

# Attachment B

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# Attachment B



Monterey County  
 Economic Development Department  
 168 West Alisal St., 3rd Floor  
 Salinas, CA 93901  
 Darby Marshall [Marshalld@co.monterey.ca.us](mailto:Marshalld@co.monterey.ca.us)  
 831-755-5391

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## Monterey County - CDBG Application For Funding - FY 2025-26

Monterey County
Status: Choose: <span style="float: right;">▼</span>
<b>Program/Project Status:</b>
<input type="checkbox"/> Recommended for Funding Amount:
<input type="checkbox"/> Subrecipient Budget Revised
<input type="checkbox"/> Contract Signed
Comments:

[Click Here](#) to see the NOFA/Request for Proposals Instructions for Monterey County. [\(Spanish\)](#)

Application			
<b>Part 1 - General Information</b>			
Legal Name of Organization Submitting Proposal:	Alliance on Aging, Inc.		
Program/Project Name:	Outreach Services		
Person Completing Application:	Tamara McKee	Title:	Programs Director
Direct Telephone:	8315957745		
Email Address:	tmckee@allianceonaging.org		
Authorized Official: (e.g. Exec. Dir.):	John McPherson	Title:	Executive Director
Direct Telephone:	8316554240		
Email Address:	jmcperson@allianceonagi		
Program/Project Contact:	Tamara McKee	Title:	Programs Director
Direct Telephone:	831 595-7745		
Email Address:	tmckee@allianceonaging.org		
Authorized Contact:	Tamara McKee	Title:	Programs Director
Direct Telephone:	831 595-7745		
Email Address:	tmckee@allianceonaging.org		
Finance Contact:	Anh Le	Title:	Finance Manager
Direct Telephone:	8316554248		
Email Address:	ale@allianceonaging.org		
Organization Mailing Address:	247 Main Street	City:	Salinas      Zip: 93901
Organization's Website Address:	allianceonaging.org		
Organization Telephone:	831 655-1334		
Organization Fax:	8316558781		
Tax ID Number:	94-1747036 <i>9 digits, format xx-xxxxxxx</i>		
Organization DUNS Number:	02-406-4826 <i>9 digits, format xx-xxx-xxxx</i> <a href="#">(Get a DUNS #)</a>		
Monterey County Customer/Vender Number:			
Type of Organization (check all that apply):	<input checked="" type="radio"/> Non-Profit <input type="radio"/> Public Agency <input type="checkbox"/> CHDO <input type="checkbox"/> CBDO <input type="checkbox"/> Faith-Based		
What is your agency's fiscal year?	July 1 - June 30		
Date of your organization's most recently completed audit. (Month/Year)	Dec 2024		
Was this audit conducted in compliance with the Single Audit Act?	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Are there any outstanding audit findings which remain unresolved?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Are you a Legal Services provider?	<input type="radio"/> Yes <input checked="" type="radio"/> No		

[Save and Continue](#)

### PART 2 - ACTIVITIES AND AMOUNTS REQUESTED

Select type of Consolidated Plan Goal, Target Population, and Emphasis then click to Update Application
<b>We are applying for funding from:</b> <input checked="" type="checkbox"/> Monterey County
Please provide a name for each activity in your program. Most programs have only 1 activity. If your program has more than 1 distinct activity that your service provides, please list up to 3 total.

Number of Activities: <input type="text" value="2"/>	
Description of Activity	
Activity #1	Benefit Check-up (BCU) \$12,382
Activity #2	Tax Counseling for the Elderly (TCE) \$12,618
<b>Program Total</b> \$25,000	

