STATE OF CALIFORNIA—HEALTH AND HUMAN SERVICES AGENCY
DEPARTMENT OF SOCIAL SERVICES
744 P Street • Sacramento, CA 95814 • *www.cdss.ca.gov*

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GUARANTEED INCOME PILOT PROGRAM

REQUEST FOR APPLICATION (RFA)

STATE FISCAL YEARS 2022/23 - 2025/26

Date Issued: July 25, 2022

RFA Webinar: August 8, 2022

Applications Due: September 6, 2022

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I. OVERVIEW

The California Department of Social Services (CDSS) is glad to announce the application to the Guaranteed Income Pilot (GI Pilot) program that will be deployed throughout the state. The GI Pilot will provide unconditional, individual, regular cash payments intended to support the basic needs of the recipients. The CDSS is accepting proposals to grant funds to selected eligible entities for the purpose of administering GI Pilot programs and projects that provide GI to participants.

The CDSS will select entities that demonstrate the ability to administer a GI Pilot program based on the selection criteria indicated in Section IV, Procedures and Awards. Funds will be awarded at the sole discretion of the CDSS.

The CDSS will consider the overall sufficiency and credibility of the information the applicants provide and will evaluate each proposal for the following: (1) representation of awards across urban and rural areas; (2) ability to maximize reach of the statewide pilot program; and 3) program design that aligns with the CDSS' requirements and meets the goals for this pilot program.

Webinar: The CDSS will hold a webinar on August 8, 2022 to describe the scope of services in this RFA, review eligibility requirements, review the application process, and address other administrative requirements. Please make every attempt to participate in the webinar. Register for the CDSS GI RFA Webinar.

Q&A Period: Questions may be sent via email to GIPilot.RFA@dss.ca.gov and must be received by 5:00 p.m. PST on August 10, 2022. Answers will be compiled and posted on a rolling basis to the CDSS GI RFA webpage.

II. SCHEDULE

All milestones, dates, and deliverables are subject to change at the discretion of CDSS.

ACTIVITY	DATE
RFA Release	July 25, 2022
Q&A Period	July 25 – August 10, 2022
RFA Overview Webinar	August 8, 2022, 12:30 p.m. – 2:00 p.m. PST
Application Due Date	September 6, 2022, 11:59 p.m. PST
Tentative Award Notification Date	October 10, 2022

III. GUARANTEED INCOME PILOT PROGRAM INFORMATION

A. PURPOSE AND SCOPE

Welfare and Institutions Code (WIC) sections 18997-18997.2 authorize the CDSS to administer the California Guaranteed Income Pilot Program. The purpose of this program is to provide grants to eligible entities to administer pilot programs and projects that provide a guaranteed income to participants. The Guaranteed Income (GI) Pilot Program will provide unconditional, individual, regular cash payments intended to support the basic needs of the recipients.

Funding under the GI Pilot Program will be granted to eligible entities to enable or expand pilot programs across the state and to administer and evaluate these pilots to inform future policy decisions.

Through this Request for Application (RFA), the CDSS seeks to identify eligible entities to administer the GI Pilot Program. The Program's Priority Populations are: 1) California residents who age out of the extended foster care program at or after 21 years of age; and 2) California residents who are in their first or second trimester of pregnancy at the time of program enrollment.

To be eligible for funding, applicants must: 1) be a public or private nonprofit entity in good standing that is authorized to do business in California, or be a tribal or local government entity, or be a collaboration between such entities; and 2) have secured a 50% funding match for the amount requested from CDSS *or* the application must contain a detailed plan to secure the match funds within six (6) months of the date of the notification of award. See Section III(E), Pilot Eligibility and Guidelines, for details.

Awards may be used to expand existing pilot programs in accordance with the CDSS' priorities and requirements as stated within this RFA, or for the design and implementation of new GI programs in the state.

B. PROGRAM AND EQUITY CONSIDERATIONS

1. **Program Considerations.** Based on input from stakeholders throughout the state, the CDSS has identified the following considerations that will guide the funding and administration of this program, including how pilots will:
   a. Advance system-wide learnings about the impact of GI on individual and family self-sufficiency and wellness outcomes.
   b. Understand how GI interacts with other safety-net benefit programs, including but not limited to Medi-Cal, CalFresh, CalWORKs, and childcare subsidies.
   c. Create opportunities for local flexibility in design and implementation of pilots.

d. Center equity and community voice in design, administration, and evaluation of programs.
e. Wherever possible, reduce barriers to access and prioritize low-burden methods for eligibility verification and payment.

2. **Equity Considerations**
   a. The CDSS believes that GI can be a tool to advance equity for communities that have disproportionately been impacted by poverty and wealth disparities.
   b. The CDSS believes that GI programs should uphold individual dignity and agency and can shift the narrative around deservedness of receiving safety net benefits.
   c. The CDSS will work in partnership with pilot administrators and communities to surface and address equity considerations for participants in terms of race, ethnicity, gender, LGBTQIA (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual) identity, age, disability, housing status, language, immigration status, justice involvement, and/or other factors.
   d. The CDSS encourages pilots to embed an equity-focused approach throughout each dimension of the participant experience, including in outreach, application process and eligibility, support services, experience with the payments, and program exit.

C. PROGRAM REQUIREMENTS

Selected Pilots will:

1. **Determine and Define Recipient Eligibility.** The CDSS is committed to supporting low-income individuals through this pilot program. Pilots shall define recipient eligibility criteria according to the following guidelines:
   a. Individual Income Eligibility
      i. Pilots shall identify individuals to receive GI whose individual incomes fall below a pre-defined threshold.
      ii. Pilots may use their own methodology to determine the individual income threshold. The CDSS encourages a methodology that is easy to understand and accounts for geographic variation in median incomes and/or cost of living, and that may produce varying thresholds based on family size and composition. Such methodologies include but are not limited to the Insight Center's Family Needs Calculator.
      iii. Pilots shall not select a methodology that yields income thresholds that exceed the thresholds provided by the Family Needs Calculator in the relevant locality.
      iv. Pilots shall provide a justification for the selected income threshold methodology.

b. Geographic Eligibility
    i. Pilots may select prospective recipients who reside within any geography that aligns or falls within the area served by the applicant organization(s). This may include specific neighborhoods (defined by zip code, census tracts, or some other geographic boundary), cities, counties, tribal regions, unincorporated areas, or a combination of these. When selecting a geography, pilots shall consider the size of the local population and ability to reach a sufficient number of potential recipients.
    ii. Pilots that wish to serve residents of specific neighborhoods shall target geographies with low median incomes using a methodology of their choosing. If applicable, applicants must provide a justification for selecting specific neighborhoods and for the methodology used to determine the neighborhood's low-income status.
    iii. Regardless of any geographic focus, pilots shall verify recipients' individual income eligibility according to the guidelines on individual income eligibility.

