations outside our service area in rural Ca., counties to encourage canvassing by them to thier clients with EITC materials.

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	8	19,062	0	
Paid Radio Ads	90	31,440	0	
Public Services Announcements (Radio)	60	20,202	0	
Paid Television Ads	0		0	
Public Services Announcements (T.V.)	0		0	
Billboards	0		0	
Transit Advertisements	0		0	
Internet/Website Ads	3	44,380	0	
Social Media Promoted/Boosted Ads	5	59,046	2	25,312

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: \$978.82,
 Bilingual media ad design/messaging and placement staff: \$631.12,
 Paid ad placement: \$3,620.37
 Occupancy costs for Media staffing: \$637.92
 Total: \$5,868.23
- 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: Print and digital ads ran in Buy and Sell Press, MyMotherlode.com, Leger Dispatch, Pinetree.net, Mariposa Gazette and Amador Community News. Radio ads on KVML, KKBN, KZSQ, KVCG. Ran geo-targed ads on Facebook.
- 3) Provide information on whether or not any earned media obtained during the month. For each earned

Target Area	14-Rural	
Reporting Period	October 15, 2018 - November 30, 2018	
<p>3) Provide information on whether or not any earned media obtained during the month. If such earned media hit (internet, radio, T.V.), either provide an internet link to the article or attach to email sent to CSD: Earned media KVML/KZSQ and Pine Tree.net. Info attached.</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: Other: Negotiating with spanish radio stations.</p>		
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	26,987
	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: Copying charges: \$39.90, Office Equipment & Supplies, \$228.67, Occupancy costs: \$287.83, Design staff: \$1,095.36, Rrinting Costs: \$768.30, Total: \$2,420.06</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: Combination of posters and flyers hung. Distributed FTB brochures, in-house-CSD approved postcards, flyers and business card sized messaging. Areas distributed were Lake, Humboldt, Mendocino, Del Norte, Siskiyou, Colusa, Glenn, Butte, El Dorado, Tuolumne, Calaveras and Amador counties.</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: None.</p>		

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

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Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	95642	03/17/19	3,000	Yes
Community Gathering	95642	03/18/19	2,000	Yes
Educational Forum	95370	03/08/19	100	No
Resource Fair	95642	03/26/19	500	No
Educational Forum	95321	03/28/19	50	No

Narrative of Expenditures in EARS and Outreach Activities

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018
<p>1) List the various activity-expenditures charging for this month and their cost: Staffing and travel for events; \$530.26, Supplies and Equipment: \$311.41, Occupancy costs: \$141.99 Total: \$983.66</p> <p>2) Provide a brief overview of events conducted during the reporting period: Ran a CalEITC information booth at Dandelion Days , a free 2-day community event. Booth at Groveland Health Fair, Presented at Contruction trainee educational session, presented at gathering of community outreach leaders.</p> <p>3) If members of the press attended an event, indicate which press outlets: Press outlets at Dandelion Days were the Ledger Dispatch.</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: Added to calendar additional locations/events to set-up mini outreach booths.</p>	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<p>OTHER 1- CANVASS TO REGIONAL BUSINESSES. Occupancy costs for staffing: \$304.27, Staffing needed to research, develop and maintain business and partner lists, communicate and strategize needs including data collecting methods: \$384.26, Bilingual Outreach Staffing: \$1,893.39, Total OTHER 1 : \$2,581.92</p> <p>OTHER 2 - CANVASSING TO REGIONAL PARTNERS. Travel & Mileage Reimbursement: \$196.52, Occupancy costs for canvassing support staff: \$362.13, Canvassing support, research data collection staff, \$624.69,</p>	

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018
<p>Bilingual research and canvassing support staff, \$1,893.39, Total OTHER 2: \$3,076.73</p> <p>Targeted businesses and potential partners in Lake, Humboldt, Mendocino, Del Norte, Siskiyou, Colusa, Glenn, Butte, El Dorado, Tuolumne, Calaveras and Amador counties. Posting and delivering information to businesses and organizations in all above counties. Continued researching potential partners in El Dorado, Kings, Madera, Butte, Placer and Mariposa counties. Partnered with the following new -organizations in the following counties: Colusa county-10 Glenn county-14 Butte county-22 Lake county-17 Mendocino county-16 Humboldt county-13 Del Norte county-8 Lake county-17 Amdor County-4 Tuolumne County-7 Calaveras County-12 Total: 140 new partners in the above regions.</p>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>Short-staffed. Key staff member hired for Outreach season left for a permanent position elsewhere. 2nd staff member hired for Outreach and tax was needed full time in tax through 4/15.</p>	
Narrative of Success Stories	

Target Area	14-Rural
Reporting Period	October 15, 2018 - November 30, 2018
<p>Success Story #1 Date of Success Story: March, 2019 Name of Person from Success Story: Carol Coffey Zip-Code Where Person Lives: 95370 VITA Site where person got taxes done (if applicable): Sonora Narrative: Carol got a very unexpected refund and was thrilled. She is going to let us sit down with her for an interview and sign a photo release.</p> <p>Success Story #2 Date of Success Story: March, 2019 Name of Person from Success Story: Sharon Andresian Zip-Code Where Person Lives: 95370 VITA Site where person got taxes done (if applicable): Sonora Narrative: Sharon was thrilled with her refund and has given permission to allow us to film her. Short clip coming soon!</p> <p>Success Story #3 None 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 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	CAC of Santa Barbara		
Grantee Representative			
Telephone Number			
Email Address			
Contract Number			
Target Area			
Reporting Period	March 1, 2019 - March 31, 2019		
Web			
Category		Metrics	
EITC Website Hits		519	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: Community Service Director Salary \$138. 81 Program oversight 211 Program Manager \$1123.45 Provided update content verification for web designer gathered data for reporting from website contractor</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web: Push was made to promote the VITA site locations and text campaign for screening. Stills featuring benefits for women under EITC and the CALEITC Calculator</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>			
Social Media			
Number of Facebook Posts	46	Number of Tweets	34
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
The Earned Income Tax Credits rewards work and put's money back in the economy (attached Youtube Video)		"When Women Succeed, The Economy Succeed"	

Target Area		
Reporting Period		March 1, 2019 - March 31, 2019
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: CAC Program Manager \$138.81 Program oversight CAC Social media staff \$286.72 create content for post tracking and reporting \$130 FB Boosting Cost of CAC staff to create content and, post 20 post Ventura Program manager and social media staff \$1,134.05 Time for 2 Staff Members to develop, schedule and track post for the month English and Spanish Cost also includes Facebook Boost Expenditures for 60 social media post Outreach sub contractor \$540</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under social media: Post for this month featured highlights promoting eligibility for free tax preparation, locations and how to schedule appointments. Boosted post featured the commercial that was running on the local television promoting the 211 texting campaign for eligibility pre-screening. We also featured the benefits of women corresponding with National Women's month.</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: Posts had a total reach of 13,056 people and 906 Engagements</p>		
Canvassing		
Zip Code/Method of Outreach		Interactions
Canvassing in Targeted Zip Codes		109
Canvassing in Non-Targeted Zip Codes		
New Individuals Who Received Text Messages		
Phone Calls		

Target Area	
Reporting Period	March 1, 2019 - March 31, 2019

Office Visits

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
CACSB Program Manager **\$138.81** Program oversight and contractor training and webinar participation
211 Program Manger **\$1123.45** Content revision for pust to text campaign. Condcuted contractor meetings regarding data collection and confidentiality information used for tracking
Web page maintenance **\$2,625**
Promotora Outreach Contractor **\$550**
Attended Food banks, and health care screenings.
- 2) Provide broad overview of canvassing for targeted zip codes:
93101 Santa Barbara -----17 text during the month of March!
93103 Santa Barbara -----12 text during the month of March!
93105 Santa Barbara -----4 text during the month of March!
93108 Santa Barbara -----0 text during the month of March!
93109 Santa Barbara -----0 text during the mont of March!
93110 Santa Barbara -----4 test during the month of March!
93117 Goleta-----16 text during the month of March!
93437 Lompoc-----26 text sent during March.
93458 Santa Maria -----1 Text March
- 3) Provide a broad overview of canvassing for non-targeted zip codes: **See above**
- 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:

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads			2	166
Paid Radio Ads	30	2,800	164	4,200
Public Services Announcements (Radio)	60	1,001	63	
Paid Television Ads	39	3,101		
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads			4	8,467
Social Media Promoted/Boosted Ads				

Target Area	
Reporting Period	March 1, 2019 - March 31, 2019

Narrative of Expenditures in EARS and Outreach Activities

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

CAC Program Manager **\$138.81** program oversight
 KEYT Broad Commercial and web banner **\$2,350**
 El Latino Web and Circular Print Ad **\$2,141**
 Rincon Broadcasting Radio Ads **\$3,500** Ad promoted texting campaign
 Promotoras Outreach Contractor **\$180**
Dora Perez South County Promotores, did one Radio interview on EITC- 3/25/2019 -Radio Bronco KIST-FM 107.7.
Lompoc Promotora did radio interview on La Ley 3.1.19
North County one Radio interview March 15, 2019 on EITC- March La Ley FM 100.3

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:

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	658
Number of New Individuals who Received Direct Mailers	

Narrative of Expenditures in EARS and Outreach Activities

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

CAC Manager **\$138.81** Coordinated content and revision for mailer
 CAC Venturea **\$1,229.62** Front desk staff distribution of collateral and sign in sheet collection
 Promotoras Outreach Contractor **\$800**

Target Area	
Reporting Period	March 1, 2019 - March 31, 2019

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

Information was distributed at all community events and points of intake for Energy Services in both counties. Infomraiton also distributed to family meetings in Carpentaria and Santa Barbara Head Start Centers

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

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

Group Events

Total Number of Events Held During the Reporting Period			12	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	93101	03/02/19	20	no
Community Gathering	93105	03/16/19	9	no
Community Gathering	93117	03/03/19	11	no
Church	93436	03/03/19	66	no
Educational Forum	93436	03/14/19	10	no
Community Gathering	93436	03/24/19	13	no
Food Bank	93436	03/30/19	17	no
Food Bank	93458	03/21/19	80	no
Food Bank	93454	03/21/19	80	no
Food Bank	93030	03/07/19	77	no
Food Bank	93033	03/12/19	45	no
School	93033	03/26/19	11	no
Resource Fair	93454	03/24/19	40	no

Narrative of Expenditures in EARS and Outreach Activities

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

Target Area	
Reporting Period	March 1, 2019 - March 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>CAC Program Manager \$138.81 Program oversight CAC Ventura Staff scheduling \$554.00 Promotoras Outreach Contractor \$600</p> <p>2) Provide a brief overview of events conducted during the reporting period:</p> <p>Staff attended multipel food banks and distributed flyers to clients as they waited in lines for the services. Staff engaged them in conversation educating them to on EITC. Additional event was at parent meeting hosted by Mujeres y Nuestro Beinestar Emocional where presentation featuring CAP Ventura presenting on EITC</p> <p>3) If members of the press attended an event, indicate which press outlets:</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources:</p>	
Other	
Category	Actual (#)
Indirect Cost	
Narrative of Expenditures in EARS and Outreach Activities	
<p>CAC Indirect Cost \$1602.73</p>	

Target Area	
Reporting Period	March 1, 2019 - March 31, 2019

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Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

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>

Target Area	
Reporting Period	March 1, 2019 - March 31, 2019

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	March 1, 2019 - March 31, 2019		
Web			
Category		Metrics	
EITC Website Hits		34	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: JP Marketing Subcontractor Fees for website updates = \$190.00</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web: Update CalEITC 2018 webpage with links and images linked to FTB site calculator.</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>			
Social Media			
Number of Facebook Posts	11	Number of Tweets	22
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
United Way Fresno and Madera County representatives had great meetings today with @CASenCaballero (shown in the photo), @AndreasBorgeas, @JimPatterson559, @DrArambula advocating for ways to lift people out of poverty w/ leaders at @UWFMC #WomenUnited. Thx to Lindsay Callahan, UWFMC President and CEO; Sue Montgomery, SJVC; Kacey Auston and Susan Good for participating today. #Childcare #DualEnrollment #CalEITC #Safety.		First Partner Jennifer Siebel Newsom @CalEITC4Me pic.twitter.com/kuQ1EakkLy	
		Exact Messaging of Most-Liked "Other" Post	

Target Area	12-Fresno	
Reporting Period	March 1, 2019 - March 31, 2019	
Number of Other Posts (Instagram, etc.)	0	

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
JP Marketing Subcontractor Fees Social Media updates = \$95.00
- 2) Provide a narrative of education and outreach activities conducted during the month under social media:
 Posts were done on our social media sites of coordinated messaging that synced with UWCA media kits for the month of March and other posts to promote CalEITC and FTP services.
- 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

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	34888
Canvassing in Non-Targeted Zip Codes	824
New Individuals Who Received Text Messages	15680
Phone Calls	0
Office Visits	968

Narrative of Expenditures in EARS and Outreach Activities

- 1) List the various activity-expenditures charging for this month and their cost:
Total Expenses for this period: \$ 16470.05
Staff Salaries :\$ 6750.21
 CEO Personnel: \$59.67hr x 44hrs= \$2625.48
 Program Director: \$ 32.47hr x 35hrs= \$1146.60
 VTA PProgram Manager: \$25.57 x 47.50hrs =\$1214.58
 Outreach and Education Coordinator: \$20.92hr x 84.30hrs= \$1763.56

Service Fee for Tablets (Jan) : \$115.04
Subcontractor Fee Interface: \$9604.80 (211 Hotline Phone service)
- 2) Provide broad overview of canvassing for targeted zip codes:
Attended events and handed out Cal EITC and Free tax Prep flyers to families/students who attended.
Verbally shared recent changes to eligibility for tax credit, also Free tax Preparation site information

Target Area	12-Fresno
Reporting Period	March 1, 2019 - March 31, 2019
<p>verbally shared recent changes to eligibility for tax credit, also free tax preparation site information and answered question asked by families/students. Dropped off flyers to neighboring businesses to promote CalEITC event and FTP services at UWFM locations. Electronic school distribution to Fresno Unified School districts.</p> <p>3) Provide a broad overview of canvassing for non-targeted zip codes: Distributed flyers to rural communities where the FTB Bus was scheduled for the month of Feb</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: Received count of text messages that were sent out during March by our partner UWCA.</p> <p>5) Provide broad overview of Phone Calls conducted: Emails and text message where send this month to remind clients about their appt and review Cal EITC eligibility for tax credits. Received count of text messages that were sent out during</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: N/A</p>	

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads	22	68,000	22	55,000
Public Services Announcements (Radio)	7	10,850	7	8,750
Paid Television Ads	24	10,975	4	7,183
Public Services Announcements (T.V.)	17	2,724	4	681
Billboards				
Transit Advertisements				
Internet/Website Ads				
Social Media Promoted/Boosted Ads	1	316,941		

Narrative of Expenditures in EARS and Outreach Activities

Target Area	12-Fresno
Reporting Period	March 1, 2019 - March 31, 2019

1) List the various activity-expenditures charging for this month and their cost:
Total Expenses for this period: \$6290.20
Staff Salaries :\$ 882.66
CEO Personnel: \$59.67hr x 4hrs= \$238.68
Program Director: \$32.76 x 10.5hrs= \$343.98
Videographer Fee: \$300.00
Media Ad purchase Fee : \$5407.54
(Subcontractor Fee JP Marketing)

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:

See attached report

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:
See attached report

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

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	12,641
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:
Staff Salaries: \$1438.54
Material Distribution Salaries: \$12.12hr x 72.5 hrs = \$ 878.70
Coordination of Distribution Salaries \$18.07hr x 24.6 hrs= \$44.52
Mileage for distribution: \$115.32

2) Provide a broad overview of flyer/brochure and poster distribution:
Provided flyers to community events, community partners and local nonprofit organizatios in the area. Flyers contained information in regards to Cal EITC eligiblty for tax credits and Free tax Preparation sites in the area . School distribution to promote CalEITC event.

