

City of Salinas

FEC Academy Phase 1 Milestone and Grantee Proposal

City of Salinas

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Application Form

Question Group

Please complete the Phase 1 Milestone and Grantee Proposal below to be eligible to advance to FEC Academy Phase 2 and become a FEC planning grantee. For assistance on completing this form, please refer to the materials hosted on the FEC Planning Platform and attend the weekly FEC Office Hours.

This form must be completed by a local government entity.

Upon approval of the Phase 1 Milestone and Grantee Proposal, the local government partner will receive a \$20,000 planning grant and more in-depth technical assistance to support the submission of a FEC Implementation Proposal and the successful launch of a FEC.

FEC Locality*

City or county.

City of Salinas

Statement of Interest and Local Government Support

Question 1*

How is financial counseling, and specifically launching a Financial Empowerment Center, relevant to the city or county's priorities and efforts to assist low-income residents?

Financial counseling and the establishment of a Financial Empowerment Center (FEC) align with Salinas' strategic priorities to enhance economic mobility, reduce poverty, and foster financial stability among its residents. According to data from the United Way Monterey County (UWMC) and regional assessments, over 40,000 households in Monterey County cannot afford their basic needs, with a significant portion residing in Salinas. Launching an FEC will address systemic barriers such as limited access to affordable credit, high levels of debt, and financial literacy gaps.

The FEC model complements existing initiatives, such as the city's affordable housing programs, job creation efforts, and partnerships with organizations like UWMC and the Monterey County Business Council. By providing one-on-one financial counseling and integrating services into broader economic development programs, the FEC will empower residents to increase their savings, reduce debt, and achieve long-term financial stability. Services will be hosted at the United Way Monterey County Community Impact Center, providing a centralized, accessible hub for financial counseling and related resources.

Financial counseling and the establishment of a Financial Empowerment Center (FEC) are directly aligned with the City of Salinas' and Monterey County's strategic priorities to enhance economic mobility, reduce poverty, and foster financial stability among residents.

The City of Salinas' 2022-2025 Strategic Plan emphasizes the importance of pursuing housing options for residents of all income levels, including the unsheltered, that are safe and secure. Additionally, the City's Violence Reduction Strategy focuses on prevention, intervention, enforcement, and reentry, aiming to create a safe environment for people to achieve their potential.

Monterey County's strategic initiatives include enhancing the well-being and prosperity of residents through economic development, improving health and quality of life via health and human services, and creating safe communities through public safety efforts.

By providing one-on-one financial counseling and integrating services into broader economic development programs, the FEC will empower residents to increase their savings, reduce debt, and achieve long-term financial stability. Services will be hosted at the United Way Monterey County Community Impact Center, providing a centralized, accessible hub for financial counseling and related resources.

Question 2*

Who are the individual local government decision-makers who need to be engaged during the planning process, and how will each decision-maker be engaged?

1. City Manager's Office (José A. Arreola, Assistant to the City Manager):
 - o Role: Oversee the planning process, engage stakeholders, and secure administrative support.
 - o Engagement: Regular meetings and progress updates.
2. Salinas City Council:
 - o Role: Approve budget allocations and provide legislative backing.
 - o Engagement: Workshops and presentations to align FEC objectives with council priorities.
3. Monterey County Department of Social Services:
 - o Role: Integrate county resources with FEC services.
 - o Engagement: Coordination meetings and data sharing agreements.
4. Economic Development Department:
 - o Role: Align FEC with workforce development initiatives.
 - o Engagement: Joint strategy sessions to incorporate financial counseling into entrepreneurship programs.

Question 3*

Attach a letter of support from the locality's chief executive stating their commitment to the development of the FEC model and designating specific staff members to manage its execution.

The letter can be addressed to Fernanda Villaseñor, Principal, CFE Fund, 44 Wall Street, Suite 1050, New York, NY 10005.

FEC Letter of Support Jan 2025.pdf

The attached letter is from Rene Mendez the City Manager for the City of Salinas

Financial Empowerment Landscape

Landscape Analysis Upload*

Complete and upload your Landscape Analysis Stakeholder Map. Include at least 15 names/organizations.

Salinas Landscape Analysis Stakeholder Map.xlsx

Question 4*

Describe past and current financial empowerment programs offered by the local government directly or in partnership with others.