2. **Verify Recipient Eligibility.** Pilots shall define income and geographic eligibility verification processes according to the following guidelines:
    a. Individual income verification: The CDSS strongly encourages pilots to accept self-attestation of individual income to reduce verification burdens on both recipients and pilots and maintain the dignity and agency of recipients.
    b. Geographic verification: Recipients must provide verification that they live in the geographic area that the pilot program is serving. Pilots may accept a variety of documents as proof of residence.

3. **Administer Guaranteed Income Payments.**
    a. Pilots may request funding from the CDSS to support payment disbursement platform services, but it is not required that pilots have a vendor selected at the time of application. Applicants shall include cost information for these services in their proposed budgets.
    b. Based on input from stakeholders and conversations with payment disbursement platforms, the CDSS has developed the following guidelines for pilots as they select a platform for distributing GI payments:
        i. Payment disbursement shall be fast, efficient, and limit documentation burdens for recipients and pilots;
        ii. Disbursement platforms offering income or other eligibility screenings shall offer flexible and low-burden options to verify eligibility, including self-attestation;
        iii. Payment disbursement platforms shall offer multiple methods for recipients to access funds, including individuals who are unbanked and/or who may not have a Social Security Number;

iv. Payment disbursement platforms shall offer access and customer support in multiple languages;
v. Payment disbursement platforms shall be user-friendly for recipients and offer multiple access methods (e.g., web and mobile interface); and
vi. Payment disbursement platforms shall establish data sharing agreements with the statewide evaluator as needed.

4. Provide Optional Benefits Counseling.

a. Pilots shall make benefits counseling available to all participants that will remain optional throughout the pilot period. At a minimum, benefits counseling shall be available prior to enrollment. Applicants shall provide their plan to provide benefits counseling.
b. Benefits counseling shall be available to prospective GI recipients to:
    i. Provide information on how GI may impact recipients' access to public benefits (i.e. CalFresh and CalWORKs), including the potential risks associated with accepting GI funds;
    ii. Support recipients in making informed decisions about whether to participate in the program; and
    iii. Provide information in a language and format that is accessible to prospective recipients.
c. Any additional services offered and/or provided to program recipients must be reported to the CDSS and/or the statewide evaluator at the individual level.
d. Pilots shall not require any benefits consultation or services as a condition for recipients to receive GI.

5. Pursue Benefits Waivers.

a. State funded pilots will automatically receive benefits waivers for CalWORKs with no further action by the applicant.
b. State funded pilots will automatically receive a CalFresh waiver if:
    i. The source of direct GI payments for CalFresh households includes any amount of non-governmental funding, such as philanthropic dollars; and
    ii. Applicants provide an attestation that they will provide ongoing tracking of use of match funds to ensure compliance with the CalFresh exemption requirements.
c. State funded pilots will be responsible for pursuing any and all necessary waivers available for all locally administered programs, including but not limited to:
    i. Housing
    ii. General Relief / General Assistance
    iii. Childcare assistance programs
    iv. Transportation assistance
    v. Utility assistance

6. **Participate in Statewide Research and Evaluation.** The scale and breadth of the statewide GI Pilot program present a unique opportunity to generate data to advance the literature on GI and provide insight to influence future policy. A robust research agenda will help build an understanding of how GI can support low-income communities and will help refine best practices for GI implementation across a variety of local pilot contexts. To take advantage of this opportunity, the CDSS selected an evaluator to lead statewide research and evaluation activities with all selected pilots.
    a. Pilots shall adhere to evaluation requirements for data collection and reporting in partnership with the CDSS and the statewide evaluation partner selected by the CDSS.
    b. Pilots will participate in statewide evaluation activities, which may include, but are not limited to, administering informed consent processes, collecting data for the implementation and/or impact evaluations, recruiting research participants, participating in a steering committee, conducting a hand-off to the evaluator for research activities such as surveys and/or interviews, and participating in learning communities if needed.
    c. Pilot staff shall contribute to the design and implementation of evaluation activities through participation in regular meetings with the statewide evaluator.
    d. Recipients of GI shall be able to opt out of research activities through an informed consent process.
    e. Pilots will collect, at the individual level, and submit via a process determined by the statewide evaluator, the following data, at minimum:
        i. Individuals referred to the GI Pilot program and their eligibility;
        ii. Enrollment dates and drop-out dates, if applicable;
        iii. For all individuals referred, demographic information which may include date of birth, gender identity, and race/ethnicity;
        iv. Programmatic data; such as whether each recipient participated in benefits counseling and the dates that GI payments were disbursed.
    f. Pilots will support the collection of survey and qualitative data for the statewide evaluation following guidance from the statewide evaluator. For example, pilots may be required to enter some participant information into a webform or spreadsheet, provide access to technology for participants to complete surveys (e.g., computer kiosk, on a staff tablet), and conduct outreach to recruit participants for interviews or focus groups.
    g. Pilots planning to partner with a local evaluator shall coordinate with the statewide evaluator and shall adhere to evaluation requirements for data collection and reporting in partnership with the CDSS and the statewide evaluation partner selected by the CDSS. Coordination with local evaluators shall be focused first and foremost on reducing participant burden through activities such as shared recruitment processes and data collection.

h. To guide the evaluation, the statewide evaluator will convene a statewide evaluation steering committee comprised of site-level staff, community members, and other relevant stakeholders. Steering committee members will be asked to reflect on the evaluation design, data collection instruments and approaches, and other matters to ensure that the evaluation is sensitive to the needs of each community.
i. The statewide evaluator will provide an evaluation site-liaison at each pilot site to train program staff how to conduct the informed consent and the randomization processes, as needed. Local evaluation partners shall participate in their site's regular meetings with the statewide evaluator site-liaison to ensure coordination.