Subcontractor (CCLS): Flyers/brochrues and posters were distributed throught our targeted areas and beyond at community outreach events and at our main office tax assistance center. 1, 585 total flyers were distributed of which 159 were handed directly to individuals.

3) Provide a listing and narrative of direct mailers that went out:
No direct mailers went out this reporting period.

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

Target Area	12-Fresno
Reporting Period	March 1, 2019 - March 31, 2019

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Group Events

Total Number of Events Held During the Reporting Period	7
---------------------------------------------------------	---

Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	93706	03/01/19	70	No
Resource Fair	93706	03/12/19	70	No
Resource Fair	93727	03/16/19	700	Yes
Resource Fair	93711	03/21/19	60	No
Resource Fair	93721	03/29/19	100	No
Resource Fair	93722	03/29/19	100	No
Resource Fair	93638	03/31/19	80	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
Total Expenses for this period: \$82.79
 Office Supplies for event coordinator Costco: \$82.79

2) Provide a brief overview of events conducted during the reporting period:
Events were community gathering, resource fairs and schools. Cal EITC and Fre Tax Preparation flyers were passed out to families and students eligibility for tax credit

3) If members of the press attended an event, indicate which press outlets:
Fresno Bee , Univision, ABC News attended March 16 CalEITC Resource Fair

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

Other

Category	Actual (#)
Grantee Meetings	3
Partner Meetings	28
Adminstrative/ Reporting	4

Narrative of Expenditures in EARS and Outreach Activities

Target Area	12-Fresno
Reporting Period	March 1, 2019 - March 31, 2019

Administrative Costs for Mar: \$ 3300.97

Grantee Required Staff Meetings for Mar : \$469.00
 Program related meetings with Partners and Subcontractors for Mar: \$ 2263.19
 Adminstrative/ Reporting with Program Staff for Mar: \$568.79

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

No challenges this month.

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:

Target Area	12-Fresno
Reporting Period	March 1, 2019 - March 31, 2019

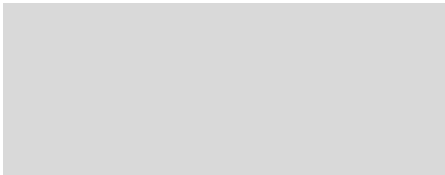
State of California DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT 2018 Cal EITC Grant Progress Report CSD 171PR (Rev. 11/18)		2018 Cal EITC Education and Outreach Grant Monthly Progress Report	
Grantee Organization Name		Community Action Partnership of Kern	
Grantee Representative		Sandi Truman	
Telephone Number		661-834-1724	
Email Address		struman@capk.org	
Contract Number		18T-8012	
Target Area		10-Kern/Tulare	
Reporting Period		March 1, 2019 - March 31, 2019	
Web			
Category		Metrics	
EITC Website Hits		563	
Narrative of Expenditures in EARS and Outreach Activities			
<p>1) List the various activity-expenditures charging for this month and their cost: \$1,510 to include staff, CSET Sub Contract, office supplies, and 10% Indirect.</p> <p>2) Provide a narrative of education and outreach activities conducted during the month under web: CAPK: CAPK's Kern CalEITC Web Page is live, http://kerneitc.org with links to the CAPK Home Page and CalEITC4me. The CAPK Web site VITA page had 469 hits and has links to the Kern CalEITC page. Staff is actively posting on social media and will continue to the end of the contract period.</p> <p>CSET: The CSET CalEITC webpage address was featured on Social Media in: 2 Facebook posts, 2 Instagram Posts, and 2 Twitter posts as well as in EDDM postcards. A number of the transit advertisements also feature CSET's CalEITC web address.</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>			
Social Media			
Number of Facebook Posts		Number of Tweets	
14		5	
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	

Target Area	10-Kern/Tulare
Reporting Period	March 1, 2019 - March 31, 2019

CAPK: If you haven't done so, make sure you do your taxes before the deadline on April 15th! You may also qualify for Earned Income Credits for both the State and Federal. For more information, visit <https://www.caleitc4me.org/> and find out if you qualify for Earned Income Credit for a chance at a little extra on your tax return!

CSET: Tulare County residents can file their taxes FREE with our certified tax preparers. Learn how you can qualify for federal and California income tax credits (#caleitc #eitc). Do not wait. Visit one of our Saturday locations in: #visalia #tulare #porterville #cutler (More information at www.cset.org/caleitc).....Los residentes del condado de tulare pueden declarar sus impuestos GRATIS con nuestros preparadores de impuestos certificados. Aprenda cómo puede calificar para los créditos de impuestos federales y de California. (#caleitc #eitc). ¡No espere! Visite uno de nuestros locaciones los sábados en: #visalia #tulare #porterville #cutler (Más información en www.cset.org/caleitc)

CSET: #TaxDay is less than a month away. Don't wait! Visit one of our #tularecounty locations and get your taxes done FREE!



Target Area	10-Kern/Tulare
Reporting Period	March 1, 2019 - March 31, 2019

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	7,530
Canvassing in Non-Targeted Zip Codes	700
New Individuals Who Received Text Messages	
Phone Calls	99,976
Office Visits	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 \$4,302 includes staff, CSET Sub Award, office supplies, and 10% Indirect.

2) Provide broad overview of canvassing for targeted zip codes:
CAPK: 730 face to face canvassing took place at the following zip codes:
 93307, 93308, and 93309
CSET: 1,900 face to face canvassing took place at the following zip codes:
 93277, 93291
 4,900 face to face canvassing took place at the following zip codes:
 93247, 93257

3) Provide a broad overview of canvassing for non-targeted zip codes:
CSET: 700 face to face canvassing took place at the following zip codes:
 93221, 93244, 93256, 93270, 93274, 93286

4) Provide broad overview of text messages sent out, including the total number of text messages sent:
 None

5) Provide broad overview of Phone Calls conducted:
CAPK: received over 1,900 calls to CAPK's 2-1-1 Information and Referral line and scheduled over 1,350 appointments.
CSET: A total of **99,676** Tulare County residents received a phone call this month through the county's notification system, AlertTC

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:

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions

Target Area	10-Kern/Tulare			
Reporting Period	March 1, 2019 - March 31, 2019			
Printed Ads				
Paid Radio Ads				
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards	4	431,928		
Transit Advertisements	31	23,760	20	15,840
Internet/Website Ads				
Social Media Promoted/Boosted Ads	2	355,106		

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 \$4,314.19 includes staff, CSET Sub Contract, office supplies, printing for Bus Ads, and 10% indirect.

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:

Billboards: Promoting EITC and VITA in three key locations in Bakersfield, as follows :

South Union Ave. 54,111 weekly impressions

East Truxton Ave. 20,264 weekly impressions

Chester Ave. 33,607 weekly impressions

In April, ads will be in all 95 Golen Empire Transit (GET) buses and CAPK has scheduled radio and TV ads promoting EITC/CalEITC and connecting people to VITA.

CSET:

Transit Advertisements:

A total of 9 interior and 1 exterior Porterville bus ads ran in March. The interior bus ads will run into next month. A total of 20 interior and 1 exterior Visalia bus ads ran in March. The exterior bus ad will run into next month. A projected total of **39,600** transit ad impressions took place during the month of March targeting the communities of Visalia, Porterville, and Lindsay (60% of projected total impressions). The breakdowns of English and Spanish are based off of the number of ads running in each language.

Social Media Promoted Advertisements:

CSET's Social Media ad campaign is still running effectively. Impressions for the month of March include:

271,582 impressions through Facebook and Instagram

83,524 impressions through Twitter

Total of 355,106 impressions for March across Tulare County.

(The same ad sets are running continually from January through April) Images provided previously.

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:

CAPK: CAPK received 17,394 views from local TV News stories about CAPK VITA, EITC, and CalEITC (TV Eye Report attached)

Target Area	10-Kern/Tulare
Reporting Period	March 1, 2019 - March 31, 2019
Eyes report attached.	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	1,892
Number of New Individuals who Received Direct Mailers	12,000

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 \$3,188 includes includes staff, CSET Sub Contract, office supplies, printing, and 10% indirect.

2) Provide a broad overview of flyer/brochure and poster distribution:
CAPK: Staff made three visits to the The Hope Center, (a CAPK Food Bank partner food distribution site) and gave out **280 English** and **98 Spanish** brochures.
 Staff also distributed **383 English** and **506 Spanish** brochures at the Kern Fair Grounds Swap Meet.
CSET: 93274 - 25 flyers reaching 200 individuals
 93277 - 75 flyers reaching 400 individuals
 93286 - 25 flyers reaching 200 individuals
 93257 - 275 flyers reaching 4000 individuals
 93247 - 50 flyers reaching 1000 individuals
 93291 - 50 flyers reaching 1000 individuals
 93221 - 50 flyers reaching 250 individuals
 93244 - 25 flyers reaching 200 individuals

3) Provide a listing and narrative of direct mailers that went out:
CSET: EDDM postcards were mailed to 12,000 households residents in 93618, 93223, 93286, 93615, 93235, and 93270 zip codes. Dates and times of VITA sites and links to CSET's VITA and CalEITC websites were included in the EDDM.

4) Any other additional information pertinent to work conducted including leveraging of other resources:
CSET:
 3/1/2019-Safe Care Parent Educator meeting-30 participants from 93615, 93247, 93286
 3/12/2019-FRC meeting with HHSA - 93291-15 attendees
 3/13/2019-Family Services in 93274 & 93219 presentation about services - 9 staff

Target Area	10-Kern/Tulare			
Reporting Period	March 1, 2019 - March 31, 2019			
3/21/2019-HHSA CWS meeting-30 attendees 3/25/2019-Rotary-93291-3 attendees 3/28/2019-CSET Leadership meeting-18 attendees				
Group Events				
Total Number of Events Held During the Reporting Period			0	
Location	Zip Code	Date	Attendance	Press at Event?
Stuff the Bus	93304	03/29/19	60	Yes
Free Tax Prep	93291	03/02/19	67	No
Free Tax Prep	93291	03/09/19	59	No
Free Tax Prep	93291	03/16/19	51	No
Free Tax Prep	93291	03/23/19	41	No
Free Tax Prep	93291	03/30/19	62	No
Free Tax Prep	93257	03/02/19	48	No
Free Tax Prep	93257	03/09/19	29	No
Free Tax Prep	93257	03/16/19	35	No
Free Tax Prep	93257	03/23/19	35	No
Free Tax Prep	93257	03/30/19	43	No
1) List the various activity-expenditures charging for this month and their cost: \$1766.36 includes Staff, CSET Sub Contract, supplies, and 10% Indirect 2) Provide a brief overview of events conducted during the reporting period: CAPK: Staff had a booth at the Annual Stuff the Bus event and Resource Fair. This event is a partnership between CAPK and GET Bus, the regional transit provider for Bakerfield and Kern County. CSET: As taxpayers were being screened, they were told about Cal EITC. Presentations were done at: Lindsay Family Resource Center, the Employment Connection in Visalia and Porterville, 3) If members of the press attended an event, indicate which press outlets:				

Target Area	10-Kern/Tulare
Reporting Period	March 1, 2019 - March 31, 2019
<p>3) If members of the press attended an event, indicate which press outlets.</p> <p>CAPK: The Stuff the Bus event received local TV news coverage local news viewership of 22,756 (See Attached TV Eyes Report)</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources:</p> <p>CSET: OTHER GROUP EVENTS: FREE TAX PREP - 93274 - 3/2/2019 - 37 - NO FREE TAX PREP - 93274 - 3/9/2019 - 32 - NO FREE TAX PREP - 93274 - 3/16/2019 - 22 - NO FREE TAX PREP - 93274 - 3/23/2019 - 19 - NO FREE TAX PREP - 93274 - 3/30/2019 - 21 - NO FREE TAX PREP - 93615 - 3/2/2019 - 34 - NO FREE TAX PREP - 93615 - 3/9/2019 - 20 - NO FREE TAX PREP - 93615 - 3/16/2019 - 29 - NO FREE TAX PREP - 93615 - 3/23/2019 - 24 - NO</p> <p>FREE TAX PREP - 93615 - 3/30/2019 - 32 - NO JOB SQUAD PRESENTATION - 93291 - 3/12/2019 - 75 - NO JOB SQUAD PRESENTATION - 93291 - 3/26/2019 - 75 - NO JOB SQUAD PRESENTATION - 93257 - 3/5/2019 - 55 - NO JOB SQUAD PRESENTATION - 93257 - 3/19/2019 - 50 - NO TALKED TO HEAP CLIENTS - 93257 - 3/6/2019 - 10 - NO TALKED TO HEAP CLIENTS - 93291 - 3/12/2019 - 10 - NO</p>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
Type Text Here	
Narrative of Success Stories	
<p>CAPK Success Story #1 Date of Success Story: March, 2019 Name of Person from Success Story: General</p>	

Target Area	10-Kern/Tulare
Reporting Period	March 1, 2019 - March 31, 2019
<p>Name of Person from Success Story: General</p> <p>Zip-Code Where Person Lives: N/A</p> <p>VITA Site where person got taxes done (if applicable): CAPK VITA 19th Street</p> <p>Narrative: Due to the increased outreach efforts, CAPK VITA continues to see increases in the number of people coming in for tax return services and those who qualify for the CalEITC and EITC.</p> <p>CSET Success Story #2</p> <p>Date of Success Story: March, 2019</p> <p>Name of Person from Success Story: Several</p> <p>Zip-Code Where Person Lives: 93274, 93219, 93272, 93618</p> <p>VITA Site where person got taxes done (if applicable): Tulare, Visalia, Cutler, Porterville</p> <p>Narrative: We had several taxpayers come in with the post cards that were mailed out. They were very happy with the process and all received refunds in both Federal and State.</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-8011
Target Area	9-San Bernardino
Reporting Period	March 1, 2019 - March 31, 2019

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; all Web activities are conducted through the 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

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: N/A; all Social Media activities are conducted through the Statewide grant.