The City of Salinas has implemented several financial empowerment programs, both independently and in collaboration with various organizations, to support its residents:

- VITA (Volunteer Income Tax Assistance) Program: In partnership with UWMC, offering free tax preparation services that helped residents secure millions in tax refunds.
- Smart Referral Network (SRN): Facilitates closed-loop referrals to over 90 local organizations for financial and social services.
- Housing Navigation Services: Programs addressing housing affordability and stability, integrated with financial counseling efforts.
- Community Development Block Grant (CDBG) Programs: The City administers CDBG funds to support housing rehabilitation, public services, and economic development activities aimed at benefiting low- and moderate-income residents.
- Emergency Solutions Grants (ESG) Program: ESG funds are utilized to provide services such as street outreach, emergency shelter, homelessness prevention, and rapid re-housing assistance to individuals and families experiencing homelessness or at risk of becoming homeless.
- Affordable Housing Initiatives: The City has been supporting the development of affordable housing for more than five decades, facilitating the creation of housing options for residents of all income levels.
 - Rental Registry and Rent Stabilization Ordinance: In October of 2024 the City Council enacted a rental registry and rent stabilization ordinance to help keep rental costs from rising too quickly.

Question 5*

Identify non-governmental organizations doing or leading financial empowerment work in the locality and the type of work they are providing (e.g., financial education, one-on-one financial counseling and coaching, workshops, VITA programs, Bank On coalitions, etc.).

1. United Way Monterey County (UWMC):
 - o Comprehensive Services: UWMC leads financial literacy and empowerment programs throughout Monterey County, including hosting workshops, managing the Volunteer Income Tax Assistance (VITA) program, and supporting housing stability initiatives. The organization is a key partner in creating systemic change to address financial barriers for residents.
 - o Financial Literacy Workshops: These workshops, offered in English and Spanish, teach critical topics such as budgeting, debt management, credit repair, and long-term savings. UWMC uses HUD-certified counselors to ensure participants gain practical and actionable financial skills.
 - o VITA Program: UWMC provides free tax preparation services to low-income households, helping them secure essential refunds and credits like the Earned Income Tax Credit (EITC). This program returned millions of dollars to the community last year, directly impacting financial stability for participants.
 - o Housing Stability Support: UWMC offers services such as rental assistance and connects clients with other programs to prevent homelessness. Through collaborations with the Smart Referral Network, they ensure that clients can access comprehensive resources tailored to their needs.
 - o Community Impact Center: The planned Financial Empowerment Center will be housed here, providing centralized, accessible support for financial literacy and counseling services, fostering a one-stop solution for residents seeking financial stability.
2. Monterey County Business Council:
 - o Small Business Support: This organization provides entrepreneurial training, small business advisory services, and access to resources for aspiring and current business owners. Their efforts focus on fostering economic growth in sectors like healthcare, hospitality, and precision manufacturing.
3. Goodwill Central Coast:

- o Career Development Programs: Goodwill helps low-income residents with job training, skill-building, and employment placement. These services empower individuals to gain stable employment and improve their financial prospects.
- 4. Community Foundation for Monterey County:
 - o Grant Administration and Philanthropy: This foundation manages charitable funds, provides grants to nonprofits, and promotes financial empowerment initiatives across the region. Their focus includes capacity building for local organizations and supporting systemic approaches to financial stability.
- 5. Salvation Army, Salinas Corps:
 - o Emergency Financial Assistance: The Salvation Army provides essential services such as rental assistance, utility bill payment support, and food services. These programs address immediate financial crises and help residents avoid further hardship.
- 6. Housing Resource Center of Monterey County:
 - o Housing Assistance: This organization provides critical support to prevent eviction and homelessness. Their programs include rental assistance, security deposit aid, and foreclosure prevention counseling to promote housing stability.
- 7. Catholic Charities of Monterey:
 - o Multi-Faceted Financial Support: Catholic Charities offers a wide range of services, including financial literacy education, rental assistance, utility payment support, and other emergency relief. Their programs focus on empowering vulnerable populations, including undocumented residents.
- 8. Bright Beginnings and Mujeres en Acción:
 - o Empowerment Programs: These organizations focus on holistic support for families and individuals, offering financial counseling and connecting residents to childcare resources, workforce development, and health services through partnerships with UWMC and other entities.

Question 6*

Describe any current or planned city- or county-wide initiatives that could be aligned with financial counseling and into which financial counseling could be integrated (e.g., affordable housing, rent and utilities assistance, entrepreneurship programs, etc.)

Several city and county-wide initiatives in Salinas and Monterey County are aligned with the goals of financial counseling and present opportunities for integration into broader programs:

1. Affordable Housing and Homelessness Prevention Programs:
 - o The City of Salinas administers several initiatives through Community Development Block Grants (CDBG) and Emergency Solutions Grants (ESG) to address housing affordability and prevent homelessness. Financial counseling can complement these efforts by helping residents build savings, navigate rental assistance programs, and manage housing costs effectively. The SHARE Center, a 24-hour navigation hub, already supports these goals and can expand with financial counseling services.
2. Rent and Utilities Assistance Programs:
 - o As part of pandemic recovery efforts, both Salinas and Monterey County have expanded assistance for rent and utilities to prevent evictions. Financial counseling can equip residents with budgeting skills to sustain long-term housing stability, preventing repeat financial crises.
3. Entrepreneurship Support through Monterey County Business Council:
 - o The county's focus on fostering entrepreneurship in key sectors like healthcare, hospitality, and climate resilience aligns with financial counseling services. Small business owners and aspiring entrepreneurs can benefit from tailored financial education on budgeting, managing business finances, and accessing microloans.
4. Family Self-Sufficiency (FSS) Programs:
 - o Local housing authorities and nonprofits offer FSS programs to help low-income residents achieve financial independence. Integrating financial counseling can amplify these programs by providing tools for credit repair, savings growth, and long-term financial planning.
5. Youth and Family Financial Education through United Way Monterey County (UWMC):