7. **Participate in Trainings and Collaborate with the CDSS and Partners.**
    a. Pilots will participate in various trainings to increase knowledge and expertise on grant terms and conditions.
    b. Pilots shall coordinate closely with the CDSS and other program partners, including CDSS partners, to achieve outcomes that will benefit the GI recipients.
    c. Participation in evaluation activities is required, along with implementation of any necessary data sharing agreements and/or Memoranda of Understanding.

8. **Involve Community Voices.** Pilots shall center community voices and expertise in decision-making throughout pilot design, implementation, and evaluation. In facilitating additional forms of community involvement beyond those planned by the statewide evaluator, pilots shall coordinate local efforts with the statewide evaluation to limit burden on program participants.

D. EVALUATION READINESS

1. Among the CDSS' primary learning goals is to understand the effectiveness of GI pilots in improving the well-being, financial security, and stability of participants and their families. Randomized controlled trials (RCTs) can provide the strongest causal evidence about a program's effectiveness and are the fairest way to distribute a program when there are more eligible applicants than there is capacity to serve. To the extent that the statewide evaluator deems it appropriate based on sites' implementation plans, evaluations may use RCT designs.

2. Applicants will be assessed, in part, on experience with, willingness, and readiness to take part in an RCT. Applicants who cannot commit to supporting an RCT design must provide a justification.

3. Applicants must be able to commit to the following statewide evaluation activities:
    a. Follow random assignment procedures to support an RCT design for your pilot, if an RCT is deemed appropriate following collaboration between the pilots and

the statewide evaluator to determine the appropriate evaluation design. This would involve up to half of the eligible population being assigned to a control group that does not receive the GI;

   i. The statewide evaluator will provide Technical Assistance (TA) to pilot sites using an RCT design, which may include a web-based tool to randomize participants and collect enrollment information.

b. Attend monthly meetings with the statewide evaluator and/or site liaisons to discuss ongoing activities such as enrollment, data collection, and evaluation TA needs. Example of TA: randomization "bootcamp" to prepare for an RCT, data collection tools training, informed consent processes training, and support developing basic participant tracking tools;
c. Attend trainings on evaluation and data collection procedures;
d. Follow all informed consent, data security, and recruitment protocols, including forms and language approved by the statewide evaluator's Institutional Review Board (IRB), with guidance from the statewide evaluator;
e. Facilitate primary data collection via surveys at a minimum of two specific time points, including once at the time of application, for both GI recipients and, if an RCT is applicable, those in the control group;
f. Dedicate a minimum of 50% of 1 full-time staff member's time (or equivalent) to evaluation activities and to coordinating evaluation activities with local program operations;
g. Execute data sharing agreements in a timely manner; agreements should address data containing Personal Identifiable Information (PII);

   i. PII elements that may be required include: Social Security Number, Federal Tax ID (EIN), First Name, Last Name, Gender Identity, Date of Birth, Address.
   ii. Selected pilots will be required to be equipped with the necessary data infrastructure to securely track and share participant information, including PII.
   iii. Transfer of PII shall be conducted following secure protocols as established by the statewide evaluator and the CDSS.
   iv. The statewide evaluator will collaborate with pilots to address participants' privacy or safety concerns related to PII and other potentially sensitive data.

E. PILOT ELIGIBILITY AND GUIDELINES

1. **Organization Types**. Any public or private nonprofit entity in good standing and authorized to do business in California, as well as any tribal or local government entity, such as a city, county, or city and county, is eligible to apply for the program.
    a. Partnerships across organizations are encouraged, but a single Lead Applicant must be designated.
    b. An Applicant that is a nonprofit entity shall provide a letter of support from any city, county, or city and county in which the GI Pilot will be operating. This letter is **not** required to come from a Board of Supervisors; for example, a letter from a county welfare department official is sufficient. If a nonprofit Applicant is not able to provide this letter at the time of submitting its application, that Applicant shall, at a minimum, provide proof that a letter of support has been requested. The nonprofit Applicant in this situation shall provide a letter of support prior to signing a grant agreement.

2. **Priority Populations**
    a. The CDSS will give primary consideration to pilots that propose to serve at least 150 individuals, comprised of one or both of the priority populations:
        i. Pregnant California Residents
            1. Prospective recipients who are pregnant must be in their first or second trimester of pregnancy at the time of enrollment.
            2. To verify eligibility, pilots may accept self-attestation that prospective recipients are in their first or second trimester of pregnancy.
        ii. California resident youth aging out of extended foster care
            1. The CDSS will give primary consideration to pilots serving those who are aging out of extended foster care on their 21st birthday during the six (6) month pilot enrollment period. Youth in the extended foster care program who are aging out of probation-supervised placements are also considered part of the priority population.
            2. To verify eligibility, the CDSS encourages pilots to explore approaches that minimize burden on prospective recipients.
    b. Programs that have already launched without a focus on the CDSS' priority populations may still be considered and will be asked to outline any plans for incorporating priority populations into the expansion of their program.
    c. The CDSS may fund pilots that propose to serve populations other than the priority populations based on the applicant's demonstration of the proposed population's need and on the applicant's ability to serve the proposed population. This could include – but is not limited to – similar but broader former foster youth populations.

3. **Individuals Served**
    a. The CDSS will prioritize applications from pilots that aim to serve at least 150 individuals, comprised of one or both of the priority populations.
    b. Applicants proposing to serve fewer than 150 individuals may apply.
    c. Applicants proposing to serve populations other than the priority populations may apply.
    d. Applicants may submit a pooled application with another geographic entity. See Section III(E)(4), Pooled Applications.
    e. Applicants shall develop a comprehensive outreach strategy to ensure inclusive access to the proposed pilot program for eligible populations, including targeted strategies to mitigate any anticipated barriers to access. Pilots shall ensure outreach materials are accessible in multiple languages and in multiple forms (e.g., print, online, text message, etc.), informed by input from community members.
    f. The CDSS may decide to award grant funds to eligible entities in both rural and urban counties in proportion to the number of individuals anticipated to be served by an eligible entity's pilot program.

4. **Pooled Applications.** Entities representing multiple geographies, such as cities, counties, tribal entities, and/or unincorporated areas, may apply together to conduct a single pilot, to pool resources, and/or to meet 150 participants.
    a. Pooled applications are subject to the same requirements as applications representing a single geographic area.
    b. Pooled applicants must meet the following requirements:
        i. Applicants must submit a single application, designate a primary/lead applicant, and present a plan to pool within the application.
        ii. Applicants must include letters of commitment from all entities that intend to contribute to the pooled application in the Appendix.
        iii. Geographies do not need to be contiguous but must be of similar urbanicity. Applicants must describe any other features that demonstrate why the geographies can be combined.
        iv. If awarded a grant, pooled entities shall allocate resources in proportion to each entity's expected number of participants.