Target Area	9-San Bernardino
Reporting Period	March 1, 2019 - March 31, 2019

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

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	2628
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	60,486
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 and Part-Time Texters: \$5,000
 Grassroots Organizers: \$1,000
 Grassroots Coordinators: \$4,000
 Total Canvassing: \$10,000

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

GSO Organizers and partners Time for Change, COPE, Canvassed neighborhoods in targeted zip codes throughout San Bernardino at 22 different canvassing events and 8 different presentations.

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

Target Area	9-San Bernardino
Reporting Period	March 1, 2019 - March 31, 2019

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

GSO staff and volunteers sent texts to 60,486 unique contacts in San Bernardino county, The texts sent were either one of the four messages that are being tested from this texting program. We also did texting specifically around events in the community. We texted that there were free tax services in their area and that they can call to make an appointment. We have seen it help get some appointments by calling the number after receiving the text.

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

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	6	688,649	0	0

Narrative of Expenditures in EARS and Outreach Activities

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

Facebook Digital Ads and Boosts: \$11,425
 GSO Staff and Consulting: \$6,500
 Media Total: \$17,925

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:

Facebook Ads directly targeted at newly eligible population and general Cal EITC eligible population. Part of multi-layered strategy of conducting outreach in multiple ways including texts, digital ads, events, and collateral messaging.

Target Area	9-San Bernardino
Reporting Period	March 1, 2019 - March 31, 2019

The Ads have generated 688,649 impressions in the month of March, generating 4,640 clicks to the website and sign-up page.

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

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	157,000
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: 4,640
Multilingual Collateral Printing: \$ 6,480.97

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

CalEITC4Me Eligibility Chart - 50,000
Benefits Checklist - 5,000
Resource Wheel - 100,000
Younger CA flyer: 2,000

Partners Include: Time for Change Foundation, COPE

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

Group Events

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

Target Area	9-San Bernardino
Reporting Period	March 1, 2019 - March 31, 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 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	March 1, 2019 - March 31, 2019

Web

Category	Metrics
EITC Website Hits	2587

Narrative of Expenditures in EARS and Outreach Activities

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

We continued to update our website as new site information came in and also refreshed our home page to make it more user friendly. UWWC and CAP Sonoma also continued to make website adjustments. The total costs for web for March were \$724.57 including:

- \$438.04 for UWBA staff salaries and rent
- \$239.13 for CAP Sonoma staff salaries and rent
- \$47.40 in administrative costs

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

UWBA, UWWC, and CAP Sonoma all have Cal EITC webpages and had the following visitors:

- 80 (UWBA)
- 422 (CAP Sonoma)
- 2,085 (UWWC)

UWBA also had 4,317 visitors overall in addition to the 80 specifically to our Cal EITC 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:

All of our media including transit, social, television and radio, and online, encourages visitors to the websites where they can get the most information.

Social Media

Number of Facebook Posts	31	Number of Tweets	18
--------------------------	----	------------------	----

Target Area	8-Contra Costa/Sonoma
Reporting Period	March 1, 2019 - March 31, 2019
Exact Messaging of Most-Liked Facebook Post	Exact Messaging of Most-Favorited Twitter Post

#TaxDay is quickly approaching. Make sure you file Vroom Vroom!
for #free with us! <https://earnitkeepitsaveit.org/find-tax-help-now/>

#VITA #california #IRS #TaxCredits #Refund #Finance



Target Area	8-Contra Costa/Sonoma
Reporting Period	March 1, 2019 - March 31, 2019
Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1463
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	23486
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 continued to organize canvassing primarily through phone and text, as well as a bit on the ground through CAP Sonoma. The total costs for canvassing were \$20,754.79 including:
 - \$504 for UWBA staff salaries and rent
 - \$15,000 (one time payment for the season) to Contra Costa Crisis to support EITC outreach for 211 in that county
 - \$3,893 for CAP Sonoma staff salaries and rent
 - \$1,357.79 in administrative costs

- 2) Provide broad overview of canvassing for targeted zip codes:
 CAP Sonoma had direct interactions or left materials for 1,463 households in Sonoma County, starting canvassing efforts from 25 different locations throughout the region.

- 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:
 Through GSO, peer-to-peer text messaging continued in earnest in March with over 50,000 texts sent in total regionally. In partnership with UC Berkeley, GSO completed our message testing to help determine what messaging is most effective in getting potential filers to file.

- 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

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	2		1	
Paid Radio Ads	295	311,755	165	560

Target Area	8-Contra Costa/Sonoma			
Reporting Period	March 1, 2019 - March 31, 2019			
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	21	531,212	11	131,600
Public Services Announcements (T.V.)	0	0	2	10,991
Billboards	12	1,283,964	0	0
Transit Advertisements	33	788,459	0	0
Internet/Website Ads	3	264,064	2	158,458
Social Media Promoted/Boosted Ads	4	654,971	4	66,728

Narrative of Expenditures in EARS and Outreach Activities

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

Media costs continue to be for staff working on media buys and design as well as costs associated with purchasing ad space and time including television, radio, social media, outdoor, and transit. The total costs for media for March were \$27,312.40 including:

- \$1,408.05 in UWBA staff salaries and rent
- \$67.44 in UWBA signage costs
- \$5,335.20 for television and online ads for Contra Costa County
- \$2,565 for outdoor ads in Contra Costa County
- \$964.20 for UWBA social media (Facebook and Twitter) ads
- \$10,000 in additional payments to UWWC for additional radio buys
- \$5,185.72 for UWWC radio and transit advertising
- \$1,786.79 in administrative 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:

The impressions above are combined from CAP Sonoma (social media, print, and radio), UWWC (transit, radio, social, and online), GSO (social), and UWBA (television, English radio, outdoor, transit, social, and online). We have continued promote free tax preparation and the Cal EITC through as many platforms as possible running both television and radio ads in English and Spanish as well as many promotions online and via social media. We are still waiting on final reports for print advertisements in Sonoma County. In addition to the impressions reported above, UWBA also purchased ads on Chinese television and online platforms. The total paid television impressions was 336,408, the total online ads was 7,580, and the total social media ads were 12,330.

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:

UWBA had a story with our staff person, Ana Lagunas, run twice on Univision.

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

Target Area	8-Contra Costa/Sonoma
Reporting Period	March 1, 2019 - March 31, 2019

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	600
Number of New Individuals who Received Direct Mailers	100

Narrative of Expenditures in EARS and Outreach Activities

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

The total costs for collateral messaging were \$192.62 including \$180.02 for mailing by UWBA partners and \$12.60 in administrative costs.

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

UWBA sent out 100 postcards to our partners in Contra Costa County and UWWC distributed 500 materials throughout Sonoma County.

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

UWBA partners sent approximately 100 mailers out to clients in Concord and throughout Contra Costa County.

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

As mentioned previously in our other reports, we have distributed more than 100,000 postcards throughout our full region to community centers, schools, stores, and other locations. The distribution earlier in the season keeps these centers stocked through April.

Group Events

Total Number of Events Held During the Reporting Period			4	
Location	Zip Code	Date	Attendance	Press at Event?
School	95407	03/07/19	25	No
Community Gathering	95407	03/08/19	350	No
Free Tax Prep	95407	03/01/19	15	No
Free Tax Prep	94931	03/29/19	25	No

Target Area	8-Contra Costa/Sonoma			
Reporting Period	March 1, 2019 - March 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

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

We continued to incur costs for staff time working on planning and staffing group events. The total costs for March were \$1,137.84 including:

- \$498.45 for UWBA staff salaries and rent
- \$111.20 for CAP Sonoma salaries and rent
- \$453.76 for UWWC costs
- \$74.43 in administrative costs

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

CAP Sonoma staff attended school events in March to meet with parents and community members and provide information. One event took place at an early childhood education center. The larger event took place at Roseland Elemnetary School Community Pozole night. The Sonoma County EKS Ad-Hoc team held two special tax events for youth during the month of March. A mobile volunteer team of 5-7 traveled to two locations in Santa Rosa and Cotati to prepare taxes for a special group of at-risk youth.

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:

The Conservation Corps North Bay event provides the opporunity for United Way of the Wine Country to partner with their local Redwood Credit Union to provide an hour workshop prior to the youth filing their taxes to talk about tax-time savings and no-cost banking options for the youth.

Other	
Category	Actual (#)

Target Area	8-Contra Costa/Sonoma
Reporting Period	March 1, 2019 - March 31, 2019

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Many clients who received canvassing outreach had already filed by the time they were reached.

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:

Target Area	8-Contra Costa/Sonoma
Reporting Period	March 1, 2019 - March 31, 2019
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 Cal EITC Education and Outreach Grant Monthly Progress Report

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	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	18097

Narrative of Expenditures in EARS and Outreach Activities

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

Web Updates (**\$900**)

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

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

OCUW Tax related pages **7,933** 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) **10,164** 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 and updated which includes an additional blog section on the OCFTP microsite. The OCFTP microsite is continually updated and content analyzed in relation to web hits. The digital ad campaign began in January and has increased the number of website hits considerably. Additionally the flyers, bus ads, and

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019
<p>promotional materials have the viewer go to ocfrreetaxprep.com for more information.</p>	

Social Media

Number of Facebook Posts	17	Number of Tweets	32
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
Orange County United way partners with the Internal Revenue Service (IRS), other nonprofits and local businesses in Orange County to bring Orange County residents the #OCFreeTaxPrep campaign. In this		I thank you Asm @TylerDiep for honoring all our @unitedwayoc #OCFreeTaxPrep #VITA volunteers! It was a great morning with the @CalFTB eBus & @OCWestminster. Thanks @VoteAndrewDo 4 promoting this free service 2 the	
Number of Other Posts (Instagram, etc.)		Exact Messaging of Most-Liked "Other" Post	
9		The Earned Income Tax Credit (EITC) can put money back in your pocket. This credit was designed with working families in mind, and many Orange County families will qualify for hundreds or even thousands of dollars back! Learn more	

Narrative of Expenditures in EARS and Outreach Activities

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

NA - The budget for Social Media was fully expended.

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

OCUW (7 FB) (26 Tweets) (5 Instagram)
CHIOC (4 FB)
SOS (2 FB) (2 Tweets) (2 Instagram)
CAPOC (4 FB) (4 Tweet) (2 Instagram)

CHIOC posted 4 Facebook posts, reaching 354 people. The most successful post was posted on March 12th (Self-employed post) reaching 99 people, 3 engagements, and 2 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:

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019

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Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	355
Canvassing in Non-Targeted Zip Codes	125
New Individuals Who Received Text Messages	0
Phone Calls	79
Office Visits	599

Narrative of Expenditures in EARS and Outreach Activities

- 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 **(\$15,250)**
 Texting Campaign with 211 OC **(\$2000)**. For a **Total \$17,250**

- 2) Provide broad overview of canvassing for targeted zip codes:
SOS Canvassed two neighborhoods in Costa Mesa Target zip code 92627 (March 9th and 30th) and was able to interact face to face with **185 residents**.
CAPOC Canvassed **70** in Westminster zip code 92683 and **100** in Anaheim zip code 92804. Addresses were collected for data to be sent to FTB.

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

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019

CAPOC Canvassed **125** in Anaheim zip code 92805. Addresses were collected for data to be sent to FTB.

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

OCUW employed 211 OC to facilitate a texting campaign for OC Free Tax Prep 2019 tax season. Their client list serves the low income community. The 3rd and final text was sent in March as a final reminder. **27,958 successful text messages sent.** (17,043 English/10,915 Spanish). These were duplicated recipients so not included in March interactions. *See attached report for March.*

5) Provide broad overview of Phone Calls conducted:

CHIOC 79 calls were made to clients to remind them of CalEITC and to see if they used any of the free tax filing assistance. Messages were left reminding them about CalEITC and free tax filing services.

Canvassing Narrative Continued in OTHER.