- o UWMC leads financial literacy workshops targeting youth, families, and single mothers, aligning with county goals to reduce generational poverty. These workshops focus on practical skills like creating budgets, understanding credit, and planning for education expenses.
- 6. Economic Mobility and Workforce Development Programs:
 - o The county's partnership with Goodwill Central Coast and the Monterey Bay Economic Partnership includes job training and workforce development initiatives. Financial counseling can be integrated to help participants manage their earnings effectively and avoid predatory lending practices.
- 7. Health and Human Services Initiatives:
 - o Programs aimed at improving access to healthcare can include financial counseling to help residents understand medical billing, manage healthcare expenses, and enroll in benefit programs.
- 8. Smart Referral Network (SRN):
 - o Managed by UWMC, the SRN connects residents to over 90 community-based services. Adding financial counseling to this closed-loop referral system ensures holistic support for clients seeking economic stability. By integrating financial counseling into these initiatives, the City of Salinas and Monterey County can create a unified framework that addresses the root causes of financial instability while empowering residents to achieve long-term self-sufficiency.

Stakeholder Discussions

Question 7*

Have an introductory meeting with one non-profit organization that you are considering as a potential programmatic partner. *(This can be an informal, 30 minute meeting)*. List the name of the organization, titles of the staff members you met with, and respond to the following questions for each organization:

- Were they interested in potentially partnering with the FEC? Why or why not?
- What insights did they offer on how financial counseling could benefit their clients?
- How would this partnership support the local government's financial empowerment goals?
- Please describe any other highlights from the conversation or noteworthy insights about the potential partnership.

Meeting Summary:

- Organization: United Way Monterey County (UWMC)
- Attendees:
 - o José A. Arreola, Assistant to the City Manager, City of Salinas
 - o Lynn Foden, Director of Financial Stability, UWMC

Insights from Meeting:

1. Interest in Partnership:
 - o United Way Monterey County expressed strong interest in partnering with the Financial Empowerment Center (FEC). They identified financial counseling as a natural extension of their existing programs and an opportunity to deepen their impact within the community.
2. Potential Benefits for Clients:
 - o UWMC emphasized how financial counseling could enhance the success of their current initiatives, including the Volunteer Income Tax Assistance (VITA) program and Smart Referral Network. They highlighted that many clients they serve lack access to personalized financial planning resources and would benefit from one-on-one financial counseling to manage debt, improve credit, and build savings.
3. Alignment with Local Government Goals:
 - o UWMC identified the FEC as a strategic asset to advancing Salinas' goals of economic mobility and financial stability. They noted that co-locating services at the United Way Community Impact Center would create a centralized hub for residents, streamlining access to vital resources.

4. FEC Location and Integration:

o The FEC could be housed at the United Way Monterey County Community Impact Center, a central and accessible location in Salinas. This hub will streamline service delivery by integrating financial counseling with other programs already offered at the center, such as VITA, housing navigation, and referrals through the Smart Referral Network.

o The center's infrastructure supports hybrid service models, offering both in-person and virtual financial counseling sessions to ensure flexibility and reach for diverse client needs.

5. Capacity for Hiring and Training Counselors:

o UWMC has experience recruiting and onboarding certified financial counselors and is prepared to scale their efforts to meet the needs of the FEC.

6. Commitment to Equity and Accessibility:

o The organization is dedicated to providing culturally relevant services, particularly for Spanish-speaking and immigrant populations.

Question 8*

Have an introductory meeting with one governmental agency that provides social services or works directly with constituents and who may serve as a program partner to refer clients to the FEC. *(This can be an informal, 30-minute meeting).* Examples include Health and Human Services, Neighborhood Services, Treasurer's office, Utility billing, etc. List the name of the agency, title(s) of the staff member(s) you met with, and respond to the following questions:

- Were they interested in potentially partnering with the FEC? Why or why not?
- What insights did they offer on how financial counseling could benefit their clients?
- How would this partnership support the local government's financial empowerment goals?
- Please describe any other highlights from the conversation or noteworthy insights about the potential partnership.

