



# County of Monterey

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

## Board Report

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**File #:** A 21-569, **Version:** 1

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- a. Approve and authorize the Director of the Department of Social Services to sign an agreement with United Way Monterey County for financial literacy workshops and income tax preparation assistance in the amount of \$120,000 for the period of January 1, 2022 to December 31, 2023; and
- b. Authorize the Director of the Department of Social Services to sign up to three (3) amendments to this agreement where the total amendments do not exceed 10% (\$12,000) of the contract amount and do not significantly change the scope of work.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and authorize the Director of the Department of Social Services to sign an agreement with United Way Monterey County for financial literacy workshops and income tax preparation assistance in the amount of \$120,000 for the period of January 1, 2022 to December 31, 2023; and
- b. Authorize the Director of the Department of Social Services to sign up to three (3) amendments to this agreement where the total amendments do not exceed 10% (\$12,000) of the contract amount and do not significantly change the scope of work.

### SUMMARY/DISCUSSION:

The Monterey County Community Action Partnership (MCCAP) within the Department of Social Services (DSS) administers federal community service block grant (CSBG) funds allocated to the county by the California State Department of Community Services and Development (CSD). MCCAP directs CSBG funds to support a variety of services within Monterey County. Service priorities are identified through the bi-annual Community Action Plan process which includes community input. Contractors are selected through a competitive Request for Proposals (RFP) process.

This agreement will provide financial literacy education and assistance with the preparation of income tax documents to low-income residents. Financial literacy curriculum content addresses asset building, predatory lending, fair housing, credit repair, banking, tax credits, Free Application for Federal Student Aid, Dream Act and tax completion. The tax preparation program provides free tax preparation services for low-income individuals with the goal of ensuring that working people obtain all the tax credits and refunds they are due without having to pay fees. In the 2020 tax season, UWMC filed 1,232 tax returns for Monterey County residents, resulting in more than \$2.2 million in State and Federal refunds, as well as more than \$137,000 being returned to Individual Taxpayer ID Number filers. These services will assist low-income individuals and families understand and have greater control over their personal finances and obtain tax credits and refunds many residents are not aware of.

### OTHER AGENCY INVOLVEMENT:

CSBG funding requires intergovernmental coordination, including adherence to state and federal reporting requirements. Development and implementation of the CSBG local plan requires departmental coordination, both within DSS and across the county, and among the county's network of service providers. The Auditor-Controller has reviewed and approved this Agreement. County Counsel has approved the agreement as to form.

FINANCING:

This agreement is funded with CSBG funds. Sufficient appropriations and estimated revenues for Social Services Community Action Partnership Fund 008-5010-SOC007 are included in the FY 2021-22 Adopted Budget. Funding for future years will be incorporated in the corresponding budget process.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

This agreement correlates with the Health & Human Services Strategic Initiatives adopted by the Board of Supervisors by allowing the Department to continue to receive State and Federal funding to provide programs and services to very-low-income residents of the County.

Mark a check to the related Board of Supervisors Strategic Initiatives

☐ Economic Development  
☐ Administration  
☒ Health & Human Services  
☐ Infrastructure  
☐ Public Safety

Prepared by Denise Vienne, Management Analyst II, x4484

Approved by Lori A. Medina, Director, x4430

Attachments: Agreement

Proposed agreement is on file with the Clerk of the Board as an attachment to this Board Report