5. **Existing GI Pilots.** Both existing and new GI programs are eligible to apply for funding.
    a. Existing programs shall adapt program design and operations to meet the CDSS' requirements, including participation in the statewide evaluation.
    b. Existing programs shall use the CDSS funding to support only new GI participants.
    c. Existing programs shall not use CDSS funding to provide GI payments to participants who are enrolled prior to receiving the CDSS grant award.

d. Existing programs may apply pre-existing grants or funding intended to support the GI Pilot program to the match requirement.
e. Applicants intending to apply existing funds to the match requirement shall submit a letter from the funder stating their acknowledgement and acceptance of this plan.

6. **Minimum GI Payments.** The recommended minimum direct payment is $600 per month per individual. There is no maximum direct payment amount, but it is recommended that payments not exceed $16,000 per calendar year.
    a. Pilots may have additional tax reporting obligations for each recipient receiving more than $16,000 per year.
    b. If an applicant proposes GI payments of less than $600 per month, applicants shall provide a justification in their applications.
    c. The CDSS advises pilot administrators to obtain tax advice on all aspects of administering the GI Pilot.

7. **Support Services.** Pilots may provide other support services in addition to benefits counseling, but they must be optional to participants. Examples include financial counseling or financial literacy education, physical and/or behavioral health support, employment search assistance, and/or a troubleshooting service or hotline to assist program recipients.

F. FUNDING PARAMETERS

1. **Funding Request**
    a. Applicants may request grants of up to $5 million in total funding.
    b. This range also applies to pooled applications (i.e., pooled applicants may request up to $5 million total, regardless of the size or number of entities collaborating in the pooled application).
    c. The CDSS reserves the right to award grants that exceed $5 million, with sufficient justification from the applicant.
    d. The CDSS reserves the right to award funding that is less than the funding request made by the applicant.
    e. All applicants shall provide a rationale/justification for the award amount requested.
    f. Each applicant must provide the average cost of program administration per participant served.
    g. Award amounts will be related to the number of individuals served.

2. **Funding Match**
    a. Applicants shall be funded with a match equal to or greater than 50 percent of the amount of funding to be provided by the State.

b. The match may consist of or include a grant received from another source and may come from multiple sources.
c. CDSS may conditionally approve funding contingent upon a secured match.
    i. If a match is not identified at the time of application, applicants must share their plan for securing a match.
    ii. Applicants that receive conditional approval will have up to six (6) months from notification of award to secure match funding and cannot receive funds from the CDSS until the match is secured.
d. To pursue an income exemption request for CalFresh, the recipients' GI payments must be funded in part from a philanthropic or other private source.
e. Staff time or other in-kind contributions without a defined dollar value may not be counted toward the match requirement.

3. **Funding Period:** Applicants may receive funds for up to a three-year period for:
    a. Planning/Ramp-up Period (up to six (6) months). Pilots will complete the following activities during the planning period if not already completed at the time of application:
        i. Hold community and stakeholder engagement meetings to inform program design;
        ii. Support the statewide evaluator in conducting community and stakeholder engagement to inform the statewide evaluation;
        iii. Procure any necessary tools and support services (e.g., benefits counseling services and/or GI payment disbursement platform);
        iv. Conduct outreach to potential recipients and establish relationships with community-based organizations to support outreach and recruitment;
        v. Finalize operational planning, including developing staffing capacity for ongoing operations and statewide evaluation;
        vi. Develop application and onboarding processes for prospective GI recipients;
        vii. Confirm match funding source(s);
        viii. Establish any necessary MOUs or data sharing agreements; and
        ix. Test enrollment process with a small number of participants (optional).
    b. Enrollment Period. The CDSS recommends pilots plan for a 6-month enrollment period, during which pilots will:
        i. Continue outreach to potential recipients;
        ii. Facilitate the application process for potential recipients, including providing troubleshooting services and live application support if possible;
        iii. Determine eligibility for potential recipients; the CDSS is committed to implementing low-burden approaches to eligibility verification (see Section III(C), Program Requirements, for details);

iv. Select recipients, using random assignment procedures if an RCT is deemed appropriate by the statewide evaluator
v. Provide benefits counseling services (for recipients who opt in) and other onboarding support as applicable.

c. Disbursement Period. The CDSS recommends pilots disburse GI payments to recipients for a minimum of 18 months. The CDSS is open to applicants proposing a shorter or longer disbursement period, but they must provide justification for their decision.
d. Wind-down period (up to six (6) months). Following the GI payment disbursement period, pilots will implement a wind-down period to allow for follow-up data collection and activities related to supporting GI recipients as they transition out of the program, such as optional referrals to benefits enrollment, financial counseling, or any additional services to support program exit.

G. ILLUSTRATIVE MILESTONES AND DELIVERABLES

All milestones, dates, and deliverables are subject to change at the discretion of CDSS.

Milestone	**Period Covered (Estimated)**	**Deliverables**
Grant execution	N/A	• Detailed justification describing the need and the purpose of an advance payment • Updated budget and staffing plan reflecting any revisions completed since RFA response was submitted • Confirmation of match funds, including letter of intent to award, signed grant agreement or other documentation of confirmed match funds. Confirmation is required to execute a grant agreement.
Planning Period	Months 1 – 6 (following grant execution)	Planning period progress report, including description of program design, planned applicant engagement and selection process, and local evaluation design (if applicable).
Enrollment Period	Months 7 – 12	Enrollment period progress report, including summary of implementation of applicant engagement, selection (including randomization procedures if applicable), enrollment, and onboarding processes.

Milestone	Period Covered (Estimated)	Deliverables
Implementation: Months 1 - 12 of GI Payments	Months 13 - 24	Year 1 progress & evaluation report: Summary of recipient demographics and other baseline characteristics; summary of GI payments made to date; early lessons learned on program implementation and program data for those consenting to participate in the evaluation. Information to be collected includes all participants referred, enrolled, drop-outs, benefits counseling offered/received, optional services offered/received and dates for each.
Implementation: Months 13 – 18 of GI Payments	Months 25 – 30	Year 2 progress & evaluation report: Summary of GI payments made to date, ongoing lessons learned on program implementation, and key outcomes, program data.
Wind-down & Close-out	Month 31 – 36	Final evaluation report: Final report on program implementation and outcomes

Funded pilots will be responsible for complying with reporting requirements throughout the grant period including confirmation of compliance with CalFresh income exemption requirements (see Section III(C)(5) for additional information on income exemptions).

