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- Response to Federal Evaluation 04/29/1971,

Vol. I (6 of 7)

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AREA: Santa Clara County (San Jose)

DATE: April 6, 1971

CONTACT: Robert Squaglia, Executive Director, and staff

PROBLEM: Technical assistance needed in fund raising and in alternate funding sources.

DISCUSSION: Potential use of the ice and roller rink idea for raising some funds for a summer youth program.

Potential employment opportunities at the ice rinks, roller rinks, bowling alleys, etc., for low-income and minority group youth with adjunct of fund raising.

Distribution of fliers through the schools will promote closer ties with education, private business rescurces, and more extensive promotion of local CAA programs.

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NEEDS: Additional funds and time to get current programs underway.

State resources mobilization from SEOO as the need arises.

RECOMMENDATIONS:

The ice rink idea be tried to raise funds for youth programs. Mr. Neil Rose of the Sun Valley Ice Rink will contact Bob for negotiations on the fliers, funds to be provided. SEOO will try to arrange a meeting with the under-leadership of the CAP and the ice rink representative. The CAP should arrange for distribution of the fliers through the school district superintendent.

ACTION: SEOO is to contact ice rink officials and coordinate additional meetings.

BOARD CHAIRMAN:

Name: Richard Rios

Address: 841 The Alameda

San Jose, California 95110

Telephone: (408) 298-3977

AREA: Monterey County (Salinas)

DATE: April 7, 1971

NTACT: John Mathis, Executive Director, and staff

PROBLEM: Pre-training in grantsmanship was needed in line with

presentation by ATAC (American Technical Assistance Corporation).

SCUSSION: Each staff member outlined his area of responsibility and the

problems being faced in his particular programs.

Presentation was made on basic management functions of planning, organization, staffing, direction, control, follow-up as concerns CAA work programs: how to develop a grant and its basic components, how a budget is organized, executed and administered. General comments on how to utilize banks for additional local share and technical services, as well as better use of area colleges.

NEEDS: Special technical assistance in fiscal controls (Charles Blaker has been alerted to arrange for such services).

Special assistance in Housing (Bob France alerted to needs; will make arrangements as soon as practical).

Additional management technical assistance to the Director and particular members of the staff.

ECOMMENDATIONS:

The area colleges should provide some specific services in other than the social sciences. A future meeting between SFOO and the colleges will be arranged under leadership from the CAP. Emphasis should be placed upon CAP staff enrolling in the Management-Supervision programs, or basic administration programs to gain necessary administrative skills.

ACTION: Technical assistance in management given. Future meetings with colleges to be arranged.

DARD CHAIRMAN:

NAME: Reverend H. H. Lusk

ADDRESS: #6 West Gabilan Street

P. O. Box 1087

Salinas, California 93901

TELEPHONE: (408) 424-0091

AREA: Santa Cruz

DATE: April 8, 1971

CONTACT: Richard Brown, Executive Director, and staff members

PROBLEM: Completing the CAP Form 81 and organizing the work programs for the next grant year.

[편] - 영화 - 사용화학 시시시시시시 회사 회사회 기계 112 대신 회사 12 대신 제 12 대신 회사 12 대신 회사 12 대신 제 12 대신 회사 12 대신 제 12 대신 회사 12 대신 제 12

DISCUSSION: SEOO provided a concise outline of the planning, organization, staffing, direction control and follow-up necessary to develop a CAP 81 and CAP 7 as well as in the administration of a program.

SEOO outlined a basic function of the CAA budget including how it is organized, executed, and controled, and funds transferred from among program accounts and within a program account. Emphasis was also placed on the category of "special funds" from sources and revenues not provided for in the guidelines. An outline of what the banks can and should do for local share was also provided.

NEEDS: 1. Funds to expand most program needs.

- Housing, funds and programs to build more units in Watsonville.
- 3. Problems of conflict between what CAP can and should do and community demands upon the CAA.
- 4. Training program on grantsmanship.
- 5. Transportation problems in the county.

6. Senior citizens need more program funds and centers.

RECOMMENDATIONS:

For increased local share and new funding sources, the CAP should shop around among the various banks to see which will give the most services in return for the deposits being made. Such service should include, at least, free checking, low interest loans or grants to the credit union, free salary check issuance and record-keeping, free fiscal and auditing advice and service, and free meeting space.

Recommendations were also made on the procedures for completing the CAP Form 81 and CAP Form 7.

ACTION:

Return to CAP for specific training with the CAP Director on issues of authority and responsibility, and community resources mobilization. CAP was advised to send a representative to the technical assistance conference in Sacramento.

BOARD CHAIRMAN:

Name: Dr. Bill Zachmeier

. Address: 701 Ocean

Santa Cruz, California 95060

Telephone: (408) 426-3140

Area: Contact: Rio Hondo (Los Angeles County) Salvador Velasquez

Problems:

Rio Hondo CAP has been having problems in its administrative management, internal fiscal controls, program evaluation services, and grant management procedures. These are being remedied by direct assistance from Pat Marwick and Mitchell. Additionally they have a great need for alternate funding sources, and employment resources. No special problems with the SEOO or other CAP agencies.