**A. Con Plan Goal:** Select the Con Plan Goal that fits your program  
Public Services ▼

**B. Target Population:** Select the Target Population(s) that fits your program.  
Multiple items can be selected.

<input checked="" type="checkbox"/> Extremely Low Income (30% AMI)	<input checked="" type="checkbox"/> Low Income (50% AMI)	<input checked="" type="checkbox"/> Moderate Income (80% AMI)
<input type="checkbox"/> Large Household (5+ members)	<input type="checkbox"/> Families with Children	<input type="checkbox"/> Mentally Ill
<input type="checkbox"/> Chronic Substance Abuse	<input checked="" type="checkbox"/> Veterans	<input type="checkbox"/> Unaccompanied Youth
<input checked="" type="checkbox"/> Elderly (62 and older)	<input checked="" type="checkbox"/> Frail Elderly	<input type="checkbox"/> Persons with Mental Disabilities
<input checked="" type="checkbox"/> Persons with Physical Disabilities	<input checked="" type="checkbox"/> Persons with Developmental Disabilities	<input type="checkbox"/> Persons with Alcohol or Other Additions
<input type="checkbox"/> Persons with HIV/AIDS	<input type="checkbox"/> Victims of Domestic Violence	

**C. Con Plan Emphasis:** Select the Con Plan Emphasis that fits your program  
Health Services; Senior Services ▼

[Click Here to Update Application](#)

**PART 3 - PROJECT ELIGIBILITY**

1. Our proposal is for a **Public Service** program.

2. Select the type of assistance you provide. For additional guidance please reference the [Matrix Code Definitions](#). Note that some choices do not allow LMA.

05A - Senior Services ▼

3. Mark the box below that indicates the national objective met:

- Activities Benefiting Low and Moderate-Income Persons. 570.208(a)**
  - LMC-Limited Clientele. 570.208(a)(2).
- Slum and Blight. 570.208(b)** Activities that aid in the prevention or elimination of slums or blight.
- Urgent Need. 570.208(c)** Community development activities having an urgent need. This objective rarely applies and is reserved for alleviating emergency situations such as natural disasters.

**4. Outcome Performance Measurement**

**A. Please choose the most appropriate performance measurement objective**  
Create Suitable Living Environments ▼

**Creating Suitable Living Environments** relates to activities that are designed to benefit communities, families, or individuals by addressing issues in their living environment. This objective relates to activities that are intended to address a wide range of issues faced by low and moderate income persons, from physical problems with their environment, such as poor quality infrastructure, to social issues such as crime prevention, literacy or elderly health services.

**Providing Affordable Decent Housing** covers the wide range of housing activities that are generally undertaken with HOME or CDBG funds. This objective focuses on housing activities whose purpose is to meet individual family or community housing needs. It does not include programs where housing is an element of a larger effort to make community-wide improvements, since such programs would be more appropriately reported under Suitable Living Environments.

**Creating Economic Opportunities** applies to activities related to economic development, commercial revitalization, or job creation.

**Tip: When selecting an objective, ask:** What is the purpose of the activity? What is the larger community need that I am seeking to address?

**B. Please choose the most appropriate performance measurement outcome.**  
Availability/Accessibility ▼

**Availability/Accessibility** applies to activities that make services, infrastructure, public services, public facilities, housing or shelter available or accessible to low- and moderate-income people, including persons with disabilities. In this category, accessibility does not refer only to physical barriers, but also to making the basics of daily living available and accessible to low- and moderate-income people where they live.

**Affordability** applies to activities that provide affordability in a variety of ways to low- and moderate-income people. It can include the creation or maintenance of affordable housing, basic infrastructure hook-ups, or services such as transportation or day care. Affordability is an appropriate outcome whenever an activity is lowering the cost, improving the quality, or increasing the affordability of a product or service to benefit a low-income household.

**Sustainability** applies to activities that are aimed at improving communities or neighborhoods, helping to make them livable or viable by providing benefit to persons of low- and moderate-income or by removing or eliminating slums or blighted areas, through multiple

activities or services that sustain communities or neighborhoods.

**Tip: When selecting an outcome, ask: What type of change or result am I seeking?**

**5. Describe the population/target group your project will serve and how low and moderate-income persons will benefit.**

Target population for AOA's Outreach/Benefit Check-up & Tax Counseling Programs are senior residents of HUD designated areas of Monterey County. Their monthly expenses exceed their earned income or meager social security benefit. We will provide direct, individualized service to prepare Client's State and Federal taxes, and we will screen one's eligibility for various low-income assistance programs including Medi-Cal, Medicare-related expenses, CalFresh, Transportation, PG&E bill.