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	2	27,000		
Paid Radio Ads			15	153
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements	70	248,783	70	248,783
Internet/Website Ads	4	34,847		
Social Media Promoted/Boosted Ads	6	11,294	1	280

Narrative of Expenditures in EARS and Outreach Activities

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

Digital Ad Spend- management fees, reporting, analysis **(\$250)** Digital Ad Spend- ad purchase **(\$250)** Transportation Advertising-bus wraps March **(\$12,000)** Public Relations **(\$2000)** For a total **\$14,500**

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:

Spanish Radio

15 Spots between 3/6-3/9 to promote the e-bus events as an addition to our contract.

La Ranchera proposed reach for 220 spots is 496,000.

Recommend 496,000 / .220 = 2254 impressions. 2254 / .220 = 10 impressions/spot.

Bus Ads Exterior and Interior cards 1/2 English/Spanish

2 weeks 1/21-3/17 1 Weeks exterior impressions 5 177 600 +1 weeks interior impressions

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019
<p>8 weeks 1/21-3/17, 4 weeks exterior impressions 3,477,000 + 4 weeks interior impressions 493,200=5970800, 1 week = 1,492,700 divided by 3 reporting periods= 497,666 impressions March 1/2 Eng/Span (248,783)</p> <p>Digital Ad Campaign Reporting March Impressions: Google 321,138 '/. 31 X 3 = 31,077, Facebook English 67,769 '/. 6 = 11,294 Facebook Spanish 8,668 '/. 31 = 280</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>3/1/19 Daily Pilot 418,500 views per month (13,500 Impressions/day) 3/7/19 Daily Pilot 418,500 views per month (13,500 Impressions/day) 3/12/19 Nguoi Viet Online 60,000 circulation (1935 Impressions per day) https://www.nguoi-viet.com/little-saigon/khai-thue-mien-phi-tai-trung-tam-sinh-hoat-cong-dong-westminster/ 3/28/19 Nguoi Viet Online 60,000 circulation (1935 Impressions per day) https://www.nguoi-viet.com/nguoi-viet-english/how-to-get-free-help-with-your-tax-preparation/</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: OCUW digital manager secured 105,564 impressions through Google grant ads. As a non-profit we are eligible to receive. 105,564 '/. 28 days = 3,770 added to Internet/Website ads. 3/21//19 OCUW Blog- 3 e-bus events https://www.unitedwayoc.org/blog/orange-county-united-ways-ebus-pulls-over-for-free-tax-prep/</p>	

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	9,401
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>Print & Distribution (\$1564.78), Mailing & Postage (\$159.75) TOTAL \$1,724.53</p> <p>2) Provide a broad overview of flyer/brochure and poster distribution: OCUW</p>

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019

88 Community Flyers and **137** CalEITC brochures English, Spanish and Vietnamese distributed during **3 E-Bus Events**: Costa Mesa Community Senior Center (zip code 92627), Assemblywomen Sharon Quirk Silva's District Office in Buena Park (zip code 90620) and Westminster Senior Center (zip code 92683). Also distributed **1,149** Community Flyers and **773** CalEITC brochures during 4 CalEITC/Free Tax Prep (FTP) Presentations/Educational Forums in Santa Ana (zip codes 92701 and 92703) and Anaheim (zip code 92802); and a presentation to the services providers of a Family Resource Center in Anaheim (zip code 92802). Special distribution of **2,815** English Free Tax Prep flyers to 14 local elementary schools in Santa Ana.

CHIOC

1,000 flyers distributed to clients at partner sites and events.
450 brochures distributed at events and to clients at partner sites.

SOS

1,476 flyers and brochures distributed at community events and office visits.
450 flyers and brochures distributed during canvassing.

CAPOC

56 clients were given flyers at the end of utility assistance appointments. **890** clients were given flyers while waiting in line for food assistance in food banks. **100** clients were given flyers at the end of community meetings at low income housing complexes. **17** posters were distributed to businesses.

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**

More details provided in the Group Event Narrative.

Group Events

Total Number of Events Held During the Reporting Period			56	
Location	Zip Code	Date	Attendance	Press at Event?
Bus Tour	92627	03/01/19	25	Yes
Educational Forum	92703	03/05/19	80	No
Educational Forum	92802	03/06/19	11	No
Bus Tour	90620	03/08/19	26	Yes
Educational Forum	92802	03/09/19	15	No

Target Area	7-Orange			
Reporting Period	March 1, 2019 - March 31, 2019			
Bus Tour	92683	03/10/19	50	Yes
Educational Forum	92701	03/26/19	20	No
School	90680	03/01/19	51	No
Resource Fair	92804	03/02/19	65	No
Resource Fair	90620	03/05/19	162	No
Health Care Clinic	90620	03/05/19		No
School	92801	03/08/19	25	No
Resource Fair	92870	03/09/19		No
Educational Forum	92705	03/12/19	35	No
Educational Forum	90621	03/12/19	45	No
School	92691	03/13/19	50	No
School	92843	03/13/19		No
Health Care Clinic	92866	03/20/19		No
Health Care Clinic	92866	03/20/19	50	No
Resource Fair	92675	03/22/19	100	No
Health Care Clinic	90620	03/28/19	118	No
Educational Forum	92630	03/28/19	30	No
Educational Forum	92630	03/28/19	30	No
Health Care Clinic	92627	03/05/19	123	No
Food Bank	92627	03/11/19	116	No
Food Bank	92627	03/12/19	112	No
Food Bank	92627	03/13/19	95	No
Food Bank	92627	03/14/19	64	No
Educational Forum	92626	03/14/19	36	No
Food Bank	92627	03/15/19	104	No
Food Bank	92627	03/18/19	125	No
Food Bank	92627	03/19/19	134	No
Food Bank	92627	03/20/19	109	No
Food Bank	92627	03/21/19	108	No
Food Bank	92627	03/22/19	105	No
School	92627	03/27/19	52	No
School	92626	03/28/19	70	No

Target Area	7-Orange			
Reporting Period	March 1, 2019 - March 31, 2019			
Free Tax Prep	92841	03/04/19	8	No
Free Tax Prep	92841	03/05/19	8	No
Free Tax Prep	92841	03/06/19	8	No
Community Gathering	92805	03/06/19	50	No
Community Gathering	92805	03/07/19	50	No
Free Tax Prep	92841	03/11/19	8	No
Free Tax Prep	92841	03/12/19	8	No
Food Bank	92804	03/14/19	45	No
Food Bank	92805	03/14/19	100	No
Food Bank	92802	03/17/19	75	No
Free Tax Prep	92841	03/18/19	8	No
Food Bank	92802	03/18/19	100	No
Food Bank	92804	03/19/19	125	No
Food Bank	92804	03/19/19	80	No
Free Tax Prep	92841	03/20/19	8	No
Food Bank	92805	03/21/19	100	No
Food Bank	92801	03/25/19	100	No
Food Bank	92801	03/27/19	90	No
Food Bank	92805	03/28/19	75	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 (**\$3,102.88**) OC Free Tax Prep Project Coordinator (**\$1804**)
 Three CalEITC Awareness/Free Tax Prep e-bus event marketing, promotion, public relations, signage
 (**\$6,850**) For a **total \$11,756.88**

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

See additional copy in attached Group Events Narrative.

OCUW

3/01, 08, 10 E-Bus Events

3/05, 06, 09, 26 Educational Forum

CHIOC

3/02, 05, 09, 22 Resource Fair

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019

3/05, 20, 28 Health Care Clinic
3/12, 28 Educational Forum Wellness Center and Heart Orange USD
3/01, 08, 13, 27 School- Know Your Benefits Presentations
3/02 Orange County Mental Health Summit
3/05 Clinic at the Park
3/09 CalFresh Collaborative PYLUSD Wellness Fair
3/13 Community Expo
3/20 OC Wellness Center Health Fair
3/28 Community Forum Santa Ana.
SOS
3/05, Health Care Clinic
3/11, 12, 13, 14, 15, 18, 19, 20, 21, 22 Food Distribution
3/14, 27, 28 Educational Forum
CAPOC
3/04, 05, 06, 11, 12, 18, 20 Free Tax Prep
3/14, 17, 18, 19, 21, 25, 27, 28 Food Bank
3/06, 07 Community Gathering

3) If members of the press attended an event, indicate which press outlets: **See Group Narrative attached.**

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

Other	
Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Canvassing Continued:

5b) Provide broad overview of Office Visits conducted:

SOS 123
Clients who met with staff or a volunteer to obtain services from organization were provided with a CalEITC/Free Tax Prep flyer. This included clients within target zip code 92627 and surrounding city of Costa Mesa.

CHIOC 476
Clients who met with staff or a volunteer to obtain services from organization were provided with a CalEITC/Free Tax Prep flyer across the following sites managed by CHIOC: Anaheim WIC - 92801, Buena

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019
<p>Park WIC - 90621, HOPE Clinic - 92627, Placentia WIC - 92870, Santa Ana HCA - 92706, B&G Club Santa Ana - 92703, Santa Ana WIC West - 92704, Corbin FRC - 92704, Kid Works - Santa Ana - 92703, Westminster County Field office Westminster 92683, Behavioral Health Anaheim -92806, Santa Ana Probation office- 92701, Behavioral Health Santa Ana -92701 and Behavioral Westminster office -92683.</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 is partnering with 3 sub-grantees for specific CalEITC canvassing, education and outreach activities in the following target zip codes:</p> <p>.</p> <p>Community Health Initiative of Orange County (CHIOC) \$5000 92701 and the surrounding City of Santa Ana including phone calls and office visits. In the month of March, CHIOC posted social media, made phone calls, enrollment counselors conducted 1:1 office visits, and conducted outreach through group events.</p> <p>Community Action Partnership of Orange County (CAPOC) \$5000 92683, 92804 and the surrounding cities of Westminster and Anaheim In the month of March, EITC outreach coordinator posted social media, canvassed in targeted and non-targeted zip codes, distributed literature and attended group events.</p> <p>Share Our Selves (SOS) \$5250 92627 and the surrounding city of Costa Mesa In the month of March, CalEITC coordinator posted social media, canvassed in targeted zip code, distributed collateral through group, food bank and health care clinic events. SOS adding CalEITC and Free Tax Prep flyers during 1:1 client office visits.</p>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
Narrative of Success Stories	
<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	

Target Area	7-Orange
Reporting Period	March 1, 2019 - March 31, 2019

See narrative in attached Continuation Narrative of Success Stories.

OCUW Six (6)

CHIOC Three (3)

CAPOC One (1)

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 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	March 1, 2019 - March 31, 2019

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; all Web activities are conducted through the 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

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: N/A; all Social Media activities are conducted through the Statewide 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	6-Riverside
Reporting Period	March 1, 2019 - March 31, 2019

Also indicate any leveraging of other resources conducted this month in regards to social media, etc.

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	133
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	58,666
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 Organizers: \$2,250
 Texting Management: \$1,250
 Field Coordinator: \$3,005
 Field Organizers: \$1,500
Canvassing Total: \$8,005

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

GSO organizers have canvassed throughout Riverside County to engage with the community and spread awareness about the Cal EITC. For example, GSO and partner Sigma Beta spoke with potential tax filers at the Hemet Parent Resource Center. This is a location where parents can come and receive

Target Area	6-Riverside
Reporting Period	March 1, 2019 - March 31, 2019

school supplies and other necessities for their children.

GSO had 133 1v1 interactions at 14 different canvassing events

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:

GSO staff and volunteers sent texts to 58,666 unique contacts in Riverside county, The texts sent were either testing out 4 different messages, or texting specifically around events in the community. We texted that there were free tax services in their area and that they can call to make an appointment.

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

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	6	1,021,575	0	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	6-Riverside
Reporting Period	March 1, 2019 - March 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Digital Advertising: \$16,698.75 GSO Staff and consulting: \$2,785 Media Total: \$19,483.75</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>Facebook Ads directly targeted at newly eligible population and general Cal EITC eligible population. Part of multi-layered strategy of conducting outreach in multiple ways including texts, digital ads, events, and collateral messaging.</p> <p>The Ads have generated 1,021,575 impressions in the month of March, generating 5,740 clicks to the website and sign-up page. Example of Digital Ad on next page:</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: N/A</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: N/A</p>	

Target Area	6-Riverside
Reporting Period	March 1, 2019 - March 31, 2019

Cal EITC 4 Me
Sponsored · 🌐

Stressed about filing your taxes? Attend a FREE tax prep event, learn how to claim the CA EITC, & earn up to \$6,000 cash back.

CALEITC4ME.ORG
FREE Tax Preparation
Find an event near you.

Learn More

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	157,000
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:

Multi-Lingual Collateral Printing: \$14,600.73
 Direct Mail: \$4,428.29
 Distribution: \$2,000 (GSO Salary)
Collateral Total: 21,029.02

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

Distributed 157,000 flyers to partners in Riverside County. All English/Spanish Front and back.

CalEITC4Me Eligibility Chart - 50,000
 Benefits Checklist - 5,000
 Resource Wheel - 100,000
 Older CA flyer: 2,000

Partners include:

Target Area	6-Riverside
Reporting Period	March 1, 2019 - March 31, 2019

Partners involved:
 TODEC
 All of Us Or Non
 CAP Riverside

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

All 10,000 Direct Mailers counted in February, some costs reported in March.