City Manager Rene Mendez has identified developing Financial Empowerment program through this fund as priority and has asked the Community Development Director to assign the Economic Development Manager Michael Gomez to support the program. We have a shared clientele group in the residents of Salinas. The intra-governmental Partnership would allow us the bandwidth necessary to maintain relationships with our partners, then design and launch the program. The economic development manager provides a different set of local contacts and relationships in the business sector that will strongly compliment my existing relationships in the not-for-profit sector.

Question 9

If you have had any discussions with potential financial counseling providers, please list the names of the organizations here and briefly describe their qualifications, as well as any conversations had. The financial counseling provider is the contracted organization that will hire and manage counselors to deliver services. Reminder: the CFE Fund will need to approve all financial counseling providers through the Implementation Proposal using CFE Fund's criteria.

United Way Monterey County (UWMC) is a strong candidate to serve as the financial counseling provider for the FEC. With an established track record of managing financial empowerment programs, UWMC has the resources and infrastructure needed to hire and manage counselors effectively. UWMC's qualifications include:

- Experience in Financial Literacy Programs:

- o UWMC has successfully conducted financial literacy workshops in English and Spanish, covering essential topics such as budgeting, credit repair, debt management, and savings growth. These workshops are led by HUD-certified counselors and tailored to meet the needs of diverse communities in Monterey County.
- Management of the VITA Program:
 - o UWMC oversees the Volunteer Income Tax Assistance (VITA) program, which has helped thousands of residents secure millions of dollars in tax refunds. This program demonstrates UWMC's ability to coordinate large-scale, impactful financial services.
- Integration with Existing Community Networks:
 - o Through its management of the Smart Referral Network, UWMC facilitates seamless referrals between over 90 partner organizations. This infrastructure positions UWMC to integrate financial counseling into a broader network of community support services.
- Proven Administrative Capacity:
 - o UWMC has a history of effectively managing grants and contracts, including those supporting financial empowerment initiatives. Their administrative expertise ensures compliance with funding requirements and efficient program delivery.
- 1. Capacity for Hiring and Training Counselors:
 - o UWMC has experience recruiting and onboarding certified financial counselors and is prepared to scale their efforts to meet the needs of the FEC.
- 2. Commitment to Equity and Accessibility:
 - o The organization is dedicated to providing culturally relevant services, particularly for Spanish-speaking and immigrant populations.
- 3. Alignment with FEC Goals:
 - o UWMC sees the FEC as an opportunity to centralize and enhance financial empowerment efforts, leveraging their Community Impact Center as the physical and operational hub for services. This alignment of expertise, infrastructure, and mission makes UWMC an ideal partner to serve as the financial counseling provider for the FEC.

Question 10*

THIS QUESTION IS NO LONGER VISIBLE TO RESPONDENTS (REPLACED BY LANDSCAPE ANALYSIS) Provide a list of stakeholders who will be invited to participate in the Advisory Group (include specific individuals, titles, and organizations). Please note that Advisory Group invitations should not be issued until your Phase 1 milestone is approved and this list has been reviewed with your CFE Technical Assistance lead.

Question 11*

THIS QUESTION IS NO LONGER VISIBLE TO RESPONDENTS (REPLACED BY LANDSCAPE ANALYSIS) What are your goals for the Advisory Group and your approach to engaging them in the planning process. Include specific examples of expertise and/or resources you wish to receive from the Advisory Group. If you have ideas about subcommittees or working groups, describe your thinking.

Planning Capacity

Question 10*

Identify the City/County staff member(s) who will serve as the CFE Fund liaison(s) for the remainder of FEC Academy and be responsible for grant deliverables, including brief biographies, any past experience with financial empowerment/anti-poverty efforts and partnerships, and role within the local administration.

- Please note that at least one staff member must be senior enough to engage senior administration officials and stakeholders to secure buy-in and must also be able to commit a significant amount of time to manage these efforts. Having the capacity to dedicate significant time to the FEC planning efforts is key to a successful development of the FEC Implementation Proposal.

Jose Arreola, Assistant to the City Manager

José Arreola is the Assistant to the City Manager for the City of Salinas and Director of the Community Alliance for Safety and Peace (CASP). CASP is a cross sector Collective Impact organization focused on preventing and eliminating violence in Salinas and throughout Monterey County. He graduated from San José State University with a B.S. in Recreation and Leisure Studies and a minor in Mexican American Studies. He served as the City of Salinas Liaison to President Obama's National Forum on Youth Violence for four years and currently serves on the Board of Directors of the California Violence Prevention Network. In addition, he serves as Chair of the Monterey County's Juvenile Justice Commission. José is the lead for the City of Salinas Governing for Race Equity community and staff steering committee and their representative in the Towards a Racially Equitable Monterey County (TREM) regional collaborative. José has completed four years of training in the Government Alliance on Race Equity by Race Forward. He has led the development and implementation of three strategic plans on violence prevention. Preventing violence and improving equity are key elements to reducing poverty.