You have 13 characters left.

**6. How will people or conditions in the community change as a result of what you do?**

Free options available to seniors can be explained, in simple terms, by our trained staff/volunteers. The Alliance on Aging offers services that can help lower health care coverage costs, provide financial relief with income tax refunds, and information about benefits and discount programs. We also partner with other agencies/services and can direct seniors to their programs. This allows seniors to remain in their homes, be engaged in their local communities, be independent and healthy.

You have 9 characters left.

Check if the proposed activity will:

- Help prevent homelessness?
- Help those with HIV or AIDS?
- Help the homeless?
- Help the disabled?

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**PART 4 - SCOPE OF WORK**

For the scope of work(SOW), the agency will provide an overview of the project and what services can be expected. The SOW will outline exactly what each party expects to receive at the completion of the project. It will show what the clientele will receive, and the agency will be compensated for the deliverables.

**1. Short description of proposed project for which funding is requested. (50 to 100 words maximum)**

AOA provides outreach, benefits assistance, Medicare counsel to seniors in multiple senior venues throughout the County. Since 2021 AOA has had a weekly presence at Taylor Farms Wellness Center where staff offer information & benefits assistance. The center attracts seniors and their families seeking information and resource packet. AOA participates in Meals on Wheels monthly congregate luncheon/social affairs in Greenfield, Gonzales, Marina, unincorporated areas of Monterey County and numerous low-income senior

You have 64 characters left.

If the selected National Objective uses Income Certification (most common), please ensure the description you provide clearly shows how your agency will document in a written form that the clientele met the income of the target population.

**2. Target Population Verification:** Describe how you will verify that the beneficiaries chosen above is a member of the target group  
Income Certification

**NOTE:** If the agency is awarded an amount and it is lower than what is requested, be sure to adjust persons served, if needed, with the County prior to the subrecipient agreement creation.

**3. Location of Services:** Select the number of Unduplicated Beneficiaries you expect to serve in the following communities:  
**NOTE:** Funds received from Monterey County may ONLY be spent to provide services to persons or households who live in the areas listed below

"Unduplicated" means unduplicated across all your activities, not per activity. Unduplicated listed for Activity 2 must not be included in Activity 1, etc.

Location	Benefit Check-up (BCU)	Tax Counseling for the Elderly (TCE)	Total
Gonzales	10	40	50
Greenfield	10	40	50
Marina	5	100	105
Sand City	0	0	0
Unincorporated - North County	5	75	80
Unincorporated - South County	5	15	20
Unincorporated - Salinas Valley	5	5	10
<b>Total</b>	<b>40</b>	<b>275</b>	

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Agencies are required to provide what distinct activity they will provide. Part of this activity includes the number of unduplicated beneficiaries projected to be served by the activities. This means the person participating in the activities during the reported year is only counted once. It could be that the person participated in an activity every quarter; however, they should only be counted one time. Therefore, even if they participated in three different activities, they would only be counted one time.

**Activity #1: Benefit Check-up (BCU)**

Number of Unduplicated Beneficiaries previously served by this activity.  
Monterey County

Period	Actual	Monthly Average
July 1, 2023 - June 30, 2024	104	9
July 1, 2024 - December 31, 2024	54	9

Number of Unduplicated Beneficiaries projected to be served by this activity. (Must total , from Beneficiaries Table)

Activity	1st Quarter		2nd Quarter		3rd Quarter		4th Quarter		Total
	# Served	%	# Served	%	# Served	%	# Served	%	
Benefit Check-up (BCU)	10	25%	10	25%	10	25%	10	25%	40

Number of Low/Mod Unduplicated Beneficiaries to be served by the activity

Monterey			
Period	Total Number of Beneficiaries Estimated to be Served FY25/26	Total Number of Low/Mod Income Beneficiaries Estimated to be Served FY25/26	Overall Percent of Low/Mod Income Persons Served
July 1, 2025 - June 30, 2026	40	35	88%

Agencies are required to provide what distinct activity they will provide. Part of this activity includes the number of unduplicated beneficiaries projected to be served by the activities. This means the person participating in the activities during the reported year is only counted once. It could be that the person participated in an activity every quarter; however, they should only be counted one time. Therefore, even if they participated in three different activities, they would only be counted one time.