IV. PROCEDURES AND AWARDS

A. REVIEW PROCESS

The CDSS has sole discretion to select entities to receive funding for the Guaranteed Income Pilot. The CDSS reserves the right to distribute funding based on regional and programmatic needs, and solicit additional applicants, if necessary.

Applications will be screened for completeness and credibility to determine eligibility. All eligible applications will be evaluated and rated for a potential final award. Incomplete, late, or ineligible applications will not be considered.

Entities selected to receive funding will receive a tentative award and be required to execute a Grant Agreement. **Applicants who are selected for an award contingent on receiving a funding match must secure the match funding within six (6) months of the contingent award. If a selected applicant does not secure the match funding with six (6) months, the CDSS will award funding to the next qualified applicant from a waitlist.**

Please see the schedule outlined in Section II for specific dates and times related to the review process.

B. APPLICATION EVALUATION OVERVIEW

When reviewing proposals, the CDSS will consider information provided in the application, such as: (1) ensuring equitable representation of awards across urban and rural areas; (2) ability to maximize reach of the statewide pilot program; and (3) program design that aligns with the CDSS' recommendations and meets the CDSS' goals for this pilot program. The CDSS will also consider the identified service needs and capacity to assist underserved populations and regions.

The evaluation includes, but is not limited to, the following specific areas as applicable (with approximate point allocations):

1. **Program Design & Priority Populations – 30%**
    a. Identification of potentially eligible populations and expected number of individuals served within each population in alignment with recommendations to serve at least 150 recipients who are low income and members of CDSS' priority populations, with appropriate methodology for determining the size of each population. Pilots serving fewer recipients or non-priority populations will be considered with appropriate rationale; and

b. Alignment with the CDSS' recommendations on disbursement period, direct payment amount, and planning, enrollment, and wind-down activities, or appropriate rationale for any alternative approaches proposed.

2. **Organizational and Partner Capacity and Experience – 20%**
    a. Ability to conduct outreach to reach intended recipients;
    b. Sufficient staff and organizational capacity to implement program in line with the CDSS' requirements;
    c. Staff capabilities and experience serving selected priority populations; and
    d. Demonstrated plan for securing partnerships with other entities as needed to implement the program, secure benefits waivers, implement benefits counseling, and serve the priority populations.

3. **Equity and Community Involvement – 15%**
    a. Demonstrated commitment to low-burden and equitable approach to outreach, enrollment, and eligibility verification;
    b. Articulation of how the applicant will address anticipated barriers faced by members of the priority populations served; and
    c. Clear plan to include members of the priority populations within the community and/or individuals with other relevant lived experience in the pilot design and implementation process.

4. **Evaluation Readiness – 25%**
    a. Willingness and capacity to collaborate with the statewide evaluator;
    b. Organizational capacity to participate in a randomized controlled trial; and
    c. Data collection capabilities.

5. **Budget – 10%**
    a. Applicant demonstrates reasonable implementation costs;
    b. Applicant demonstrates match funding or plan for raising match within six (6) months of award; and
    c. Applicant indicates whether private funds will be included in the recipient GI payments and demonstrates understanding that private funds must be included in the payments in order to secure a CalFresh exemption.

C. APPLICATION APPEALS PROCESS

Applicants wishing to appeal the decision shall submit a written Letter of Appeal via email to GIPilot.RFA@dss.ca.gov no later than 10 business days after the date of the notice of award. The Appeal letter must include the appellant's name, email address, mailing address, telephone number, and set forth the applicant's reasons for appealing the decision. Appeals are limited to grant applicants only. Late appeals shall not be considered.

Upon receiving a complete and timely appeal, an "Appeals Committee" shall be assigned by the Directorate. The Appeals Committee will review and respond to all RFA appeals in writing within 20 business days. The CDSS Appeals Committee decision shall be the final decision on the appeal.

V. GUARANTEED INCOME PILOT FUNDING APPLICATION

A. APPLICATION INSTRUCTIONS

An applicant is required to use this Application form. Attachment A shall be concise and include only the essential information requested.

Applicants shall not alter, delete, or otherwise change any section in the form. All sections in the Application must be completed with the required information. Additional information related to the application may be included in an attachment.

All RFA documents, letters, and materials submitted by an applicant shall be included as part of the final Agreement and shall be binding. Unless noted in the application, it is assumed that the terms within this RFA are acceptable and agreed to by the applicant. The CDSS reserves the right to request additional information or documents after the due date, if needed.

Submitted applications are subject to final approval by the CDSS. Applicants may be required to adjust the number of individuals served and amount requested to meet statewide programmatic needs.

The CDSS reserves the right to: 1) reject any and all applications and/or cancel this RFA; 2) not allocate the full amount of available funding, combine, or adjust the number of Grant Agreements and/or award amounts based on statewide programmatic needs; and 3) offer an award that may include a reduction in the number of individuals served and/or the category of services.

Applicants will not be reimbursed for any expenses incurred in the development of the application or any expenses prior to the execution of the Grant Agreement. All application materials submitted become the property of the CDSS.

Awarded applicants selected by the CDSS will be required to execute and comply with the provisions of the Grant Agreement, this RFA including addendums, and the application submitted by the applicant. Awarded applicants will be required to participate in all of the CDSS' joint activities and financial/data reporting systems. Expenses incurred prior to or after the effective dates of the Grant Agreement are not eligible for reimbursement.

HOW TO APPLY

To be considered for funding, applicants must comply with the requirements described in this RFA. For questions, please contact GIPilot.RFA@dss.ca.gov.

1. To apply, complete the application and submit all applicable attachments **no later than 11:59 p.m. PST on September 6, 2022** to GIPilot.RFA@dss.ca.gov with the subject line: "RFA Guaranteed Income Pilot". **Incomplete or late applications will not be accepted.**
2. Applications must be submitted in PDF formatted documents using the provided application form. **All documents must be submitted as individual PDFs and appropriately titled accordingly to the content of the document.** Altered forms will not be accepted.