Michael Gomez, Economic Development Manager

Michael Gomez was born and raised in Salinas giving him a rich cultural knowledge of the City and its residents. Michael is an experienced professional in Human Resources, Economic Development, and Property Management. He has the knowledge and experience to guide his clients through City processes if needed. Michael holds a B.A. degree in Collaborative Health and Human Services from the University of Monterey Bay. Michael has helped develop and deliver small business development programs in our Community Development Department.

Question 11*

Describe your plans to utilize the \$20,000 planning grant to work towards submitting a successful FEC Implementation proposal. Grant funds may be used for staff commitments, managing administrative needs, hiring a consultant, funding a local site visit, and/or other activities relevant to the FEC planning process.

We would like to fund a local site visit, offset personal cost for our non-profit partner United Way and potentially hire a consultant to support the advisory group.

Proposed Budget*

Upload a proposed budget using the first tab of the following budget template.

Salinas FEC Planning Grant Budget 2025.xlsx

Fundraising

Question 12*

Describe all public and private funding secured to date to support the development of the FEC. Note the type of funding, amount, and term for each funding source.

Funding has not yet been secured. See #13.

Question 13*

If funding has not been secured to support the development of the FEC, describe any efforts to date to secure funding, including the general fundraising strategy, potential funders to engage with, and specific sources of public funding, including federal funding, being sought.

The City of Salinas, with support from United Way Monterey County (UWMC), is committed to building a robust and diversified funding strategy for the Financial Empowerment Center (FEC). While funding has not yet been secured, the following proactive efforts and plans illustrate a collaborative approach to establishing financial sustainability for the initiative:

1. City-Led Efforts:
 - o The City of Salinas is taking the lead in identifying federal funding opportunities, such as Community Development Block Grants (CDBG), Emergency Solutions Grants (ESG), and other HUD-related funding streams. These sources align with the city's strategic priorities to enhance economic stability for low-income residents.
2. Partnership with UWMC:
 - o UWMC is committed to supporting the city by providing technical expertise and leveraging its existing relationships with philanthropic organizations, such as the Community Foundation for Monterey County. While these partnerships are still in the exploratory phase, they demonstrate the potential to secure private grants aimed at financial literacy and empowerment.
3. Collaborative Public-Private Partnerships:
 - o Both the city and UWMC are exploring partnerships with local financial institutions, including credit unions and banks, to sponsor specific FEC programs. These partnerships would provide essential funding for initiatives like counselor training and financial literacy workshops, while also building long-term collaboration opportunities.
4. Highlighting Existing Successes:
 - o Programs like VITA and the Smart Referral Network, managed by UWMC, are being used as case studies in grant proposals to showcase a proven track record of community impact. These examples strengthen the credibility of funding applications.
5. Prospecting and Outreach:
 - o The city and UWMC are engaging with private foundations, corporate donors, and high-net-worth individuals to raise awareness about the FEC's objectives. Stakeholder meetings and community forums are planned to cultivate interest and secure commitments.
6. Leveraging the United Way Community Impact Center:
 - o The FEC will be hosted at the United Way Monterey County Community Impact Center, providing a cost-effective and centralized hub for financial counseling services. This strategic location appeals to funders by maximizing resource. By aligning city leadership with UWMC's expertise, the Financial Empowerment Center's funding strategy emphasizes a collaborative and sustainable approach to building financial empowerment in the region.

Notes for TA Lead

Question 14

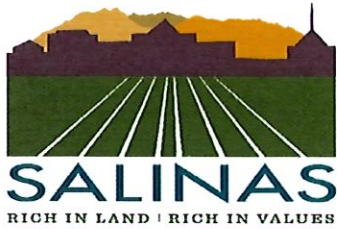
Do you have anything you want to share with your TA Lead before meeting? While your assigned TA Lead will work with you through all aspects of FEC planning, we understand that you may have specific concerns, challenges, or questions to highlight. Please list anything you would like for your TA to know before meeting.

If needed guidance on developing working relationships with local banks.

File Attachment Summary

Applicant File Uploads

- FEC Letter of Support Jan 2025.pdf
- Salinas Landscape Analysis Stakeholder Map.xlsx
- Salinas FEC Planning Grant Budget 2025.xlsx



City of Salinas

OFFICE OF THE CITY MANAGER • 200 Lincoln Ave • Salinas, California 93901

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January 14, 2025

Cities for Financial Empowerment Fund
44 Wall St., Suite 1050
New York, NY 10005

Dear CEF Proposal Review Team,

I am writing to express the City of Salinas' strong support for our participation in the Cities for Financial Empowerment Fund program and to submit our City's Phase 1 Milestone and Grantee Proposal for consideration. We are excited about the opportunity to move forward to the Financial Empowerment Cities (FEC) Academy Phase 2 and ultimately become a Financial Empowerment Cities planning grantee.