**Activity #2: Tax Counseling for the Elderly (TCE)**

Number of Unduplicated Beneficiaries previously served by this activity.

Monterey County		
Period	Actual	Monthly Average
July 1, 2023 - June 30, 2024	0	0
July 1, 2024 - December 31, 2024	0	0

Number of Unduplicated Beneficiaries projected to be served by this activity. (Must total , from Beneficiaries Table)

Activity	1st Quarter		2nd Quarter		3rd Quarter		4th Quarter		Total
	# Served	%	# Served	%	# Served	%	# Served	%	
Tax Counseling for the Elderly (TCE)	0	0%	0	0%	225	82%	50	18%	275

Number of Low/Mod Unduplicated Beneficiaries to be served by the activity

Monterey			
Period	Total Number of Beneficiaries Estimated to be Served FY25/26	Total Number of Low/Mod Income Beneficiaries Estimated to be Served FY25/26	Overall Percent of Low/Mod Income Persons Served
July 1, 2025 - June 30, 2026	275	225	82%

**4. Provide any additional relevant description of proposed activity or project (not to exceed 250 words).**

We'll provide services at Taylor Farms Clinic at other venues in Gonzales, Greenfield & Marina. Staff will assess senior's eligibility for low-income programs and proceed w/ completion of application(s). Benefit Check-up includes health care costs, transportation, access to food, household costs. Resource packets will be distributed during outreach. Weekly tax preparation will be offered at Marina & Greenfield Libraries during tax season. Tax services is offered at numerous other sites as well.

You have 1 characters left.

**5. Provide a timetable for accomplishing objectives. Upload Project Timetable or complete the table below.**

Number of milestones needed:

Description of Activity/Milestone	Est. Completion Date
Benefit Check-up Individualized Assistance	6/30/2026
Tax Counseling for the Elder Individualized Federal/State Tax Preparation	6/30/2026

**6. If this is a new project, describe how you will reach out to the proposed beneficiaries?**

Upload your outreach plan. If not available at time of application, the plan will be required to be submitted if your project is funded prior to disbursement of HUD funds.

Staff will participate in outreach events. Being at Taylor Farms Center and numerous low-income senior housing complexes, we will continually have opportunity to reach a growing number of our target population. North/South County monthly congregate meals/socials have been popular; we are afforded access to seniors. We will continue to work with local groups and organizations, schools, the faith community to get access to the families of seniors who are often seeking resources on their behalf.

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**7. How will you measure the effectiveness or impact of your project in meeting the needs of the persons assisted with these HUD funds?**

Most of our agency's programs are tied into federal or state entities which require thorough documentation. We collect both quantitative and qualitative data. Effectiveness of our efforts will be measured by the number of seniors that are assessed for 'low-income benefit programs' with subsequent application assistance conducted by staff, and the number of seniors served with the filing of State and Federal taxes. As a program of the IRS, Tax Counseling for the Elderly continuously exceeds goals

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Positions to be Funded

Please list each position for the activity for which funding is requested. Complete all columns with entry boxes.

Number of lines needed:

Job Title	% of FTE	Requested Personnel Funding, Benefit Check-up (BCU)	Requested Personnel Funding, Tax Counseling for the Elderly (TCE)
Outreach/BCU Manager	10%	\$5,712	
Program Assistant	10%	\$4,284	
Tax Coordinator	25%		\$5,525
<b>Activity Total</b>		\$9,996	\$5,525

Sources and Uses for FY25/26.