ATTACHMENT-A

GUARANTEED INCOME PILOT PROPOSAL

YEAR 2022-23

COVER SHEET

Date	
Lead Organization	
Address	
Executive Director (Name, Phone, Email)	
Primary Grant Administrator Contact (Name, Title, Phone, Email)	
Website	

Fed EIN:	
Tax Exempt Status:	501(c)(3) ☐ or 501(c)(5) ☐
Year Incorporated:	
Date of Last Annual Audit:	
Annual Operating Budget:	
Proposed Funding Request (from Budget Summary)	
Estimated Grant Term: 11/1/2022 - 12/31/2025	

B. APPLICATION CHECKLIST

Use the following checklist to ensure that all documents and forms necessary to respond to this Request for Application (RFA) have been included. Submit a copy of this checklist as the second page of your application as indicated below. All documents, unless otherwise specified, are required for an application to be considered complete. **All subgrantees providing services must meet the funding eligibility requirements and applicants must provide a copy of the applicable documents detailed in this checklist (items 9 and 10).** Incomplete or late applications will not be accepted.

☐	1.	Guaranteed Income Pilot Proposal Cover Sheet (previous page)
☐	2.	Application Checklist (this page)
☐	3.	**Application Form PDF:** Includes answers to narrative questions. The application questions can be found on the CDSS GI RFA webpage.
☐	4.	**Budget Template:** Each applicant must complete the budget template in Appendix 1, including budget commentary, to determine the proposed funding request and provide rationale for the request. The link to the template can be found on the CDSS GI RFA webpage.
☐	5.	**Financial Statement:** Each applicant must submit a scanned copy of the most recent and complete audited annual financial statement (within the past 12 months).
☐	6.	*If applicable - for non-profit applicants only:* Letter of Support (or proof that letter has been requested) from Applicant's County or City: Non-profit applicants must submit a letter of support from any city, county, or city and county in which the pilot will be operating. This letter is not required to come from a Board of Supervisors; for example, a letter from a county welfare department official is sufficient. If this letter is not provided to the Applicant by the County at the time of application, applicants must submit proof that the letter has been requested. Selected applicants will be required to provide a letter of support prior to signing a grant agreement.
☐	7.	**Documentation for match funding:** If available, attach documentation of the match funding, such as a signed grant agreement or letter of intent to award detailing the amount, source, and intended use of the match funds. If you are planning to use pre-existing funds toward the match, the letter shall clearly state the funder's acceptance of this plan. If a match is not identified at the time of application, applicants must describe their fundraising plan (in their answers to the narrative questions) and must submit documentation of the match funds upon receipt.

☐	8.	**Attestation for usage and tracking of match funding:** To obtain an income exemption for CalFresh recipients, provide a brief attestation of the following: 1) applicant will include some amount of private funding in the direct guaranteed income payments to recipients, 2) applicant will track usage of non-governmental funds separately from public funds when completing reporting requirements.
☐	9.	***If applicable:*** **Proof of 501(c)(3) or 501(c)(5) Status**: To access and print proof of active status, visit the Internal Revenue Service Tax Exempt Organization Search tool.
☐	10.	**Proof of "Active" Legal Business Status from the California Secretary of State:** To access and print proof of active status, visit the California Secretary of State Business Search tool.
☐	11.	***If applicable:*** **Documentation of all income exemption waivers received / applied for** (Housing, General Relief, etc.): Applicants that have begun the process of applying for waivers must submit documentation of application or receipt of each waiver.

APPLICATION FORM

GUARANTEED INCOME PILOT

STATE FISCAL YEAR 2022-23

C. PROPOSED FUNDING REQUEST SUMMARY

Please use the budget template in Appendix 1 as a reference tool to determine the proposed funding request for the Agreement term.

GUIDANCE:

1. **Total budget:** Applicants may request funding from CDSS for up to a three-year period and must provide a justification for the award amount requested (see instructions below). The total budget for the program should be inclusive of both the funding requested from the CDSS and the anticipated match funding. The CDSS reserves the right to request further budget information or to adjust funding amounts at the time of grant approval.
2. **Direct and indirect costs:** Direct costs are expenses directly incurred for the specific project or program being funded. Examples include salaries and benefits for staff assigned to work on the project or program, GI payments to recipients, travel expenses, materials, and consultants/contractors required to execute the funded project. They are expenses that would not be incurred if the project or program did not exist. Indirect costs are general overhead and administration expenses that support the entire operations of a grantee.
3. **Indirect cost rate:** The State will reimburse up to 20% indirect cost rate (indirect costs as a percentage of direct cost). NOTE: Evaluation is not considered an indirect cost.
4. **Evaluation:** Pilots that have not partnered with, or do not plan to partner with, a local evaluator (in addition to the statewide evaluator) are **not** required to include evaluation costs in their budget. However, participating in statewide evaluation is required and applicants shall expect that some staff time will be dedicated to supporting evaluation efforts such as data collection. Pilots shall plan for the equivalent of at least 50% of 1 full-time staff member to support statewide evaluation activities and program operations that support the evaluation activities. Additionally, pilots that are partnering with a local evaluator and requesting funding from the CDSS to support a local evaluation shall provide a rationale for the requested funds. Note that the statewide evaluation budget includes funding for incentives for participants engaging in research activities to support the statewide evaluation so applicants should not include incentive payments for the statewide evaluation in their budget proposals.

5. **Community engagement:** Pilots should plan to engage community members, particularly members of priority populations, for input throughout the process of designing the program.
6. **Uses of match funding (private funding included in the payments to recipients):** In order to secure an income exemption for CalFresh, the GI payments line item must be funded by some amount of non-governmental funding for the duration of the disbursement period. For example, the GI payments could be funded (1) entirely by private sources, or (2) by a mix of private and public sources There is no minimum amount of non-governmental funding required as a source of funds for the GI payments, as long as some amount of non-governmental funding is applied to the payments.

INSTRUCTIONS:

1. Populate the budget template in Appendix 1 for each year of the grant, indicating the amount drawn from each funding source (the CDSS' funds and match funds from private, philanthropic, or other government sources).
2. In the budget template, also provide commentary to support the amounts requested for each line item, following the instructions provided in the template and limiting your overall response to 800 words.