Salinas is committed to building financial security for our residents, particularly those in underserved communities. Our participation in the FEC initiative represents an important step toward creating a comprehensive financial empowerment strategy for our city. We believe that by joining the FEC Academy, we will gain the necessary resources and technical assistance to develop an actionable plan that will have a meaningful impact on our community.

Upon approval of our Phase 1 Milestone and Grantee Proposal, the City of Salinas is excited to receive the \$20,000 planning grant and further in-depth technical support. We are confident that these resources will be instrumental in advancing our local financial empowerment initiatives. Through the FEC program, we aim to improve financial literacy, increase access to financial services, and empower our residents to achieve long-term financial stability.

We look forward to the opportunity to work closely with the Cities for Financial Empowerment Fund team and other cities in the FEC network to make Salinas a leader in advancing financial empowerment at the local level.

Thank you for your consideration of our proposal. We are excited about the potential for this collaboration and the positive change it will bring to our community.

Sincerely,

Rene Mendez, City Manager
City of Salinas
(831) 758-7465
renem@ci.salinas.ca.us

Stakeholder Information - At least 15 stakeholders required for

In this section, list key stakeholders that may have an interest in financial empowerment work in your community at the city/state/local level, non-profits, financial institutions, libraries, funders, private sector, and academic institutions. See the Definitions tab for examples of each stakeholder type.

Stakeholder Information				
Organization Name	Type	Stakeholder Name	Stakeholder Title	Email (optional)
United Way Monterey County	Program Partner - Nonprofit	Lynn Foden	Community Impact Director of Financial Stability	lynn.foden@unitedwaymcca.org
Salinas Mayor	Local Government - Senior Leadership	Dennis Donahue	Mayor	
Monterey Bay Federal	Potential Financial Counseling Provider (FCP)	Carrie L. Birkhofer	President & CEO	
VITA Coordinator	Program Partner - Potential Financial Counseling Provider (FCP)	Tax Prep Coordinator	Tax Prep Coordinator	
Santa Cruz Community Ventures	Program Partner - Potential Financial Counseling Provider (FCP)	Maria Cadenas	Executive Director	
small business development corporation	Program Partner - Nonprofit	Roger Gilbert	SBDC Program Director	
sparkpoint	Program Partner - Nonprofit			
Monterey County Business Council	Potential Financial Counseling Provider (FCP)	Paul Farmer	Chief Executive Officer	
Goodwill Central Coast	Program Partner - Nonprofit	Thomas Moran	President and CEO	
Community Foundation for Monterey County	Funder	Dan Baldwin	President & CEO	
Salvation Army, Salinas Corps	Program Partner - Nonprofit	Lt. Ezequial Hernandez	Executive Director	
Housing Resource Center of Monterey County	Program Partner - Local Government	Alexa Johnson	Executive Director	
Catholic Charities of Monterey County	Potential Financial Counseling Provider (FCP)	Angela Di Novella	Executive Director	
Bright Beginnings of Monterey County	Program Partner - Nonprofit	Sonja Ko		
City Manager, City of Salinas	Local Government - Senior Leadership	Rene Mendez	City Manager	

WesCom Credit Union	Financial Institution		
Monterey Credit Union	Financial Institution		
Bright Futures of Monterey County	Program Partner - Nonprofit	Jackie Cruz	Vice President
Hartnell College	Program Partner - Local Government	Michael Gutierrez	President

<p>for Milestone</p> <p>r community. This can include government partners any other organizations that might touch financial akeholder type.</p>		<p>Stakeholder Map - Optional for Milestone</p> <p>For each stakeholder, consider on a scale from 1-10 (1 is low) the level of engagement they will have in your FEC planning process as well as their level of influence over key FEC decisions. These will automatically populate the chart in the following sheet "Stakeholder Map"</p>	
		Stakeholder Map	
Existing Relationship with Local Government?	Key Programs, Initiatives and Priorities	Level of Engagement	Level of Influence
Yes	SPARK, VITA	10	8
Yes		2	8
No		7	2
Yes	VITA	6	7
Yes	ALAS, Reimagining Our Safety Nets	7	6
Yes	Free one on one business counseling	5	6
Yes	economic self sufficiency	8	8
Yes	Free one on one business counseling	7	8
Yes	Financial Literacy Services	5	5
Yes	Grants for organizational development and neighborhood grants	5	9
Yes	food pantries and meal programs	5	5
Yes	Family Stabilization Program	3	6
Yes	emergency rental assistance	7	7
Yes	early childhood	6	8
Yes		7	10

No		2	7
No		2	7
	cradel to career pathways	6	8
	post secondary access and pathways	8	8