Sources of Funds

Budget Category	Agency-Wide Fiscal Year Sources for July 1, 2025 to June 30, 2026	Sources for THIS PROGRAM July 1, 2025 to June 30, 2026	Sources for Benefit Check-up (BCU)	Sources for Tax Counseling for the Elderly (TCE)	Program As Share of All Agency Programs	Fund Source Share of Total Activity Funding	Funding Status
CDBG - Urban County		\$25,000	\$12,382	\$12,618		100%	Pending
CDBG - City of Monterey						0%	Applied For ▼
CDBG - City of Salinas						0%	Choose ▼
CDBG - City of Seaside						0%	Choose ▼
Section 108 Loan Guarantee						0%	Choose ▼
ESG						0%	Choose ▼
HOME						0%	Choose ▼
HOPWA						0%	Choose ▼
Other Federal Funds						0%	Contracted ▼
State/Local Funds						0%	Contracted ▼
Private Funds - # of lines needed:	<input type="text"/>						
Other Funds - # of lines needed:	<input type="text"/>						
<b>Total Sources</b>	\$0	\$25,000	\$12,382	\$12,618			

Uses of Funds

Budget Category	Agency-Wide Fiscal Year Expenses for July 1, 2025 to June 30, 2026	Expenses for THIS PROGRAM July 1, 2025 to June 30, 2026	Expenses for Benefit Check-up (BCU)	Expenses for Tax Counseling for the Elderly (TCE)	Program As Share of All Agency Programs	Fund Source Share of Total Activity Funding
<b>Personnel Expenses</b>						
Outreach/BCU Manager		\$0	\$5,712	\$0		
Program Assistant			\$4,284	\$0		
Tax Coordinator			\$0	\$5,525		
Other Staff						
<b>Operational Expenses</b>						
Supplies & Materials		\$0	\$1,800	\$6,293		
Outside Services						
Other Charges						
Capital Outlay						
Other Expenses - # of lines needed:	<input type="text" value="1"/>					
Travel			\$586	\$800		
<b>Total Uses</b>	\$0	\$0	\$12,382	\$12,618		
<b>Costs Per Beneficiary</b>			<b>Total for Benefit Check-up (BCU)</b>	<b>Total for Tax Counseling for the Elderly (TCE)</b>	<b>Total, All Activities</b>	
<b>Unduplicated Beneficiaries</b>			40	275	315	
<b>Cost Per Beneficiary</b>			\$310	\$46	\$79	

8. Please justify the cost per person served.

If you believe there are compelling reasons or extenuating circumstances for a relatively high cost please explain.

For the TCE program, our cost per person served is very reasonable due to the extensive use on volunteers to provide the tax services to clients. BCU cost per is higher due to the more remote nature of the clients and the services must be provided by staff.

You have 1242 characters left.

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PART 5 ORGANIZATIONAL CAPACITY AND EXPERIENCE

1. Please outline your organization's purpose. Include how long the organization has been in operation, mission statement and current business plan, if applicable.

The Alliance on Aging has changed and adapted over 54 years to stay relevant to seniors. MISSION STATEMENT: 'A Community Leader and Advocate, Alliance on Aging provides services and resources that address the challenges and opportunities for older adults in Monterey County'. Our programs include:

- 1. HICAP teaches about Medicare benefits and Medicare plan options.

You have 7 characters left.

2. For all locations where FUNDED activities will be delivered,

please list the locations of the facilities, and days and hours of operation.