D. NARRATIVE QUESTIONS

In the section below, provide information that pertains to the applicants' organization and proposed pilot program. **Respond to each part individually and label all responses accordingly (i, ii, iii, iv, etc.)**

1. APPLICANT OVERVIEW

Please limit your response to this section to 900 words.

a. Organization Types

i. Provide a brief overview of your organization, including mission, objectives, key programs or activities, and priority populations served, and how your staff reflects the communities your organization serves. If applying as a partnership between multiple entities, provide a brief overview of each organization and describe the role of each in designing and administering the proposed pilot. Please identify all the names under which the organizations have operated.

ii. Describe any other partnerships you will leverage to carry out the GI Pilot program, and the role of each partner.

iii. Do you intend to serve rural areas? If so, please briefly describe key features of the rural geography(ies) you will serve as they pertain to the local need for GI, such as availability of and access to resources and support services.

b. Pooled Applications with Another Entity (if applicable)

i. If you propose a partnership between entities representing multiple geographic areas (e.g., cities, counties, tribal communities, and/or unincorporated areas), provide a rationale for administering a single pilot to serve multiple geographies. Provide data demonstrating that the areas are similar in terms of urbanicity (e.g., population density, Census designation). Also, briefly describe any other features that demonstrate why the geographies can be combined.

c. Existing Pilot Programs (if applicable)

i. If you are seeking funding to support a GI Pilot program that has already launched, please provide the following information: Date of launch and current status of program, including number served to date; priority population(s) and geographies served by your program to date; overview of any local evaluation you may be implementing, if applicable, including priority outcomes, design, and data collection methods; and any early findings or lessons learned if available.

d. Pilot Program Goals

i. Please briefly describe your overall goals for your proposed GI Pilot program. What would you like to share about your pilot's design and approach, in the context of the broader community of GI pilots? Please share any additional information about your pilot that is not described in your responses to the questions below.

2. FUNDING PARAMETERS

Please limit your response to this section to 500 words.

a. Funding Match

i. Please describe your funding match commitment(s), including amount, source (including whether it is public and/or private), and intended uses of these funds for the GI pilot. If you have not yet secured the necessary additional funding, please describe your fundraising plan and any contingencies for finalizing match commitments by March 2023, not to exceed six (6) months from receiving a contingent award from the CDSS. In the Appendix, attach documentation of the match funding (if available), such as a signed grant agreement or letter of intent to award detailing the amount, source, and intended use of the match funds. If you are planning to use pre-existing funds intended to support the GI pilot toward the match, the letter shall clearly state the funder's acceptance of this plan.

b. Funding Period

i. Planning period: Please describe the expected duration of the planning period and activities you intend to conduct during this period. If the proposed activities differ from the CDSS' recommendations, please provide a rationale.

ii. Enrollment period: Please describe the activities you intend to conduct during the enrollment period. If the proposed activities differ from the CDSS' recommendations, please provide a rationale.

iii. Disbursement period: What is the expected duration of payments for your program? Please provide a rationale, including any priority population-specific or local context, and reference to the current evidence base. Please provide a justification if you propose a disbursement period other than 18 months.

iv. Wind-down period: Please describe the activities you intend to conduct during the wind-down period. If the proposed activities differ from the CDSS' recommendations, please provide a rationale.

3. PROGRAM REQUIREMENTS AND GUIDELINES

Please limit your response to this section to 1500 words (not including the Tables of Estimated Individuals Eligible and Served, below).

a. Individuals Served & Priority Populations

i. Please describe the population(s) you will serve, including the priority population(s) described above and/or any other population(s) you will prioritize. Please provide a rationale, including how you anticipate GI will impact the proposed population(s).

ii. In the tables below, please provide the overall number of individuals from each population who will become eligible in your geography during the tentative 6-month enrollment period. Separately, estimate the number of participants your pilot will serve during the tentative enrollment period. Provide these estimates separately for those belonging to CDSS' priority population(s), and, if applicable, those belonging to any other populations you will prioritize. (For existing pilots, please indicate the number of new participants your pilot will serve with the CDSS' funding and how you intend to adjust your program eligibility requirements to serve the CDSS' priority populations, if applicable.)

1. Please describe your methodology and data sources for determining the number of individuals eligible and the number of proposed participants. If you plan to serve fewer than the total eligible, please describe how you will make this decision. (Note that an RCT would require randomizing some individuals to receive the program and others to a control group. This is the fairest way to distribute the program when there are more eligible applicants than there is capacity to serve.)
2. If you propose to serve fewer than the recommended minimum of 150 participants in total, provide a rationale for your decision. Note that the CDSS will prioritize applicants serving at least 150 participants but will consider applicants proposing to serve a smaller number.

iii. Please describe how you will meet your enrollment target through outreach and recruitment efforts, and how you will conduct outreach in a way that is as inclusive as possible. Describe the anticipated barriers to engagement and enrollment for the populations you intend to serve and your strategies for overcoming these barriers. If applicable, describe any local partnerships you will leverage to conduct outreach to encourage and facilitate participation of the populations you intend to serve.

TABLES: ESTIMATED INDIVIDUALS ELIGIBLE AND SERVED

Please complete the table(s) below. The priority populations must match the definitions provided by the CDSS in this RFA. If the applicant plans to serve participants who do not belong to the CDSS priority populations, complete the separate table for other populations of focus.

For each table, as applicable, provide your best estimate of the total size of the population that will be eligible for the program during the tentative 6-month enrollment period. For example, for youth aging out of extended foster care, enter the number of youth in extended foster care or probation-supervised placements who will turn 21 during the enrollment period in the proposed service area.

For each table, as applicable, enter the number of participants for each population that you intend to enroll and provide GI payments to. Should you require additional space, you may also submit these tables as a separate attachment.