Site Visit Stakeholder Meeting - Optional for Milestone

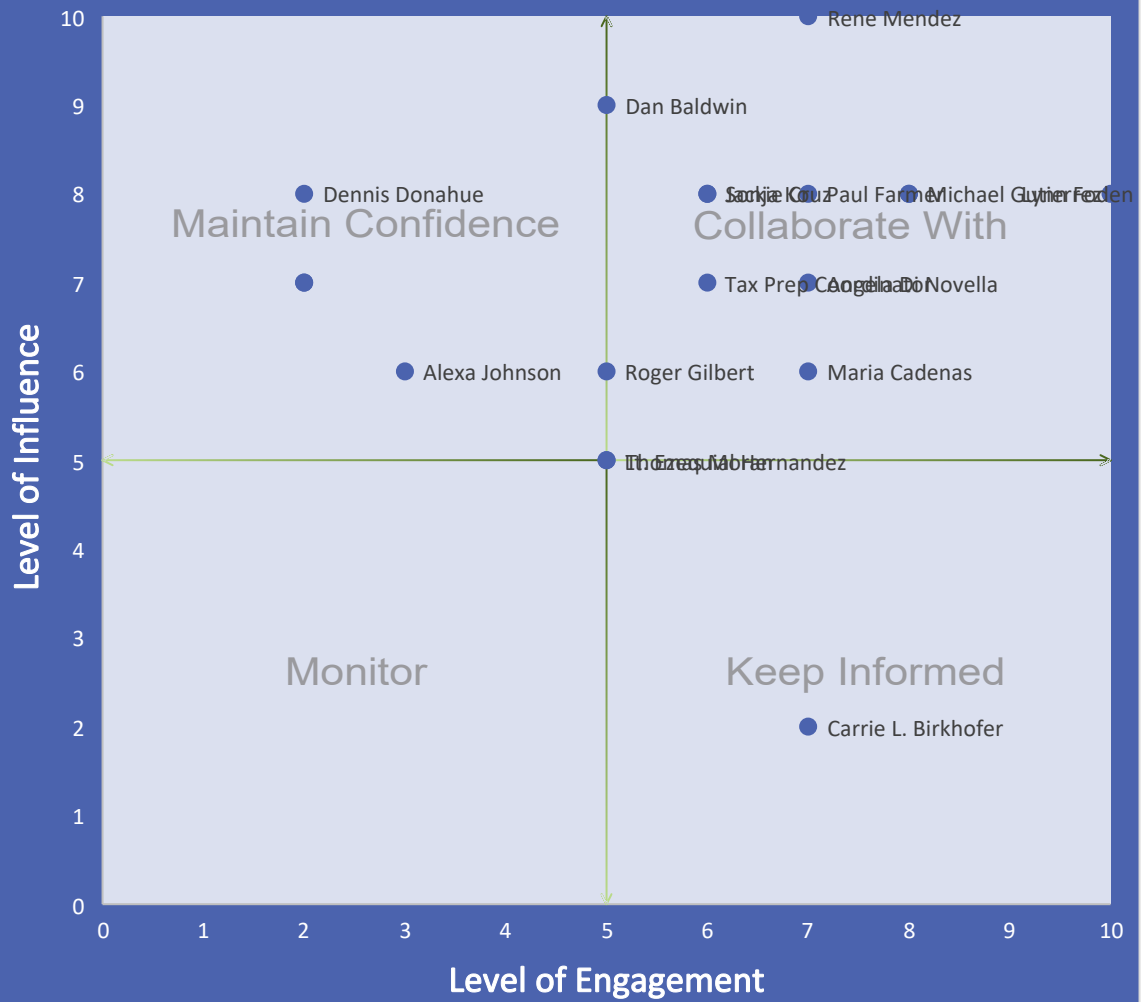
Consider how you might engage this organization or individual during the CFE site visit. See the Definitions tab for types of stakeholder meetings. Do not issue any invitations until you have had discussions with your CFE TA lead.

Stakeholder Meeting		
Stakeholder Meeting Type	Invite sent?	RSVP received?

Individual Meetings	Yes	Yes
Individual Meetings	No	Yes
Funders Roundtable	No	No
Advisory Group	No	N/A
Advisory Group	No	N/A
Individual Meetings	No	N/A
Stakeholder Meeting	No	N/A
Stakeholder Meeting	No	N/A
Advisory Group	No	N/A
Funders Roundtable	No	N/A
Stakeholder Meeting	No	N/A
Advisory Group	No	N/A
Stakeholder Meeting	No	N/A
Advisory Group	No	N/A
Individual Meetings	Yes	Yes

Funders Roundtable	No	N/A
Funders Roundtable	No	N/A
Stakeholder Meeting	No	N/A
Stakeholder Meeting	No	N/A

Stakeholder Map



Stakeholder Categories

Funder

Program Partner - Nonprofit

Program Partner - Local

Government

Financial Institution

Potential Financial Counseling

Provider (FCP)

Local Government - Senior

Leadership

Local Government - Other

Other

Stakeholder Meeting Types

Advisory Group

Stakeholder Meeting

Individual Meetings

Funders Roundtable

Definitions

Organizations that could provide public or private funding for your FEC

NGO agencies or programs that would be interested in partnering with a FEC to offer financial counseling to their clients and/or that would help your FEC reach priority populations.