Number of Locations:

Address	City	Zip	Days and Hours of Operation
Senior Hub - 236 Monterey Street	Salinas	93901	9am-5pm Mon-Friday. 9am -4pm Saturdays during Tax Season

**APPENDIX 2**

Taylor Farms Center 850 5th Street	Gonzales	93926	9am-1pm Tuesdays
Greenfield Library 315 El Camino	Greenfield	93927	9am-4pm Thursdays (Feb-April minimum)
Marina Library 190 Seaside Circle	Marina	93933	10am-4pm Wednesdays (Feb-April minimum)
Various centers, senior housing, events	throughout County		schedule varies monthly

**3. Describe internal administrative controls to be used, including financial record-keeping procedures and management controls. Upload copy of financial policies.**

The Alliance on Aging Finance Committee reports monthly to the Board of Directors, providing current and year to date reports. The committee also reports quarterly to the Board of Directors on market values and comparative performance data. The Alliance uses standard fund accounting procedures to track revenues and expenditures to programs and the budget. The agency also has an annual independent audit. Claims are filed based on accurate and up-to-date general ledger activity. Our Financial Policies are attached. The

You have 877 characters left.

**4. Describe how your agency will adhere to the procurement provisions under 24 CFR Part 85 or 84. Upload copy of your procurement policies. See <https://www.hud.gov/sites/documents/24CFR85-36PROC.PDF> for more information.**

Alliance on Aging follows the Monterey County Procurement Policy. In addition, the AOA looks for competitive pricing for all supplies and services and uses local vendors, minorities, and women owned businesses whenever feasible. A copy of applicable policy sections has been uploaded.

You have 1216 characters left.

**5. Describe the record-keeping system to be used to maintain program data.**

All client demographic information including income level is gathered in compliance with each program's protocols, and it is always kept confidential and secure, with limited access. Our standards are compliant with HUD standards. For Outreach program, a completed Intake form and service activity is stored in a locked cabinet. Tax Counseling for the Elderly uses IRS approved, online program TaxSlayer to file taxes which includes demographic information and income level.

You have 1022 characters left.

**6. Describe the mechanisms to be used to fulfill responsibilities regarding federal cross-cutting regulations that may apply (e.g. non-discrimination, equal employment opportunities, and other local, state and other federal requirements). If applicable, provide copy of existing administrative and/or program policies.**

The Alliance on Aging fulfills its responsibilities regarding equal employment opportunities and other relevant local, state, and federal requirements by adhering to the Board approved Policies and Procedures Manual which governs all aspects of the workplace environment. All employees are provided with a copy of the manual upon hire and are notified of any interim revisions. The Alliance on Aging's non-discrimination and grievance policy is posted in all our offices at wheelchair level. In addition, program

You have 303 characters left.

**7. Describe the capacity of your organization to carry out the proposed activity, including the ability to quantify and measure results. You should include previous federal grants management, fiscal staff resources, skills and experience.**

Executive Director John McPherson joined agency July 2023. He is responsible for acquisition, management, execution of all seven AOA programs including grant/contract compliance; Hub programs and consignment store. He is also responsible for all aspects of fundraising to assure AOA sustainability. Prior history includes Executive Director positions at two educational and one advocacy nonprofit, served on the Monterey County Board of Education since 2012 and has been a leading advocate in the fight against human

You have 2 characters left.

**8. Describe your existing or proposed collaborative efforts for addressing Program/Project need. Please include names of all partnerships and define the roles and responsibilities of these partners. If you have no collaborative partners, explain how you propose to coordinate your services with other community agencies in order to leverage resources.**

The AOA has built strong collaborations & partnerships. Our Outreach staff are members of SCORE (South County Outreach & Educ. Cmte.) and collaborate with many other organizations. Current partners in our Outreach include SVMH/Taylor Farms Family Health & Wellness Center (Gonzales), Legal Services for Seniors, Meals on Wheels of the Salinas Valley, and the Independent Transportation Network. They joined us at the clinic and at other venues/opportunities in South County. In partnership with ITN and TAMC we have

You have 92 characters left.