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

Group Events

Total Number of Events Held During the Reporting Period			6	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	92504	03/02/19	300	No
Community Gathering	92501	03/26/19	150	No
Free Tax Prep	92507	03/13/19	5	No
Free Tax Prep	92260	03/26/19	8	No
Free Tax Prep	92411	03/27/19	12	No
School	92376	03/06/19	100	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity expenditures during for this month and their costs:

Target Area	6-Riverside
Reporting Period	March 1, 2019 - March 31, 2019
1) List the various activity-expenditures charging for this month and their cost: No Event Expenses, Events managed through Sub-grantee funding	
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: N/A	
4) Any other additional information pertinent to work conducted, including leveraging of other resources: N/A	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<div style="border: 1px solid black; padding: 5px;"> Other 2 GSO Admin: \$1,000 </div>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<div style="border: 1px solid black; padding: 5px;"> Multiple events occurring on the same day, We overcame this challenge by having members from the Sacramento team help support events in Riverside County. </div>	
Narrative of Success Stories	
<div style="border: 1px solid black; padding: 5px;"> No Success Stories to Report at this time. </div>	

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	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	5,856

Narrative of Expenditures in EARS and Outreach Activities

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

- 2) Provide a narrative of education and outreach activities conducted during the month under web:
- 3) Any other additional information pertinent to work

Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019

Social Media

Number of Facebook Posts

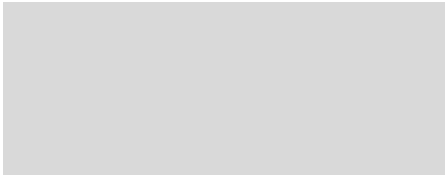
Number of Tweets

Exact Messaging of Most-Liked Facebook Post

Exact Messaging of Most-Favorited Twitter Post

The tax bus has arrived in west sacramento! Rain or shine, our free tax prep eam is here to help you save money on your taxes. Stop by to find out if you're eligible to receive #CalETIC and #ETIC! #freetaxprep #taxseason. (Post included a video)

State and federal Earned Income Tax Credits can put thousands of dollars in your pocket! Watch this video about a taxpayer who received



Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019

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Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	7765
Canvassing in Non-Targeted Zip Codes	10032
New Individuals Who Received Text Messages	
Phone Calls	9
Office Visits	656

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Program: \$14,693.88
 Wages: \$421.80
 Benefits: \$37.33
 Payroll Taxes: \$32.27
 Indirect: \$54.05
 Total: \$15,239.33

2) Provide broad overview of canvassing for targeted zip codes:
 See attached expanded narrative.

3) Provide a broad overview of canvassing for non-targeted zip codes:
 See attached expanded narrative.

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

Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019
<p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: NA</p> <p>5) Provide broad overview of Phone Calls conducted: See attached expanded narrative.</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: See attached expanded narrative.</p>	

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	1	8,752		
Paid Radio Ads	2	961,200		
Public Services Announcements (Radio)	1	732,500		
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements	2	4139461		
Internet/Website Ads	2	124,817	2	690
Social Media Promoted/Boosted Ads	6	116,530		

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
Professional Fees: \$48,455.92
Wages: \$1,193.18
Benefits: \$64.31
Payroll Taxes: \$95.66
Indirect: \$5,479.00
Total: \$55,288.07

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:
See attached PDFs

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	5-Sacramento	
Reporting Period	March 1, 2019 - March 31, 2019	
<p>Media link (internet, radio, TV, etc.) or other provide an internet link to the article or attach to email sent to CEO.</p> <p>See attached for report</p> <p>4) Indicate any leveraging of other resources conducted this month in regards to media: PSA interview with Entercom (732,500 gross impressions) Earned media 322,400 (see attached report)</p>		
Collateral Messaging		
	Category	Metrics
	Number of Flyers/Brochures Distributed	
	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>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 resources:</p>		

Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019

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Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
School	95824	03/01/19	50	No
Church	95824	03/03/19	400	No
School	95824	03/04/19	50	No
Community Gathering	95820	03/05/19	25	No
Educational Forum	95825	03/06/19	3	No
Community Gathering	95820	03/06/19	8	No
Community Gathering	95815	03/06/19	11	No
Community Gathering	95824	03/07/19	16	No
Community Gathering	95820	03/07/19	10	No
Community Gathering	95824	03/08/19	39	No
Community Gathering	95817	03/11/19	11	No
School	95821	03/11/19	13	No
Educational Forum	95833	03/12/19	5	No
School	95821	03/12/19	29	No
Community Gathering	95820	03/12/19	33	No
Community Gathering	95820	03/13/19	19	No
Community Gathering	95821	03/13/19	20	No
Educational Forum	95825	03/14/19	6	No

Target Area	5-Sacramento			
Reporting Period	March 1, 2019 - March 31, 2019			
Community Gathering	95821	03/14/19	32	No
Community Gathering	95610	03/15/19	22	No
Educational Forum	95838	03/15/19	17	No
Community Gathering	95824	03/16/19	45	No
School	95608	03/16/19	25	No
Educational Forum	95838	03/16/19	9	No
Resource Fair	95821	03/19/19	390	No
Educational Forum	95825	03/20/19	3	No
School	95824	03/21/19	75	No
Resource Fair	95834	03/22/19	60	No
Educational Forum	95825	03/22/19	4	No
Free Tax Prep	95825	03/23/19	9	No
Church	95822	03/24/19	230	No
Community Gathering	95820	03/25/19	13	No
Community Gathering	95820	03/26/19	20	No
School	95825	03/28/19	18	No
Library	95821	03/28/19	10	No
Community Gathering	95821	03/28/19	25	No
Community Gathering	95838	03/28/19	5	No
Educational Forum	95811	03/29/19	5	No
Community Gathering	95820	03/29/19	26	No
Free Tax Prep	95825	03/30/19	5	No
Church	95828	03/31/19	350	No

Narrative of Expenditures in EARS and Outreach Activities

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

Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Program: \$8,296.90 Wages: \$421.80 Benefits: \$37.33 Payroll Taxes: \$32.27 Indirect: \$5,405.40 Total: \$14,193.70</p> <p>2) Provide a brief overview of events conducted during the reporting period: See attached expanded narrative.</p> <p>3) If members of the press attended an event, indicate which press outlets: See attached expanded narrative.</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: See attached expanded narrative.</p>	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	

Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019

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Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

Type Text Here

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>

Target Area	5-Sacramento
Reporting Period	March 1, 2019 - March 31, 2019

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	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	80

Narrative of Expenditures in EARS and Outreach Activities

Social Media			
Number of Facebook Posts	15	Number of Tweets	17
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	

#TaxDay is quickly approaching. Make sure you file for #free with us! <https://earnitkeepitsaveit.org/find-tax-help-now/> Vroom Vroom!

#VITA #california #IRS #TaxCredits #Refund #Finance



Target Area	4-San Francisco/San Mateo
Reporting Period	March 1, 2019 - March 31, 2019

Number of Other Posts (Instagram, etc.)

Vroom Vroom!
3

		Interactions
		0
Canvassing in Non-Targeted Zip Codes		0
		6571
		160
		0

Target Area	4-San Francisco/San Mateo
Reporting Period	March 1, 2019 - March 31, 2019

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

Costs for canvassing continued to be for our staff working on text and phone canvassing projects. The total costs were \$778.96 including \$728 in staff salaries and rent and \$50.96 in administrative costs.

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:

In partnership with GSO, peer-to-peer text messaging continued in earnest in March with over 50,000 texts sent in total. In their partnership with UC Berkeley, GSO completed their message testing to help determine what messaging is most effective in getting potential filers to file.

5) Provide broad overview of Phone Calls conducted:

We partnered with 211 Bay Area to assist with referrals to tax sites and to answer questions related to the EITC. We had 40 calls in San Mateo and 120 in San Francisco (that were not related to calls for general 211 clients) who were interested in making appointments.

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

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	14	310,298	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	21	528,730	11	131,600
Public Services Announcements (T.V.)	0	0	2	10,940
Billboards	12	1,277,965	0	0
Transit Advertisements	13	763,873	0	0
Internet/Website Ads	2	227,975	1	65,093
Social Media Promoted/Boosted Ads	11	440,106	1	23,750

Narrative of Expenditures in EARS and Outreach Activities

Target Area	4-San Francisco/San Mateo
Reporting Period	March 1, 2019 - March 31, 2019

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

Costs continue to include staff salaries and rent for staff working on media buys and planning as well as for ad space. We paid several large invoices in March for outdoor as well as online and television advertising. We also ramped up our social media buys. The total media costs for March were \$27,483.37 including:

- \$2,033.85 in staff salaries and rent
- \$97.42 in signage costs
- \$7,706.40 in online and television ad space
- \$14,455 in outdoor ads
- \$1,392.72 in Twitter and Facebook advertising
- \$1,797.98 in administrative fees

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:

This month, UWBA ran advertising on NBC Bay Area, Univision, Telemundo, and KTSF (our local Chinese language station). We also ran online ads on the websites of those same affiliates. We began our English language radio, as well as Facebook and Twitter advertising, and continued our billboards and other outdoor advertising. GSO also ran social media ads in our targeted regions on Facebook and Twitter, which are included in the impressions above. In terms of Chinese language impressions, we had 336,408 via television, 7,580 via online/web, and 12,330 via Facebook.

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:

UWBA staff person Ana Lagunas was a guest on Univision. The segment ran twice and received views throughout the region.

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

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	500
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	4-San Francisco/San Mateo
Reporting Period	March 1, 2019 - March 31, 2019

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

We incurred small postage costs mailing material to our partners. The total cost was \$23.22 including \$21.70 in postage and \$1.52 in administrative costs.

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

Our partners continued to distribute materials throughout the community.

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:

As previously mentioned in our other reports, we have distributed nearly 80,000 postcards as well as thousands of Cal EITC brochures to partners throughout our region. We continue to see materials posted at stores, community centers, schools, and more! This is the direct result of our distribution strategy earlier in the season.

Group Events

Total Number of Events Held During the Reporting Period			1	
Location	Zip Code	Date	Attendance	Press at Event?
Community Gathering	94108	03/15/19	40	Yes

Narrative of Expenditures in EARS and Outreach Activities

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

Target Area	4-San Francisco/San Mateo
Reporting Period	March 1, 2019 - March 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>Costs for group events continue to be primarily for staff costs for planning and attending events. The costs for March were \$925.52 including \$864.97 for staff salaries and rent and \$60.55 in administrative costs.</p> <p>2) Provide a brief overview of events conducted during the reporting period:</p> <p>We attended an event with Assemblymember Phil Ting at our partner site, Chinese Newcomers. The event was designed to promote free tax prep and the Cal EITC specifically to the Chinese community.</p> <p>3) If members of the press attended an event, indicate which press outlets:</p> <p>Yes, we had Chinese media at the event. A link to the article can be found here: https://www.worldjournal.com/6199864/article-%E5%85%8D%E7%B9%B3%E7%A8%85%E4%B9%9F%E8%A6%81%E5%A0%B1%E7%A8%85-%E6%9C%89%E6%A9%9F%E6%9C%83%E6%8B%BF%E9%8C%A2/ https://www.singtaousa.com/%E7%A4%BE%E5%8D%80_%E5%83%91%E7%A4%BE/2254061-%E5%B7%9E%E8%AD%B0% https://www.worldjournal.com/6167674/article-%e5%8a%a9%e9%87%8d%e8%bf%94%e7%a4%be%e6%9c%83%e8%ad%b0%e5</p> <p>4) Any other additional information pertinent to work conducted, including leveraging of other resources: N/a</p>	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
Type Text here	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	

Target Area	4-San Francisco/San Mateo
Reporting Period	March 1, 2019 - March 31, 2019

We had some events and outreach community gatherings get cancelled this year due to circumstances beyond our control (for example, a partner moved a large number of their staff). It always makes it hard to reschedule events that are supposed to happen in March.

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 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	March 1, 2019 - March 31, 2019

Web

Category	Metrics
EITC Website Hits	172

Narrative of Expenditures in EARS and Outreach Activities

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

The costs for this month were for staff working on the web. Along with general on-going updates, we also refreshed the front page to make it easier for clients to find a tax site. The total costs were \$1,458.17 including:

- \$1,362.77 for staff salaries and rent
- \$95.40 in administrative costs

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

This month, we refreshed our primary homepage (<http://uwba.org>) to make it easier to find a tax site. We believe this likely helped folks find a tax site while also reducing our bounce rate. The reason why this is significant is because we had 172 visitors to our Cal EITC specific page but 9,281 visitors to our website overall. The most popular page by far, however, is and remains the tax site finder.

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

All of our collateral and outdoor, as well as media advertising, directs to our website.

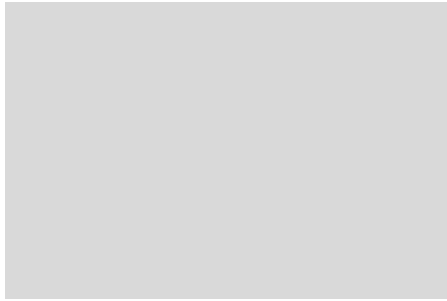
Social Media

Number of Facebook Posts	20	Number of Tweets	18
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	

Target Area	3-Alameda/Santa Clara
Reporting Period	March 1, 2019 - March 31, 2019

#TaxDay is quickly approaching. Make sure you file Vroom Vroom!
for #free with us! <https://earnitkeepitsaveit.org/find-tax-help-now/>

#VITA #california #IRS #TaxCredits #Refund #Finance



Target Area	3-Alameda/Santa Clara
Reporting Period	March 1, 2019 - March 31, 2019
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	24262
Phone Calls	541
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 continued to work with 211, our texting subcontractors and other partners on canvassing and outreach. The total costs were \$1,677.76 including:

- \$1568.00 in staff costs and rent
- \$109.76 in administrative costs

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

During the month of March, Sacred Heart continued to do their canvassing efforts. Each block canvassed contained roughly between 150 to 300 houses per block. Each block was made up of a mixture of traditional houses, duplexes, and apartments. They knocked on doors in the allowed block area and engaged with as many people as possible, often having one-on-one engagement with people in the community. They provided people with brochures while we explained to them what the EITC credit was, how it functioned, and how they could benefit from this credit if they were to apply and qualify. In addition, we provided the community with a working phone number that they could send a text message to and get screened for the EITC credit to determine if they qualified. From the canvassing, we learned that many families were not aware of the benefits provided from this credit and many individuals expressed interest in learning more about how they can qualify for the credit.

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:

Through GSO, peer-to-peer text messaging continued in earnest in March with over 50,000 texts sent in total. In partnership with UC Berkeley, GSO completed our message testing to help determine what messaging is most effective in getting potential filers to file.

