
Individual Taxpayer Identification Number (ITIN) and Financial Assistance Initiative Community Outreach Report

Office of Community Partnerships and Strategic Communications

June 2025



The Office of Community Partnerships and Strategic Communications (OCPSC), housed within the Governor's Office of Service and Community Engagement (GO-Serve), initiates and executes campaigns related to the state's highest priority public awareness and community outreach efforts. As the single state entity coordinating California's most important community engagement efforts, OCPSC allows the state to realize more inclusive and effective outcomes while preventing equity gaps in statewide outreach.

At the heart of OCPSC is a statewide trusted messenger network that brings government resources directly to Californians through community-rooted relationships.

As the state entity charged with coordinating California's priority outreach campaigns, OCPSC was tasked by the Legislature to raise public awareness on the Individual Taxpayer Identification Number (ITIN), a tax processing number issued by the Internal Revenue Service (IRS) to individuals not eligible for a Social Security number. Filing taxes with an ITIN allows eligible Californians to access crucial financial benefits like the California Earned Income Tax Credit (CalEITC), the Young Child Tax Credit (YCTC), and, more broadly, helps build a foundation for financial stability, including opening a bank account, building credit, and applying for college financial aid or home loans.



Valle Central
Taller Virtual Sobre ITIN

Sabías que puedes presentar tus impuestos, reclamar créditos fiscales y establecer un negocio sin tener un número de seguro social: ¡simplemente usa un ITIN!

Conéctate a nuestro taller de ITIN, donde expertos te explicarán qué es un ITIN y te ayudarán a comprender el proceso de solicitud. Conoce las ventajas y recursos para los titulares de ITIN, como abrir una cuenta bancaria, calificar para una hipoteca de

Miércoles, 14 de agosto de 2024
6:00 PM - 7:30 PM
Facebook Live (en vivo)
Facebook.com/ca/ocpsc

APRENDE COMO:
• Solicitar un ITIN
• Presentar tus impuestos GRATIS
• Acceder a recursos financieros



CALIFORNIA COMMUNITY RESOURCE GUIDE
California State Resources designed to
Support You & Your Loved Ones

Benefits include:

- Financial assistance
- Employment services
- Low-cost healthcare
- Housing and transportation
- Food access
- Mental health support

Check It out!
Scan the QR code, or visit ocpsc.ca.gov/resources-guide to access the California Community Resource Guide. No personal information is required to visit.

Thank you to you #1

Building on the successes of its first year, OCPSC deepened its partnerships, expanded its outreach capacity, and strengthened messaging strategies to reach even more Californians in its second year.

Between **April 2023 and May 2024**, OCPSC partnered with community-based organizations (CBOs) to develop culturally relevant, multilingual educational materials and workshops to ensure that community was aware of who is eligible for ITINs, what the process is for applying and renewing, and where to go to get help. This effort enabled CBO partners to reach over one million people through activities, including door-to-door canvassing and outreach events. These efforts not only increased community awareness of the ITIN, but also equipped CBOs to address key barriers, such as a lack of trusted tax filing support and widespread misinformation.

From **June to November 2024**, OCPSC expanded these efforts by hosting multiple trainings and discussions with CBO partners on the benefits and process of obtaining an ITIN, and to better understand community needs. One training was broadcast live on OCPSC's Facebook page and featured subject matter experts from the IRS, The Academy of Financial Education, and Merchant Bank. These experts shared practical guidance, in Spanish, based on their experiences with ITIN applicants and holders. OCPSC also coordinated with regional tax and ITIN experts to deliver in-person and virtual trainings tailored to CBO partners' and their community's needs.

In **December 2024**, in response to community concerns about anticipated federal policy changes, OCPSC broadened its focus from ITIN-specific outreach to a comprehensive financial assistance campaign. This transition continued to include ITIN education where CBOs felt appropriate, while also spotlighting programs such as the Volunteer Income Tax Assistance (VITA) program and the California Earned Income Tax Credit (CalEITC). These efforts aimed to increase community awareness of and access to California's financial support programs.

To initiate this transition, OCPSC hosted a **Financial Wellness Week of Action** from **January 31 to February 7, 2025**, aligning with CalEITC Awareness Week and the start of tax season. Financial Wellness Week of Action highlighted programs featured in the [California Community Resource Guide](#) and encouraged OCPSC partners to share the financial resources most relevant to their communities. [Key programs](#) included:

- California Earned Income Tax Credit (CalEITC)
- Foster Youth Tax Credit (FYTC)
- Individual Taxpayer Identification Number (ITIN)
- Volunteer Income Tax Assistance (VITA) Program
- Young Child Tax Credit (YCTC)

By the Numbers

Between June 2024 - June 2025, OCPSC accomplished the following by the numbers:

14 meetings

3 trainings/workshops

5 presentations at OCPSC Statewide Briefings

22 Collective Impact Table discussions

351,000 flyers distributed

19 unique assets in 44 languages

366,000 conversations



Lessons Learned

- **Evolving community interests.** Expanding the campaign to include broader financial assistance (e.g., VITA, FYTC, YCTC) received positive feedback and demonstrated strong demand for financial education beyond ITINs.
- **Challenges in measuring impact.** A lack of disaggregated data on ITIN-eligible populations, especially non-U.S. citizens, made it difficult to assess outreach effectiveness.
- **Community hesitancy and fear.** Mistrust of government and fear of deportation made it difficult to engage community members on the topic of ITINs and broader financial programs, with 11% of partners reporting decreased community participation due to immigration-related concerns.
- **Trust-building needs.** Effective outreach on sensitive topics requires culturally relevant messaging and trusted messengers. In-person events tied to cultural celebrations (e.g., Lunar New Year, Black History Month) helped build trust and boost engagement.
- **Limited availability of certified support.** A shortage of IRS-certified CAAs posed a barrier for those needing in-person ITIN assistance.
- **Reluctance to mail original documents.** Many community members were unwilling to mail original identification documents, fearing loss or mishandling.
- **Split motivation in applying for ITINs.** Following federal changes, community members expressed mixed levels of interest in applying for ITINs. Some felt a renewed motivation to be in good standing with government and the tax system and wanted access to available tax credits, while others remained hesitant due to fears around data sharing and uncertainty about long-term implications.

Who are our partners?

[OCPSC Trusted Messenger Network \(TMN\)](#)

The TMN works directly with communities across the state to share multilingual, culturally relevant information about ITINs. These partners educate eligible applicants and connect individuals to local Volunteer Income Tax Assistance (VITA) sites. Some CBOs also serve as VITA sites and Certified Acceptance Agents (CAAs), leading regional trainings on ITIN-related tax benefits and application processes.

[California Franchise Tax Board \(FTB\)](#)

[Homepage](#) | [FTB.ca.gov](#)

As a key subject matter expert, FTB provides authoritative information on state tax credits, including the California Earned Income Tax Credit (CalEITC), the Young Child Tax Credit (YCTC), and the Foster Youth Tax Credit (FYTC). OCPSC refers community members to FTB's resources and website to get accurate tax guidance.

[California Department of Community Services and Development \(CSD\)](#)

In partnership with FTB, manages the CalEITC Education and Outreach Grant to increase awareness of available tax credits and ITIN benefits.

[Internal Revenue Service \(IRS\)](#)

As the federal agency overseeing the ITIN and VITA programs, the IRS brings subject matter expertise on ITIN eligibility, application processes, and CAAs. They have provided presentations and trainings to the TMN, helping ensure community partners have accurate, up-to-date information to share with their communities.

[Golden State Opportunity \(GSO\)](#)

As a grantee of CSD and OCPSC, GSO delivers trainings and workshops focused on tax credits and ITIN education. As subject matter experts, they contribute valuable insights and support the development of ITIN and tax credit outreach materials.

[United Ways of California](#)

As a grantee of CSD, United Ways of CA serves as a subject matter expert on the benefits of ITINs and available tax credits. They have supported OCPSC by providing presentations and workshops to the TMN, helping increase understanding of the financial tools available to ITIN holders.

OCPSC Trusted Messenger Network Reflections



From June through December 2024, CBOs were at the heart of OCPSC's ITIN public awareness campaign, organizing trainings, hosting working sessions, and mobilizing direct outreach.

Many CBOs shared that despite uncertainties, their communities felt a strong need to act. One partner put it simply: ***"We need this now more than ever."***

That sentiment echoed across communities. Even in uncertain times, CBOs saw a strong desire for information and action. In some cases, individuals were reached four to five times through ITIN clinics.

At the same time, CBOs noted a shift. With new concerns around the IRS and Department of Homeland Security data sharing agreement, many were more cautious in their messaging. While they had long encouraged individuals to apply for or renew ITINs, they now focused on helping people make informed choices, without offering direct recommendations.



This uncertainty hasn't halted engagement entirely. While some individuals have chosen to pause or delay their ITIN applications, most CBOs noted that the anticipated drop-off hasn't been as steep as expected. In fact, many community members still view tax filing and ITINs as a meaningful way to demonstrate stability, responsibility, and long-term presence in the United States.

As OCPSC shifted its focus to promoting [California financial assistance programs](#), community members responded positively to the expanded information. Many were unaware that they qualified for CalEITC or that they could file their taxes for free with the VITA program. The messaging, centered on financial empowerment and long-term planning, resonated deeply, especially among families with young children and low-wage workers. CBOs adapted quickly, integrating these new resources into existing outreach and tax assistance programs.



ocpsc.ca.gov • info.ocpsc@opr.ca.gov