**9. The right to fund the proposed project is at the funders' discretion. Be advised that your project may be based on funding availability and be partially funded. Please explain how your organization would be able to adapt the proposed activity should your organization receive less than requested funding. Please also explain how the provision of CDBG funds will serve to increase the level of service above and beyond what would be possible without the use of CDBG funds.**

The AOA plans to use the CDBG funds to expand services in North and South County and unincorporated areas. The funds would only be used to pay staff time and travel costs. The funds will help support bilingual/bicultural Spanish speaking staff, who work at the Taylor Farm clinic one day/ week and provide outreach services to seniors throughout the community. The Gonzales clinic is a service "hub" for South County's older adults, looking for health and wellness services. The clinic has expanded and has room for other services. AOA's services compliment the Clinic's Wellness Model. For example, we schedule Medicare counseling appointments on site. Family members using the clinic would have access to our information and resources. A regular presence improves our visibility and encourages more volunteer participation. Volunteers are vital to our provision of services.

A reduction in funding would force us to limit the services we could provide to both North and South County. We could not have a

You have 57 characters left.

**10. Please list previous grants/awards received by your Agency for Public Services, Infrastructure, or Affordable Housing Programs from the Urban County**

Program Year	Project	Amount Funded Monterey County
FY 2024-2025	BCU/HICAP	\$10,000
FY 2023-2024	BCU/HICAP	\$22,250
FY 2022-2023	BCU/HICAP	\$20,025
FY 2021-2022	BCU/HICAP	\$6,593
FY 2020-2021	BCU/HICAP	\$2,286
FY 2019-2020		
FY 2018-2019		

**11. Prior Grants for this program from the Urban County (autofilled from your history)**

Program Year	Project	Amount Funded Monterey County
FY 2024-2025		
FY 2023-2024		
FY 2022-2023		
FY 2021-2022		

**APPENDIX 2**

23 <input type="checkbox"/> Employee Handbook - Date Adopted or Last Reviewed Sept 2023	Already on file
24 <input type="checkbox"/> Record Retention Policies - Date Adopted or Last Reviewed 2020	Already on file
25 <input type="checkbox"/> Federal Tax Form 990	Already on file
26 <input type="checkbox"/> State Tax Form 199	Already on file
27 <input type="checkbox"/> Rental/Lease Agreement (if applicable)	Already on file
28 <input type="checkbox"/> Cost Allocation Plan - Federal Agency Approving Plan: - Date Approved: 7/15/2010	Already on file
29 <input type="checkbox"/> Other	N/A
30 <input type="checkbox"/> Other	N/A
31 <input type="checkbox"/> Other	N/A
32 <input checked="" type="checkbox"/> Monterey County Vendor Record - Download at <a href="#">this document</a> , complete it, and upload to this item.	
33 <input checked="" type="checkbox"/> CA Form 590 (CA Residents) - Download at <a href="#">CA Form 590</a> . OR CA Form 587 (Non-Resident) - Download <a href="#">CA Form 587</a> . complete the appropriate form, and upload to this item.	
34 <input type="checkbox"/> Fidelity Bonding Documentation	
35 <input checked="" type="checkbox"/> Worker's Compensation Insurance	

[Click here to go to the Upload Documents page](#) (Your application will be saved)

*If these documents cannot be uploaded due to unforeseen events, contact the City or County Housing Division Planning Manager for approval to submit hard copies. Approval is rarely given, but if it is, they must be delivered to the Housing Division no later than the application due date.*

Report Submitted by: Tamara McKee    Date: 01/17/2025

Click above to return report to Draft status, and please enter a reason in the box below

**Accepted by:**

xyz

Initially submitted: Jan 17, 2025 - 13:01:50

**APPENDIX 2**

FY 2020-2021	
FY 2019-2020	
FY 2018-2019	

**12. Please list previous grants/awards received from other County of Monterey Sources**

Program Year	Project	Department	County Contact	Amount Funded Monterey County
FY 2024-2025				
FY 2023-2024				
FY 2022-2023				
FY 2021-2022				
FY 2020-2021	Outreach Services		Outreach Services	\$0
FY 2019-2020	Outreach Services		Outreach Services	\$0
FY 2018-2019	Outreach Services		Outreach	\$0

**13. Describe your past experience with grants from Monterey County.**

If there were performance issues, please describe the steps you have taken to correct them

In 2020, for the first time, we applied for a Monterey County CDBG grant. We received an allocation of \$18,000 however we never billed or used it. The funding was to support the position which we didn't fill because of COVID. We were able to begin services in April of 2021. We have continued to do individual outreach as well as remote services to the older adults in South County with our existing Outreach Staff. We focus on face-to-face communications, especially in the Latino community. During pandemic, Outreach staff made

You have 103 characters left.