5) Provide broad overview of Phone Calls conducted: Phone call data continues to be from our 211 Bay Area partners (Santa Clara County) and Eden Information and Referral (Alameda County). These include calls and referrals to free tax preparation and EITC. Eden I & R added another question to their standard intake in March, asking clients if they had already filed a tax return. If not, the phone screener gave referrals to a free tax site in their area and explained the Cal EITC if the client was eligible based on income.

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

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads	0	0	0	0
Paid Radio Ads	31	670,128	0	0
Public Services Announcements (Radio)	0	0	0	0
Paid Television Ads	46	1,141,858	24	131,600
Public Services Announcements (T.V.)	0	0	2	23,626

Target Area	3-Alameda/Santa Clara			
Reporting Period	March 1, 2019 - March 31, 2019			
Billboards	25	2,000,000	0	0
Transit Advertisements	28	1,649,679	0	0
Internet/Website Ads	2	492,341	1	16,293
Social Media Promoted/Boosted Ads	11	950,464	4	26,505

Narrative of Expenditures in EARS and Outreach Activities

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

Along with staff salaries and rent, we also paid invoices for our outdoor advertising as well as for Lincoln Broadcasting for television and online advertising. We also continued to buy ads on Facebook and Twitter. The total costs for March for Media were \$34,420.33 including:

- \$4,380.59 in staff salaries and rent
- \$209.82 in printed signage
- \$16,598.40 in television and online advertising
- \$7,980 in outdoor advertising
- \$2,305.32 in Facebook advertising
- \$694.40 in Twitter advertising
- \$2,251.80 in administrative 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:

This month, UWBA ran advertising on NBC Bay Area, Univision, Telemundo, and KTSF (our local Chinese language station). We also ran online ads on the websites of those same affiliates. We began our English language radio, as well as Facebook and Twitter advertising, and continued our billboards and other outdoor advertising. GSO also ran social media ads in our targeted regions on Facebook and Twitter, which are included in the impressions above. In addition to the numbers submitted above, we also received 723,120 Chinese television impressions, 16,293 online impressions, and 26,505 social media 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:

UWBA staff person Ana Lagunas was a guest on Univision. The segment ran twice and received views throughout the region.

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

Collateral Messaging

Category	Metrics
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Target Area	3-Alameda/Santa Clara
Reporting Period	March 1, 2019 - March 31, 2019
Number of Flyers/Brochures Distributed	1,365
Number of New Individuals who Received Direct Mailers	3,000

Narrative of Expenditures in EARS and Outreach Activities

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

The costs for collateral messaging were for postage related to mailing materials to our partners. The total post cost was \$50.00 including \$46.73 for mailing and \$3.27 for administrative costs.

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

1,365 flyers and postcards were distributed by UWBA partners, including 100 by EBALDC and 1,200 by our partners in Santa Clara County including CalWORKS Social Service Agency.

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

Our partner in Santa Clara County, Amigos de Guadalupe Community Services, sent 2,000 postcards to their clients.

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

At this point in the season, we have given out nearly 80,000 postcards throughout our region, with a majority in Alameda and Santa Clara counties, along with thousands of Cal EITC brochures from the FTB. These postcards and flyers are at many social service agencies, schools, art centers, pre-schools, small stores, and more!

Group Events

Total Number of Events Held During the Reporting Period			12	
Location	Zip Code	Date	Attendance	Press at Event?
Free Tax Prep	95054	03/01/19	30	No
Educational Forum	95112	03/06/19	45	No
Free Tax Prep	95110	03/24/19	60	No
Community Gathering	95110	03/02/19	12	No
Community Gathering	95110	03/09/19	12	No
Community Gathering	95110	03/16/19	12	No
Community Gathering	94601	03/09/19	27	no
Community Gathering	64601	03/13/19	14	no

Target Area	3-Alameda/Santa Clara			
Reporting Period	March 1, 2019 - March 31, 2019			
Community Gathering	94601	03/20/19	14	no
Resource Fair	94618	3/7/2019	172	no
Resource Fair	94566	3/20/2019	296	no
Resource Fair	94608	3/21/2019	345	no

Narrative of Expenditures in EARS and Outreach Activities

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

We continued to incur costs for planning and staffing group events. The total cost was \$1,659.27 including:

- \$1,550.72 in salaries and rent
- \$108.55 in administrative costs

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

We continue to rely on partners and subcontractors so that we can spread our reach throughout a large service area. Eden I & R, Sacred Heart, EBALDC, and United Way Bay Area each attended or hosted events including resource fairs and community fairs, educational forums, and free tax prep events where potential clients may be. While these are time consuming, they do continue to be helpful in getting the word out to community members and organizations.

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:

We also worked with GSO to try and host an event with the South Bay Labor Council in San Jose. This event ultimately did not happen due to timing, but we feel it did give their membership an opportunity to hear more about accessing free tax prep and the EITC.

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

Type Text here

Target Area	3-Alameda/Santa Clara
Reporting Period	March 1, 2019 - March 31, 2019
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<p>The primary challenge cited by our partners, particularly those doing events and canvassing, was the rain. We had many rainy days in March which impacted our ability to get volunteers and staff out to events and to canvassing, as events were sometimes cancelled or rescheduled.</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 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	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	3,851

Narrative of Expenditures in EARS and Outreach Activities

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

In March, our 2-1-1 San Diego tax information web page continued to highlight CalEITC eligibility for expanded age groups of young adults ages 18-24 and seniors ages 65 and above. Information regarding free VITA appointments, income guidelines and the tax credits available remained on our web page.

Our subcontractors/partners continue to be highlighted towards the bottom of the page. There were 3,380 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: 2 hours x \$41.67 per hour = \$83.34

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

In addition to highlighting EITC and CalEITC eligibility for the expanded age groups, the 2-1-1 tax information page encourages Californians whose income does not require them to file taxes, workers with income up to the required threshold, and those who have never claimed the credit, to claim CalEITC and EITC. 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	March 1, 2019 - March 31, 2019

Social Media

Number of Facebook Posts	9	Number of Tweets	13
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
We are proud to partner with Cal EITC 4 Me to educate San Diegans on the #CalEITC. For more information, visit: https://211sandiego.org/.../financial-assistance-tax-informa.../ or call 2-1-1!		We are proud to partner with @CalEITC4Me to educate San Diegans on #CalEITC. For more information, visit: https://211sandiego.org/.../financial-assistance-tax-informa.../ or call 2-1-1!	
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

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

In March, there were a total of 9 Facebook posts and 13 Twitter posts published. There were a total of 2,394 Facebook reaches and 10,379 Twitter impressions.

Social Media costs: 22 posts = 11.00 hours x \$41.67 per hour = \$458.37

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

In March, we raised awareness and use of federal and state EITC through social media by highlighting CalEITC and EITC eligibility for workers with incomes up to the required threshold, and Californians whose income does not require them to file taxes, and encouraging those who have not filed to do so as the tax filing deadline approaches.

We tagged CalEITC4ME and shared one of their Facebook posts, as well as International Rescue Committee's post. We also tagged our subcontractors on our last post in March to highlight our combined outreach and education efforts.

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:

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	5,356
Canvassing in Non-Targeted Zip Codes	
New Individuals Who Received Text Messages	6,000

Target Area	2-San Diego	
Reporting Period	March 1, 2019 - March 31, 2019	
	Phone Calls	33,559
	Office Visits	

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 conducted 33,559 one-to-one phone interactions for CalEITC, EITC, and VITA through inbound and outbound activities.

2-1-1 San Diego phone calls: 5,518 inbound calls = 551.80 hours x \$24.30 per hour = \$13,408.74
28,041 outbound calls = 4,673.50 hours x \$24.30 per hour = \$113,566.05
**line item budget limit reached; only billing \$110,193.86 for outbound calls*

2-1-1 San Diego contact center management:

Service Delivery Manager: 40 hours x \$41.28/hr = \$1,651.20

Program Assistants: 3.34 hours x \$25.50/hr = \$85.17

Director of Enrollment & Navigation Services: 3 hours x \$53.54/hr = \$160.62

**line item budget limit reached; only billing \$140.08 for Dir of E&N Services*

Senior Data Analyst: 4 hours x \$54.60/hr = \$218.40

2-1-1 San Diego training: Community Connectors: 28 hours x \$24.30/hr = \$680.40

Child Development Associates: \$1,170.00

Dreams For Change: \$5,584.00

ElderHelp: \$225.00

International Rescue Committee: \$5,474.74

YMCA Childcare Resource Service: \$84.00

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

ElderHelp conducted 40 door-to-door activities providing CalEITC outreach and education, and YMCA conducted 3,984. IRC also conducted door-to-door activities, and CDA conducted 300 interactions in person and over the phone.

Dreams for Change conducted 3,581 door-to-door outreach activities in the following zip codes: 91910, 91911, 92021, 92025, 92101, 92105, and 92115.

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

Target Area	2-San Diego
Reporting Period	March 1, 2019 - March 31, 2019

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

Text messaging took place by the Riverstar scheduling system on March 14th and 20th. A total of 6,000 text messages were sent to previous VITA clients, in batches of 3,000.

5) Provide broad overview of Phone Calls conducted:

Of the 33,559 one-to-one phone interactions conducted by 2-1-1 San Diego, 5,356 of those were in the targeted zip codes of 91910, 91911, 92101, 92105, and 92115. The remaining 28,203 were in non-targeted zip codes.

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:

Although we have completed outbound activities, we will continue to answer calls resulting from clients who have heard our message, and are calling for more information.

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	613	146,047		

Narrative of Expenditures in EARS and Outreach Activities

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

Our Facebook ad will continue to run past the end of tax season, ending in May. The Facebook ad is expected to reach approximately 680,000 people based on audience targeting, and continues to display the following message:

"Tax Season is Here! Don't Miss Out on Available Tax Credits like CalEITC! Call 2-1-1!"

The Facebook ad will be updated on 4/16/19.

Target Area	2-San Diego
Reporting Period	March 1, 2019 - March 31, 2019

Facebook Ads (vendor cost): \$1,282.41

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:

Facebook ads reached 146,047 people in March, and had 613 post engagements. 57% of those reached were men, and the remaining 43% were women.

Expanded target populations reach:

21,435 were men ages 18-24 and 20,995 were women ages 18-24.

2,016 were men ages 65 and above and 2,783 were women ages 65 and above.

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:

As billboards promoting CalEITC, EITC, and VITA continued prompt clients to dial 2-1-1, and an increase in our social media platforms and Facebook ads, we did not have scheduled media activities in March 2019. We have continued planning media participation and activities as we near the end of tax season this April.

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

Reporting for Billboard Ad Campaign will be available in April 2019.

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	6,683
Number of New Individuals who Received Direct Mailers	922

Narrative of Expenditures in EARS and Outreach Activities

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

Child Development Associates: \$457.02

Dreams For Change: \$3,200.00

ElderHelp: \$0.00

International Rescue Committee: \$406.03

YMCA Childcare Resource Service: \$1,856.00

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

2-1-1 provided flyers and posters to all subcontractors who continue to distribute them during their outreach efforts.

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

Target Area	2-San Diego
Reporting Period	March 1, 2019 - March 31, 2019

2-1-1 distributed 922 combined e-mails and direct mailers with CalEITC, EITC, and VITA flyers to clients who completed a CalFresh application with the Enrollment Center during March. Although we've exceeded our goal of 1,500, we will continue to send e-mails and direct mailers to clients who complete a CalFresh application with our Enrollment Center until 4/9/19.

2-1-1 also distributed an additional 6,683 e-mails with CalEITC, EITC, and VITA flyers to clients who completed a CalFresh application with the Enrollment in 2018.

In March, YMCA distributed 732 flyers and mailed 4,389. Dreams for Change distributed 1,563 flyers at six events, and IRC mailed 1,500 postcards with CalEITC, EITC, and VITA information directing callers to dial 2-1-1.

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

CDA conducted 1 more Facebook and e-mail blast campaign for Tax Day 3/2/19.

Group Events

Total Number of Events Held During the Reporting Period				
Location	Zip Code	Date	Attendance	Press at Event?
Church	92104	03/12/19	20	No
Library	92101	03/19/19	200	Yes
Community Gathering	92101	03/20/19	3	No
Church	91911	03/21/19	15	No
Library	92101	03/28/19	25	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activities, expenditures, charging for this month and their cost:

Target Area	2-San Diego
Reporting Period	March 1, 2019 - March 31, 2019
<p>1) List the various activity-expenditures charging for this month and their cost:</p> <p>2-1-1 San Diego attended a total of 5 outreach events during the month of February, reaching 263 individuals; all of which took place in targeted zip codes.</p> <p>2-1-1 San Diego outreach presentations at meetings: Presentation staff: 2 presentations = 0.33 hours x \$22.95 per hour = \$7.57</p> <p>2-1-1 San Diego Community Booths: Outreach Staff: 17.5 hours x \$24.30 per hour = \$425.25</p> <p>Child Development Associates: \$380.85 Dreams for Change: \$2,997.00 YMCA Childcare Resource Service: \$728.00</p> <p>2) Provide a brief overview of events conducted during the reporting period:</p> <p>2-1-1 San Diego attended the following events and provided CalEITC brochures, outreach & education to participants: 3/12/2019 - Street Boutique with Think Dignity (20 attendees) 3/19/2019 - 2nd Annual Mental Health Resource Fair (200 attendees) 3/20/2019 - Outreach/Partnership Meeting (3 attendees) 3/21/2019 - Fresh Start Showers Program Outreach (15 attendees) 3/28/2019 - Monthly CalFresh Outreach (25 attendees)</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:</p> <p>2-1-1 also provided partner education to 2 partner meetings taking place at 2-1-1's Connections Center, reaching 105 community partners:</p> <p>3/6/2019 - SD County - SUD Skill Building Workshop (45 attendees) 3/27/2019 - YMCA- Association Board Meeting (60 attendees)</p> <p>YMCA also attended outreach events where they promoted CalEITC outreach and education, reaching 185 individuals. Dreams for Change attended two outreach events, reaching 2730 individuals, and CDA attended Tax Day Event.</p>	
Other	
Category	Actual (#)
Recording Played to Callers	25,243
Narrative of Expenditures in EARS and Outreach Activities	

Target Area	2-San Diego
Reporting Period	March 1, 2019 - March 31, 2019

The following automated recording remained on the IVR for incoming calls throughout the Month of March:
“Did you know that households with less than \$55,000 annual income may qualify for free tax preparation assistance, and could also collect up to thousands of dollars of Earned Income Tax Credits? Be sure to ask your representative for more information or visit our website, 211sandiego.org”

A total of 78,213 callers have heard this message during this contract term, exceeding our target of 50,000. Despite exceeding this goal, the message will remain in our IVR until at least the end of tax season.