Government agencies or programs that would be interested in partnering with a FEC to offer financial counseling to their clients and/or that would help your FEC reach priority populations.

Organizations that offer financial products or services that may be of interest to clients. Fi

Organizations that have experience with financial empowerment programming or direct client services that may be interested in becoming the FEC Financial Counseling Provider (i.e. the organization hiring counselors)

Decision makers that are needed to launch and sustain the program.

Local government offices or agencies that are important to administrative functions of the planning and implementation process.

Definitions

The FEC Advisory Group consists of 15-25 individuals representing diverse stakeholder groups and will provide input on your FEC planning process including operations, program partnerships, fundraising, and marketing.

Stakeholder meetings are stand alone meetings for different stakeholder groups. These meetings are helpful if you want to make sure individuals are aware of FEC planning but don't necessarily need to be as involved as your Advisory Group.

Individual meetings are best when you have specific questions or issues that need to be discussed with an individual or small group or when an individual's position is best suited for an individual meeting.

A Funders Roundtable is an opportunity to bring together potential funders, and share an introduction to the FEC with a specific lens for funders.

Examples

Community Foundations, Corporate Foundations, United Ways, Banks, Credit Unions, CDBG office, Local Government Housing Repair, Homeownership, Reentry organizations, Small Business support organizations, Multi-service agencies, Workforce development, Legal Aid, Utility offices, Refugee/Immigrant services, Neighborhood organizations, etc.

Property Tax programs, Housing Authority, Public Benefits agencies, Municipal Court, etc.

Banks, Credit Unions, CDFI, small dollar loan programs, programs with IDA accounts

Organizations that offer free tax prep, housing counseling, financial education workshop, or credit/savings program

Mayor/County Executive, Councilmembers, Deputy Mayor Department head

Budget office, Fiscal/Legal, Procurement, Council members, Department leadership

Considerations

Select individuals who you feel will be beneficial to have more deeply engaged in the planning process and who have the time to dedicate to 2-3 meetings during the planning period.

Examples of stakeholder meetings include meeting with Agency Department Heads or Local Government Senior Leaders, meeting with Nonprofit Program Partners, or hosting a Funders Roundtable.

Examples of individual meetings including meeting with the Mayor, County Executive, and/or Chief of Staff to brief them on the FEC, meeting with the Procurement and Legal teams about specific questions related to RFPs and contracting, or meeting with the CDBG department to get buy-in for FEC funding.

This group can be a mix of financial institutions, foundations, or corporate donors. Engage funders as you would an advisory group. Not only do they have insights into local needs, but it will make funders feel more engaged in the planning process. This type of meeting is most beneficial if your community has a diverse mix of funders and it isn't possible to include them all in the Advisory Group.

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Stakeholder Type	Stakeholder Meeting Type	Invite Options	RSVP Option
Funder	Advisory Group	Yes	Yes
Financial Institution	Stakeholder Meeting	No	No
Potential Financial Counseling Provider (FCP)	Individual Meetings	N/A	Maybe
Program Partner - Local Government	Funders Roundtable	Other	N/A
Program Partner - Nonprofit			Other
Local Government - Senior Leadership			
Local Government - Other			
Other			

Chart Axis

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FEC Planning Grant Proposed Budget

City/County Name:

Note: You may adjust line items as necessary. At the end of the grant term you will fill out the Budget v. Actuals (second tab in this spreadsheet) documenting how grant funds were spent
If approved for the FEC Implementation Grant, any funds not spent down from the FEC Planning Grant may be carried over to the FEC Implementation Grant

Category	Projected Expenses	Notes
Personnel and Fringe	\$4,000	Offset personal cost for our internal and partner personal
Indirect/Admin	\$2,000	indirect administrative cost
Consultant(s)	\$9,000	Paid consultant support
Meetings/Events	\$5,000	Cost to convene meetings and a trip to see a model FEC in a similar City as Salinas.
Supplies		
TOTAL	\$20,000.00	

FEC Planning Grant Budget vs. Actuals

City/County Name: 0

Note: you may adjust line items as necessary. Grantee will be required to submit a financial report detailing how the FEC Planning Grant funds were spent at the end of the grant term.

Category	Projected Expenses		Actual Expenditures	Notes
Personnel and Fringe	\$	4,000.00		
Indirect/Admin	\$	2,000.00		
Consultant(s)	\$	9,000.00		
Meetings/Events	\$	5,000.00		
Supplies	\$	-		
TOTAL	\$	20,000.00	\$ -	