**14. As required by the Federal Office of Management and Budget (OMB) and HUD,**

describe how the overall project budget is cost effective and reasonable for the anticipated result.

The overall project budget of \$25,000 is cost effective and reasonable for the following reasons:

- The Alliance on Aging is a nonprofit agency and, as such, does not focus on making a profit from the services it provides, including the Outreach program, Tax Counseling for the Elderly nor the Health Insurance Counseling and Advocacy Program (Medicare Counseling).
- The funding supports the Outreach and Tax Staff that represent all the AOA programs and the other senior service providers.

You have 534 characters left.

[Save and Continue](#)

**Attachments**

All Attachments should be in pdf form AND start with the number it is being attached for. Check each line item that you will attach. Attachments must be uploaded. If you believe the attachment is not relevant to your program, please explain.

Attachment	Link or Explanation for Missing Attachments
1 <input checked="" type="checkbox"/> HUD Agency Certification - Download <a href="#">this document</a> , complete it, and upload to this item.	<a href="#">HUD_agency_cert_2025.pdf</a>
2 <input type="checkbox"/> Federal and State Tax Exemption Determination Letters/Non-Profit Certification (e.g., IRS 501C (3) Letter)	Already on file
3 <input type="checkbox"/> Articles of Incorporation/Bylaws - Date Adopted or Last Reviewed	Already on file
4 <input checked="" type="checkbox"/> Certificate of Good Standing with the State ( <a href="https://bizfileonline.sos.ca.gov/">https://bizfileonline.sos.ca.gov/</a> )	
5 <input checked="" type="checkbox"/> Organizational Chart	
6 <input checked="" type="checkbox"/> List of Current Board Members [with titles, contact data (i.e., telephone, email, address) and current terms] - Board President Position Expires: 12/31/2025 - Secretary Position Expires: 12/31/2025	
7 <input checked="" type="checkbox"/> Resumes of Program Administrator and Fiscal Officer	
8 <input checked="" type="checkbox"/> Evidence of Insurance (Liability, Auto) - Coverage Period: 6/30/24 - 6/30/25	
9 <input checked="" type="checkbox"/> Audited Annual Financial Statements covering 2 Years	
10 <input checked="" type="checkbox"/> Signed Authorization to Request Funds (usually Executive Director or Board of Directors)	
11 <input checked="" type="checkbox"/> Designation of Authorized Officials (usually Executive Director or Board of Directors)	
12 <input type="checkbox"/> Conflict of Interest Policy - Date Adopted or Last Reviewed 2/2/2015	Already on file
13 <input checked="" type="checkbox"/> Project Team Experience and Qualifications	
14 <input checked="" type="checkbox"/> Project/Activity Timeline	
15 <input type="checkbox"/> Financial Policies - Date Adopted or Last Reviewed 12/2024	Already on file
16 <input type="checkbox"/> Procurement Policies - Date Adopted or Last Reviewed 1/15/2008	Already on file
17 <input checked="" type="checkbox"/> Eligibility Intake Forms or Data Collection Tools (which should include Race and Ethnicity data fields as required by The Federal Office of Management and Budget (OMB))	
18 <input checked="" type="checkbox"/> Project/Activity Support Letters	
19 <input checked="" type="checkbox"/> Program Evaluations	
20 <input checked="" type="checkbox"/> Outreach Materials	
21 <input type="checkbox"/> Evidence of Project Support/Community Outreach (written endorsements, when available)	as shown above in #18
22 <input type="checkbox"/> Limited English Proficiency (LEP) plan and/or equal access (Section 504) plan. See <a href="#">HUD FAQs on LEP</a> and <a href="#">HUD information on Section 504 for sub-grantees</a>	Already on file