CDSS Priority Populations (enter N/A if not targeting)

CDSS Priority Population	Estimated number of individuals who will be eligible during the 6-month enrollment period	Estimated number of individuals who will enroll in your pilot and receive GI payments
Youth aging out of extended foster care / probation-supervised placements at age 21		
Pregnant people in their first or second trimester		

Other Populations of Focus

Other Population of Focus	Estimated number of individuals who will be eligible during the 6-month enrollment period	Estimated number of individuals who will enroll in your pilot and receive GI payments

b. Direct Payment Amount

i. What is the expected monthly GI payment amount for your program? Please provide a rationale, including any priority population-specific or local context, and reference to the current evidence base. Please provide a justification for any proposed monthly payment amounts below $600.

c. Benefits Waivers and Exemptions

i. If applicable, please describe the status of all benefits waivers your program has received or applied for (e.g., housing, General Relief, etc.), as well as which waivers your program has decided not to pursue. In the Appendix, attach documentation of any waivers you have already received. If applicable, what is your plan for coordinating with your county on any necessary benefits waivers for locally

administered programs (e.g., General Relief, local housing, transportation, childcare subsidies, and/or utility assistance programs)?

ii. If your pilot has not yet launched and you have not begun the process of securing waivers, please describe which waivers you intend to apply for.

d. Benefits Counseling

i. Please describe your plan for offering and providing benefits counseling, including who will provide the services, any tools or partnerships you will leverage, what the services will include, when they will be offered to recipients, how recipients will access the services, and how you will track information about who was offered benefits counseling and who received it.

e. Other Support Services

i. If applicable, please describe any additional, optional support services your pilot program plans to offer to recipients. Please describe your anticipated process for identifying needs in the community and tailoring support services accordingly, as well as how you will track services offered and services received for each participant.

f. Payment Disbursement Platform

i. Have you selected a partner to support disbursement of GI payments to recipients? If so, please share who you are partnering with and your rationale for choosing this partner (please note that Applicants are not required to have selected a disbursement partner at the time of application but will be required to do so if selected to implement a pilot program).

g. Community Voice and Participation

i. Please discuss how you have engaged, or intend to engage, community members, including members of priority populations, in the process of determining eligibility considerations, other aspects of pilot design, and implementation, to ensure a low-burden, accessible, and dignified experience for GI recipients.

4. RECIPIENT ELIGIBILITY & VERIFICATION

Please limit your response to this section to 700 words.

a. **Income and Geographic Eligibility.** Please describe your intended eligibility requirements related to income and geography, including:
   - **i.** What individual-level income threshold must prospective recipients fall under? Describe your methodology and rationale for selecting this threshold. If using a threshold that varies based on local cost of living and/or household size, please provide an example of the threshold applied to a household of one adult and one child in your geography.
   - **ii.** What geography or geographies must prospective recipients reside in?
     1. Describe whether you will select recipients from across your broad geographic area (such as city or county), or whether you will select only recipients who reside within specific low-income areas (such as zip codes or census tracts). Provide a rationale for your approach.
     2. If you choose the latter approach, also describe your methodology for defining a specific low-income area.

b. **Priority Population Eligibility**
   - **i.** For each population you intend to serve (as indicated in the tables of Estimated Individuals Eligible and Served in question 3(a)), please describe the proposed eligibility requirements for participating in the pilot, including a rationale for selecting each requirement.

c. **Eligibility Verification**
   - **i.** Please share your plan for verifying that prospective recipients meet each income, geographic, and priority population-related eligibility criterion described above, including how your verification processes will minimize administrative burden for prospective recipients (please note that pilots may accept self-attestation of income and pregnancy status).

5. ORGANIZATIONAL CAPACITY

Please limit your response to this section to 1000 words.

a. Serving Populations of Focus

i. Please describe how your organization and/or partner organizations has developed specific competencies, capabilities, and/or infrastructure to serve the proposed population(s). These may include language skills, cultural competencies, appropriate locations, local knowledge, and/or relationships with community-based organizations, etc.

b. Personnel Capacity: Please describe your personnel capacity to design and implement the proposed pilot, including:

i. **If you have already identified personnel,** please identify the staff members who will be supporting the administration of the proposed pilot, including name, position, organization, brief summary of qualifications, brief summary of their role with respect to the proposed pilot, and level of effort devoted to the proposed pilot. Examples of staff members' role may include managing outreach and recruitment, supporting data collection, administering benefits counseling, etc. If you will sub-contract or partner with other organizations to fulfill any of these capacities, please describe those plans as well.

ii. **If you are still identifying personnel for the proposed pilot**, please describe your strategy for securing sufficient capacity in a timely manner, including the timeline to execute your plan. Sufficient personnel to administer the program shall be in place in the early stages of the planning period.

c. Organizational Experience with Program Implementation

i. Please describe your organization's experience implementing and managing similar programs or interventions, such as other financial assistance programs and/or programs specific to your proposed population(s) of focus. Please describe how this experience equips your organization to implement a GI Pilot program.

6. EVALUATION REQUIREMENTS

Please limit your response to this section to 1500 words.

a. Participation in Statewide Evaluation

i. Please describe your ability to support the expected statewide evaluation activities discussed in Section III(D), Evaluation Readiness. If applicable, please describe any TA you anticipate needing from the statewide evaluator to participate in the statewide evaluation.

b. Evaluation Readiness

i. What staff resources do you have to support statewide evaluation activities? Please indicate their role, what percent of FTE they will dedicate to supporting evaluation activities, and what relevant experience to conducting evaluations/data collection they hold.

ii. What other relevant experience does your staff/organization have with participating in survey data collection and research studies? If applicable, describe the modes or platforms of data collection you have supported, including in-person, mail/telephone, online, etc.

iii. What resources can your organization offer to support participation in follow-up surveys, particularly to participants in control or comparison groups,[1] at enrollment, near exit, and after the pilot has ended? This should involve administering informed consent to participate in the research, gathering or confirming contact information, helping to facilitate contact with participants, and potentially distributing and/or administering surveys (mode or platform to be determined in collaboration with the statewide evaluator).

iv. Do you have access to administrative data from any local or county agencies? If so, describe the administrative data you have access to and how you could support the statewide evaluator with accessing that data.

v. Has your staff/organization ever participated in an RCT? If yes, briefly describe the RCT and your role in supporting it.

vi. The statewide evaluator will collaborate with selected sites to determine the appropriate evaluation design, with a preference for conducting an RCT where appropriate. This may require the pilot to support the evaluation by incorporating a study randomization and consent procedure into the program enrollment process (with assistance from the statewide evaluator). If your organization is unwilling to consider participating in an RCT, please provide a rationale.

c. Evaluation Partners

i. Does your pilot program have a local evaluation partner or plan to work with a local evaluation partner? If so, explain how you will support coordination between the

[1] The evaluation may involve control or comparison groups. These groups would consist of individuals who will not receive GI, who would be compared to those receiving GI.

local evaluator and the statewide evaluator. If your local evaluation has already launched, describe your ability to participate in and manage two simultaneous evaluations. Please also describe how you have engaged or will engage the community in defining the goals of the local evaluation, and the status of the evaluation.