Message Recording billable costs: \$0 this month

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

Target Area	2-San Diego
Reporting Period	March 1, 2019 - March 31, 2019
<p>Date of Success Story:</p> <p>Name of Person from Success Story:</p> <p>Zip-Code Where Person Lives:</p> <p>VITA Site where person got taxes done (if applicable):</p> <p>Narrative:</p>	

2018 Cal EITC Education and Outreach Grant Monthly Progress Report

Grantee Organization Name	Koreatown Youth and Community Center
Grantee Representative	Gabrielle Maestas
Telephone Number	(213) 365-7400
Email Address	gmaestas@kyccla.org
Contract Number	18T-8003
Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

Web	
Category	Metrics
EITC Website Hits	12,751

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month: \$18,641.40 (\$14,210 for posting and data collection; \$4,431.40 for administering web activities).

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. A total **7,228** site visits to partner agency webpages detailing Free tax services and information about EITC.

The Free Tax Prep LA website (www.freetaxprepla.com) was listed in all outreach material (bus benches, transportation shelters, wall ads, banners, flyers, press release/press event, and on partner website). Majority of visits were to the www.freetaxprepla.com website (**4,758** visits by paid targeted web ads vs **765** organic site visits) in March. The site includes updated tax season locations and times, links to online booking, and contact information for over **30** VITA locations. Total site visits exceed **12,751**.

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 partners include the Mayor of Los Angeles, Eric Garcetti, created a webpage (<https://www.lamayor.org/FreeTaxPrep>) with information about EITC, CalEITC, and Free Tax Prep LA. It includes several videos in English and Spanish. The videos also connect families to local LAUSD schools where special tax preparation days have been scheduled. The page links to www.freetaxprepla.com.

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019
<p>Also, City of Los Angeles Controller Ron Galperin, 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.</p>	

Social Media

Number of Facebook Posts	281	Number of Tweets	303
Exact Messaging of Most-Liked Facebook Post		Exact Messaging of Most-Favorited Twitter Post	
<p>VITA volunteers aren't just here to help you file your taxes for free. They're here to explain your tax return, provide financial education, and help you start this next year on the right financial foot!</p> <p>To get help from a VITA volunteer today, visit freetaxprepla.com. (96 likes)</p>		<p>Big news for young adults 18 to 24! You're eligible for the #CalEITC for the first time this year! Use this calculator tool from @CalEITC4ME to find how much \$\$\$ you could get back from filing this #taxseason. caleitc4me.org/young-californ...pic.twitter.com/EjZCyAnf2D</p>	
Number of Other Posts (Instagram, etc.)	40	Exact Messaging of Most-Liked "Other" Post	
		<p>Don't Forget... free tax services at Bresee! Book your appointment online at breseefsc.youcanbook.me. Link in bio #FreeTaxPrepLA #ItsYourMoney</p>	

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month: \$18,641.40 (\$14,210 for posting and data collection; \$4,431.40 for administering social media activity).

2) Provide a narrative of education and outreach activities conducted during the month under social media: Social media calendars were sent to subagencies including a link to Dropbox photos to use in social media posts. Social media messaging this month was focused on qualifications for eligibility regarding the Federal and State EITC as well as EITC facts and figures. A total of **624** social media posts went out this month.

Social media calendars were developed and shared with subagencies and partners. Social media calendars were also translated into English, Chinese, and Spanish. The January social media messages focused on information on the expanded EITC, VITA success stories, and VITA services. Additionally, an abbreviated social media calendar was developed to share with partners, like elected officials and government agencies. Twitter had **44,800** impressions and Facebook had **20,062** organic impressions.

Subagencies collect photos and video testimonies of their clients or feature Free Tax Prep LA or Cal EITC logo. We collect these photos and upload them to the shared Dropbox so subagencies can use for their own

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

agency social media messages. This helps the outreach on social media be more cohesive and relateable to imagery.

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, United Way of Greater Los Angeles, and First 5 Los Angeles. Messages and graphics are also shared with fellow grantee Youth Policy Institute and includes content created by CalEITC4me and United Way of California.

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	1,309
Canvassing in Non-Targeted Zip Codes	1,545
New Individuals Who Received Text Messages	1,778
Phone Calls	3,096
Office Visits	3,161

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$18,641.40 (\$14,210 for canvassing; \$4,431.40 for administering canvassing activity).

2) Provide broad overview of canvassing for targeted zip codes: Subagencies sent reminder texts to clients that the EITC was available to those making less than \$55,000 and that free tax services were available at their center at information at www.freetaxprepla.com. Other agencies focused on alerting their clients about Mega Tax Day events. Over **1,300** text messages were sent to individuals living in targeted zip codes. Messages were sent in English and Spanish.

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

Subagencies covered low-income housing buildings that are operated by, or already served by the agency. Subagencies sent reminder texts to clients that the EITC was available to those making less than \$55,000 and that free tax services were available at their center at information at www.freetaxprepla.com. Other agencies focused on alerting their clients about Mega Tax Day events. There was a total of **1,545**

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019
<p>agencies focused on alerting their clients about Mega Tax Day events. There was a total of 1,549 interactions in non-targeted zip code areas.</p> <p>4) Provide broad overview of text messages sent out, including the total number of text messages sent: We utilized the service "Simple Texting" to send out customized messages for each of the Family Source Centers. We coordinated a message specific to their location and sent out over 1,778 texts to the numbers in they provided. We were able to send messages out in English and in Spanish. Messages were sent to clients enrolled at the subagency and may have already used a service from them before. All text recipients provided consent last year to receive text messages.</p> <p>5) Provide broad overview of Phone Calls conducted: Customers listen to a recorded message about services, EITC, and how to qualify. There are over 3,096 callers in English, Korean, and Spanish that listen to the recording within the month of March.</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: N/A</p>	

Media

Category	English Ads Run (#)	English Impressions	Spanish Ads Run (#)	Spanish Impressions
Printed Ads				
Paid Radio Ads	1	40,000		
Public Services Announcements (Radio)				
Paid Television Ads				
Public Services Announcements (T.V.)				
Billboards				
Transit Advertisements				
Internet/Website Ads	1,844	256,247	1,844	256,247
Social Media Promoted/Boosted Ads				

Narrative of Expenditures in EARS and Outreach Activities

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

1) List the various activity-expenditures charging for this month and their cost: \$14,431.42 (\$10,000 for web ads; \$4,431.42 for administering ads activity).

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:

Web Ads

Targeted ads to specific household compositions (young adults, latino, specific targeted zip codes). Total ad sites: **3,688** (1/2 in English & 1/2 Spanish or 1,844 per language) with 512,495 impressions according to Mogo Interactive. The web ads generated **4,658** clicks to the www.freetaxprepla.com website.

Transportation Ads

100,000 impressions/4 weeks = 25,000 times the number of ads (220) or 5,500,000 impressions in the first month or 25,000 each month

Wall Ads

Wall ads (**92**) also went up. The ads are in low-income zip codes at convenient store, gas stations, and check cashing stores with street and foot traffic.

2,000 impressions/4 weeks = 500 times the number of ads (92) or 46,000 impressions each month.

3) Provide information on whether or not any earned media obtained during the month: N/A

4) Indicate any leveraging of other resources conducted this month in regards to media: United Way of Greater Los Angeles aired a mid-tax season reminder on the Earned Income Tax Credit on KPCC 89.3 (NPR affiliate) on March 6th. There are an average **40,000** listeners and web impressions per day. Listed above as "Radio Ad" although it was unpaid.

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	7,496
Number of Emails Sent	4,921
Number of New Individuals who Received Direct Mailers	514

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$18,641.40 (\$14,210 for collateral messaging; \$4,431.40 for administering collateral messagings activity).

2) Provide a broad overview of flyer/brochure and poster distribution: Over **7,496** pieces of collateral were disseminated at subagencies (at the center or at community events). All new clients undergo a screening process and receive information about free tax services and the available tax credits (federal

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019
<p>and state EITC). More so, clients receive the information at agency workshops, trainings, enrollments, and giveaways where they may benefit from receiving the information again.</p> <p>3) Provide a listing and narrative of direct mailers that went out: Direct mailers go out to clients to remind them to make an appointment at a VITA tax site. The mailers reached 514 individuals.</p> <p>4) Any other additional information pertinent to work conducted including leveraging of other resources: N/A</p>	

Group Events

Total Number of Events Held During the Reporting Period			67	
Location	Zip Code	Date	Attendance	Press at Event?
Resource Fair	90813	03/30/19	350	No
Community Gathering	90061	03/16/19	200	No
Resource Fair	90650	03/13/19	300	No
Educational Forum	90021	03/22/19	17	No
Educational Forum	90032	03/01/19	48	No
Free Tax Prep	90032	03/02/19	50	No
Free Tax Prep	90032	03/16/19	60	No
School	90032	03/21/19	350	No
Resource Fair	90033	03/28/19	120	No
Community Gathering	90032	03/30/19	120	No
Community Gathering	90044	03/29/19	20	No
Health Care Clinic	90057	03/04/19	50	No
School	90005	03/05/19	40	No
Resource Fair	90017	03/20/19	50	No
Health Care Clinic	90006	03/25/19	55	No
Educational Forum	91770	03/13/19	17	No
Educational Forum	90041	03/13/19	20	No
Health Care Clinic	90012	03/22/19	300	No
Community Gathering	91776	03/26/19	3	No
Community Gathering	90057	03/22/19	12	No

Target Area	1-Los Angeles			
Reporting Period	March 1, 2019 - March 31, 2019			
Free Tax Prep	90033	03/09/19	54	No
School	90033	03/21/19	37	No
Free Tax Prep	90033	03/23/19	67	No
School	91340	03/07/19	30	No
Community Gathering	1/19/2150	03/21/19	10	No
School	91331	03/21/19	35	No
Resource Fair	91340	03/20/19	45	No
School	91340	03/13/19	30	No
School	91340	03/14/19	25	No
School	91340	03/21/19	30	No
School	90043	03/05/19	60	No
Community Gathering	90047	03/14/19	20	No
Free Tax Prep	91103	03/01/19	12	No
Free Tax Prep	90016	03/07/19	16	No
Free Tax Prep	90291	03/09/19	10	No
Free Tax Prep	90025	03/13/19	10	No
Free Tax Prep	90034	03/19/19	15	No
Free Tax Prep	90291	03/23/19	13	No
Free Tax Prep	90025	03/27/19	17	No
Free Tax Prep	90291	03/30/19	7	No
School	91335	03/12/19	25	No
School	91304	03/21/19	250	No
Resource Fair	91406	03/22/19	100	No
School	91306	03/29/19	100	No
Community Gathering	91401	03/15/19	30	No
Community Gathering	914005	03/19/19	175	No
School	91402	03/23/19	100	No
Free Tax Prep	90731	03/05/19	22	No
School	90744	03/06/19	15	No
Resource Fair	90501	03/06/19	10	No

Target Area	1-Los Angeles			
Reporting Period	March 1, 2019 - March 31, 2019			
Free Tax Prep	90731	03/07/19	21	No
Free Tax Prep	90731	03/12/19	14	No
Free Tax Prep	90744	03/14/19	23	No
Free Tax Prep	90731	03/19/19	27	No
Free Tax Prep	90710	03/14/19	18	No
Free Tax Prep	90731	03/26/19	22	No
Free Tax Prep	90731	03/28/19	20	No
Resource Fair	90002	03/30/19	210	No
Resource Fair	90059	03/23/19	112	No
Resource Fair	90006	03/16/19	200	No
School	90005	03/04/19	50	No
Resource Fair	90004	03/02/19	140	No
School	90004	03/07/19	35	No
School	9004	03/15/19	40	No
School	90007	03/22/19	75	No
School	90005	03/14/19	100	No
Library	90006	03/06/19	22	No

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost: \$18,641.40 (\$14,210 for outreach events; \$4,431.40 for administering outreach event activities).

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

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019
<p>2) Provide a brief overview of events conducted during the reporting period:</p> <p>For the month of March subagencies reported outreach events targeted to low-income residents of Los Angeles, such as parent night at schools, college resource events, food assistance, bus token and diaper giveaway events, and service provider presentations. More so, presentations on free tax services and Federal and State EITC were included as part of financial education, small business classes, parenting, computer, English as a second language, etc. type of courses. At meetings, both families, partner agencies, and staff learned about the many services available to them, including free tax services. All presentations are in English, Spanish, Chinese, and/or Korean. In total, 4,681 individuals were reached by the group events.</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>	
Other	
Category	Actual (#)
Narrative of Expenditures in EARS and Outreach Activities	
<div style="border: 1px solid black; padding: 5px; min-height: 40px;">Type Text here</div>	
Challenges and Success Stories	
Challenge(s) Faced During the Reporting Period	
<div style="border: 1px solid black; padding: 5px; min-height: 40px;">Type Text Here</div>	
Narrative of Success Stories	
<div style="border: 1px solid black; padding: 5px;"> <p>Success Story #1 Date of Success Story: March 2019 Name of Person from Success Story: Anonymous Zip-Code Where Person Lives: 90011</p> </div>	

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019
<p>VITA Site where person got taxes done (if applicable): All People's Community Center</p> <p>Narrative: VITA Coordinator Jesse De La Cruz assisted a client whom thought he was going to owe money for three years. After preparing the 3 tax returns, Jesse informed the client that he was eligible to receive a refund for over \$4,000. The client shared he was going to use \$2,500 to take his mother to eat out at a nice restaurant and go back to school. The client wants to complete his degree in nursing.</p> <p>Success Story #2</p> <p>Date of Success Story: March 2019</p> <p>Name of Person from Success Story: Maris Osomio</p> <p>Zip-Code Where Person Lives: 90057</p> <p>VITA Site where person got taxes done (if applicable): Barrio Action</p> <p>Narrative: Maris Osomio filed for a tax preparation amendment in the month of March through which she requested a replacement check for last year's tax return (about \$8,000) and received this year's return worth about \$5,000. With these combined income tax returns, she hopes to purchase her first car.</p> <p>Success Story #3</p> <p>Date of Success Story: March 2019</p> <p>Name of Person from Success Story: Viviana Perez and 2 children</p> <p>Zip-Code Where Person Lives: 90017</p> <p>VITA Site where person got taxes done (if applicable): LACCNP</p> <p>Narrative:</p> <p>Earlier this year Viviana was living in Las Vegas because the cost of living was much lower than Los Angeles. However she returned to Los Angeles to live with her sister and to while trying to find a job. As of February, Viviana has been working as a janitor. Now with her refund of \$4,289 (\$3,289 Federal and \$1,100 CA EITC), Viviana wants to find her own apartment and apply (Immigration Visa) for her mother from Honduras to come to the US. She was so excited that her life is coming together.</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-8002
Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

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; all Web activities are conducted through the 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

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	

Narrative of Expenditures in EARS and Outreach Activities

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

- 1) List the various activity-expenditures charging for this month and their cost:** N/A; all Social Media activities are conducted through the Statewide 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

Canvassing

Zip Code/Method of Outreach	Interactions
Canvassing in Targeted Zip Codes	560
Canvassing in Non-Targeted Zip Codes	0
New Individuals Who Received Text Messages	116,853
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:**

Peer-to-Peer Texting Costs:\$51.20
Texting Managment: \$3,750 (50 hours - \$75/H)
LA Program Director: \$5,000
Field Organizers: \$3,833

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

Organization Name	Date	Presenter	City	Audience (students, parents, members, etc)	Language(s)	# of Interactions
Burbank Middle School & Wilson High School	March 1, 2019	Francisco Valenzuela	Los Angeles	Parents, staff	English & Spanish	18
Burbank Middle School & Wilson High School	March 8, 2019	Francisco Valenzuela	Los Angeles	Parents, staff	English & Spanish	14
Burbank Middle School & Wilson High School	March 15, 2019	Francisco Valenzuela	Los Angeles	Parents, staff	English & Spanish	14

Target Area	1-Los Angeles					
Reporting Period	March 1, 2019 - March 31, 2019					

School	March 15, 2019	Francisco Valenzuela	Los Angeles	Parents, staff	Spanish	14
Burbank Middle School & Wilson High School	March 22, 2019	Francisco Valenzuela	Los Angeles	Parents, staff	English & Spanish	14
Burbank Middle School & Wilson High School	March 29, 2019	Francisco Valenzuela	Los Angeles	Parents, staff	English & Spanish	18
Para Los Ninos Elementary School	03/07/19	Noemy Solis	Los Angeles	Parents	Spanish	75
Para Los Ninos Middle School	03/12/19	Noemy Solis	Los Angeles	Parents and students	Spanish	65
Leo Polity Elementary School	03/29/2019	Noemy Solis	Los Angeles	Parents and students	Spanish	85
Hoover Elementary School	03/30/19	Noemy Solis	Los Angeles	Community at large	Spanish and English	200
ELACC	2/22/19	Rosa	Los Angeles	members	Spanish/English	22
ELACC	3/9/19	Rosa/Emma	Los Angeles	community	Spanish/English	29
ELACC	3/19/19	Rosa	East Los Angeles	community	Spanish	6

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:

GSO staff and volunteers sent texts to 116,853 unique contacts in LA county. The texts sent were either testing out 4 different messages, or texting specifically around events in the community. We texted that there were free tax services in their area and that they can call to make an appointment.

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

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	6	1,001,726	0	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

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

Facebook Digital Ads: \$ 12,962.50
 GSO Staff Salary and Media/Press Consultant: \$3,000
Media Total: \$15,962.50

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:

Examples of Ads (6 in total)



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

Collateral Messaging

Category	Metrics
Number of Flyers/Brochures Distributed	175,000
Number of New Individuals who Received Direct Mailers	0

Narrative of Expenditures in EARS and Outreach Activities

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

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

Multilingual Collateral Printing: \$ 11,444.26
 Production and Design: \$2,750

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

175,000 Benefit Wheel Flyers distributed to LA Partners and Grantees



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

Group Events				
Total Number of Events Held During the Reporting Period			38	
Location	Zip Code	Date	Attendance	Press at Event?
Free Tax Prep			2335 (Total)	No

Target Area	1-Los Angeles			
Reporting Period	March 1, 2019 - March 31, 2019			

Narrative of Expenditures in EARS and Outreach Activities

1) List the various activity-expenditures charging for this month and their cost:
 Event Management: \$2,143.92

2) Provide a brief overview of events conducted during the reporting period: Please see breakdown of events on next page.

Other

Category	Actual (#)

Narrative of Expenditures in EARS and Outreach Activities

GSO Admin: \$4,000

Challenges and Success Stories

Challenge(s) Faced During the Reporting Period

One Success of the program is working with sub-grantees that have been able to support and host more Free Tax Prep and Outreach Events than originally anticipated.

Narrative of Success Stories

Target Area	1-Los Angeles
Reporting Period	March 1, 2019 - March 31, 2019

Success Story #1

Date of Success Story: March

Name of Person from Success Story: Marlene Hoffmann

Zip-Code Where Person Lives: Los Angeles

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

Narrative: For my boys, an extra \$500 will mean their shoes will fit

By Marlene Hoffman, *Special to CALmatters*

Life is full of unexpected turns.

I am 55, have three grown children, and I am in the process of adopting three children I've been caring for. I'm starting over as mom by taking in my two grandsons, who are 22 months and 4 months, and my 10 year-old nephew whom I've raised since he was 2. Unfortunately, their biological parents are unable to care for them.

At one time, I thought that by this age, I would be able to relax a little. But I wouldn't have it any other way. My mom and I were very close, but she passed a few years ago. Now, I have these bundles of energy who fill my life and make me feel happy again. I enjoy seeing everything through their eyes.

I also am raising these boys on my income from the [Eastmont Community Center](#) in East Los Angeles, where I help the foodbank and register our clients for the services they need.

It is at the center where I first learned about the California's Earned Income Tax Credit. People who work for [CalEITC4Me](#) helped me claim the credit. It was about \$300. That money is something I depend on, now more than ever because of my new responsibilities.

I am thrilled that Gov. Gavin Newsom wants to double this tax credit and give more to people like me who are caring for small children. As I understand it, families with children under age 6 will get \$500 extra. Every little bit helps. These babies are growing so fast that it is hard to keep up with the clothes they need, especially their shoes. One day not long ago, we bought four pairs of shoes. They cost \$200.

More money for these boys would mean I could more easily pay for all the things they need. Someday, if I save enough and am lucky, I'd like to take these boys to visit our family whom they've never met in Costa Rica. My mom would love that.

I am incredibly thankful for the kinds of services I've received at Eastmont Community Center and help others get as well. Something is something. It all adds up. It all helps.

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn		Contract Number: 18T-8002	Report Period: 3/1/19 - 3/31/19	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	12,634.20
4.	Media	15,962.50
5.	Collateral Messaging	14,194.26
6.	Group Events	2,143.92
7.	Other 1	.00
8.	Other 2	4,000.00
	Total	48,934.88
20 - TOTAL COSTS		
1.	Total Costs	48,934.88
	Total	48,934.88

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):
Josh Fryday / President

Signature:

Date:
04/22/2019

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: 3/1/19 - 3/31/19	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	8,005.00
4.	Media	19,483.75
5.	Collateral Messaging	21,029.02
6.	Group Events	.00
7.	Other 1	.00
8.	Other 2	1,000.00
	Total	49,517.77

20 - TOTAL COSTS

1.	Total Costs	49,517.77
	Total	49,517.77

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:
04/23/2019

CSD ACCOUNTING USE ONLY

Payment: PCA#

Approved By: Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Golden State Opportunity Fndtn	Contract Number: 18T-8011	Report Period: 3/1/19 - 3/31/19	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	10,000.00
4.	Media	17,925.00
5.	Collateral Messaging	6,480.97
6.	Group Events	.00
7.	Other 1	.00
8.	Other 2	3,000.00
	Total	37,405.97
20 - TOTAL COSTS		
1.	Total Costs	37,405.97
	Total	37,405.97

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: 04/22/2019
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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: 3/1/19 - 3/31/19	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	19,214.62	
2.	Social Media	5,000.00	
3.	Canvassing	5,749.98	
4.	Media	36,825.00	
5.	Collateral Messaging	5,886.39	
6.	Group Events	7,218.11	
7.	Other 1	5,000.00	
8.	Other 2	2,000.00	
	Total		86,894.10
20 - TOTAL COSTS			
1.	Total Costs		86,894.10
	Total		86,894.10

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:
04/22/2019

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: 3/1/19 - 3/31/19	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	4,500.00
4.	Media	18,850.00
5.	Collateral Messaging	.00
6.	Group Events	.00
7.	Other 1	625.00
8.	Other 2	.00
	Total	23,975.00
20 - TOTAL COSTS		
1.	Total Costs	23,975.00
	Total	23,975.00

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: 04/22/2019
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CSD ACCOUNTING USE ONLY

Payment:	PCA#
Approved By:	Date:

2018 CALEITC EDUCATION-OUTREACH EXPENDITURE/ACTIVITY REPORT

Contractor: Koreatown Youth & Comm Ctr Inc		Contract Number: 18T-8003	Report Period: 3/1/19 - 3/31/19	Adjustment: 0
Prepared by (Name/Title): Lidia Sebastian / Cal EITC Program Monitor		E-mail Address: lsebastien@kyccla.org	Telephone: 213-365-7400 ex	Fax Number: 213-927-0017
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		18,641.40	
2.	Social Media		18,641.40	
3.	Canvassing		18,641.40	
4.	Media		14,431.42	
5.	Collateral Messaging		18,641.40	
6.	Group Events		18,641.40	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			107,638.42
20 - TOTAL COSTS				
1.	Total Costs			107,638.42
	Total			107,638.42
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: 04/22/2019
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: 3/1/19 - 3/31/19	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	900.00		
2.	Social Media	.00		
3.	Canvassing	17,250.00		
4.	Media	14,500.00		
5.	Collateral Messaging	1,724.53		
6.	Group Events	11,756.88		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	46,131.41		
20 - TOTAL COSTS				
1.	Total Costs	46,131.41		
	Total	46,131.41		
<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: 04/22/2019
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: 3/1/19 - 3/31/19	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	1,458.17		
2.	Social Media	960.70		
3.	Canvassing	1,677.76		
4.	Media	34,420.33		
5.	Collateral Messaging	50.00		
6.	Group Events	1,659.27		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	40,226.23		
20 - TOTAL COSTS				
1.	Total Costs	40,226.23		
	Total	40,226.23		
<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: 04/18/2019	
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: 3/1/19 - 3/31/19	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	677.01		
2.	Social Media	446.04		
3.	Canvassing	778.96		
4.	Media	27,483.37		
5.	Collateral Messaging	23.22		
6.	Group Events	925.52		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	30,334.12		
20 - TOTAL COSTS				
1.	Total Costs	30,334.12		
	Total	30,334.12		
<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: 04/18/2019	
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: 3/1/19 - 3/31/19	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	724.57		
2.	Social Media	6,593.27		
3.	Canvassing	20,754.79		
4.	Media	27,312.40		
5.	Collateral Messaging	192.62		
6.	Group Events	1,137.84		
7.	Other 1	.00		
8.	Other 2	.00		
	Total	56,715.49		
20 - TOTAL COSTS				
1.	Total Costs	56,715.49		
	Total	56,715.49		
<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: 04/18/2019	
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: 3/1/19 - 3/31/19	Adjustment: 0
Prepared by (Name/Title): Wesley Samms / Development Coordinator		E-mail Address: wsamms@unitedwaysca.org	Telephone: 214-773-8848	Fax Number: 877-908-8922
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		3,744.03	
2.	Social Media		7,527.48	
3.	Canvassing		55,361.79	
4.	Media		28,421.55	
5.	Collateral Messaging		12,892.40	
6.	Group Events		10,697.70	
7.	Other 1		566.26	
8.	Other 2		.00	
	Total			119,211.21
20 - TOTAL COSTS				
1.	Total Costs			119,211.21
	Total			119,211.21
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: 04/23/2019
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: 3/1/19 - 3/31/19	Adjustment: 0
Prepared by (Name/Title): Erin Manning / Finance Manager		E-mail Address: erin.manning@uwccr.org	Telephone: 916-368-3013	Fax Number: 916-368-3013
10 - EDUCATION AND OUTREACH ACTIVITIES				
1.	Web		.00	
2.	Social Media		178.82	
3.	Canvassing		15,239.33	
4.	Media		55,288.07	
5.	Collateral Messaging		.00	
6.	Group Events		8,842.36	
7.	Other 1		.00	
8.	Other 2		.00	
	Total			79,548.58
20 - TOTAL COSTS				
1.	Total Costs			79,548.58
	Total			79,548.58
<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: 04/30/2019
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: 3/1/19 - 3/31/19	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		190.00	
2.	Social Media		95.00	
3.	Canvassing		16,470.05	
4.	Media		6,290.20	
5.	Collateral Messaging		1,438.54	
6.	Group Events		82.79	
7.	Other 1		3,300.97	
8.	Other 2		.00	
	Total			27,867.55
20 - TOTAL COSTS				
1.	Total Costs			27,867.55
	Total			27,867.55
<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: 04/22/2019
CSD ACCOUNTING USE ONLY				
Payment:			PCA#	
Approved By:			Date:	