Discussion:

- Elimination of weak projects; CAP not disagreeing with State position, if State sincere.
- 2. No real problem with State Office because they have been left alone without outside interference.
- 3. Semi-annual evaluations would be cooperated with if instituted.
- 4. ATAC has been helpful to them, training conference okay.

Needs:

Immediate need of technical management and management systems assistance is being resolved.

Need for alternate funding resources is pressing.
The CAP Versatile grant is not sufficient to fund a strong enough administrative core to operate all of the CAP programs. Number and cost of staff in relation to total funding is small and less then most comparable CAP's.

Recommendations:

- 1. A strong Inter-CAP technical assistance program be organized for the Los Angeles outlying area with funds available from the SEOO for travel and per di
- More funds for outlying and rural CAPs that do not have other financial resources as Model Cities, HUD, CEP, HEW, etc.
- 3. Direct technical assistance on alternate funding applications and resources especially to develop business enterprises.
- 4. Need for State conferences on varieties of technical assistance available to CAPs.

Impressions:

The community support, and provision of offices, equipment and cooperation in program development for Rio Hondo is high. Although the CAP has had internal managment problems that are now being adequately resolved, its community external support is excellent.

AREA: Santa Cruz (CCCDC)

DATE: Thursday - March 18, 1971

CONTACT: Alfred Navarro, Executive Director

PROBLEM: Establishment of Economic Development Corporation/Co-op Campesina, financial program.

DISCUSSION: 1. Accounting System and Internal Controls.

2. Financial statements and reports.

1. Financial policies to assure proper management in accordance with basic management standards and OEO requirements. The appropriate policy-making body should review regularly the operations and activities of the grantee, including its financial position and operations, to ascertain that its affairs are properly administered. The appropriate policy-making body remains ultimately responsible for the proper administration of the grantee's

 Establish a strong accounting system/adequate system of internal control.

financial position and operations.

3. Effective financial reporting.

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4. A comprehensive independent audit and continuing professional financial counsel on major problems.

RECOMMENDATIONS/ACTIONS:

NEEDS:

- 1. Direct cooperation and meetings between SEOO and OEO.
- 2. Continuous evaluation and monitoring.
- 3. Request SEOO technical assistance without hesitation.

CB:vb

AREA: Santa Cruz

DATE: Wednesday - Thursday, March 17-18, 1971

CONTACT: Merrill Morton, Fiscal Officer

PROBLEMS: Technical Assistance - Fiscal Management Area

DISCUSSION: 1. Fiscal 1

1. Fiscal Management
Financial Reports
Budget
Internal Controls
Accounting System

 Direct cooperation, meetings and technical assistance between SEOO, OEO and CAA.

 Periodical evaluation of CAA - Fiscal Management System.

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NEEDS:

- 1. No back-up in the Fiscal Section. Staffing Fiscal Officer and Account Clerk. Additional help needed in the preparation and maintaining of payroll.
- 2. Contract between CAA and Certified Public Accountant firm.
- 3. In-put of Finance Officer in preparation of budget.
- 4. Grantee Monthly Financial Report, CAP Form 15. Report in the arrears since November 1970.
- 5. Internal controls in fiscal management area lacking in certain areas. Division of employees' duties and control of blank checks.

RECOMMENDATIONS/ACTIONS:

- 1. Recommend that CAP consider using a Work Study student to assist in the preparation of the payroll. The need could be satisfied by a student working 48 hours per month.
- Contract for CPA firm should be executed for the protection of both parties.
- It is essential for the Fiscal Officer to participate in the grantees program development and budget.

- 4. At month end the grantee statement of financial operations showing budgetary comparisons should be carefully reviewed. Any line items where expenditures appear to be progressing at a rate likely to exhaust monies too quickly should be carefully examined and the cause determined. (CAP Form 15).
- 5. Establish a division of employee duties and responsibilities that will result in a strong internal control. The separation of the operating employee duties (acquisition, custody and disposition of assets) from accounting employees' duties of recording and posting transactions is the basis of strong internal control.
- 6. CAP memo 23A requires reference checks be made on all new employees. The major reason for this is to establish the prior salary. This is not being accomplished. The Fiscal Officer has been requested by the Executive Director to accomplish this task. In my opinion this task should be performed by the Personnel Committee and in turn referred to the CAA Board for final selection approval.

CB:vb

CB:vb

AREA: Quechan Nation, Ft. Yuma, California

DATE: March 18 and 19, 1971

CONTACT: Fritz E. Brown, President, Quechan Tribal Council

Felix J. Montague, Colorado River Planning Area

Frank J. Kinale, Manpower Development & Training Consultant

PROBLEM: 1. Indians have claims to former tribal lands that they have tried to have restored to them.

- 2. They are developing a master economic development plan which is contingent upon restoration of tribal lands.
- 3. There are problems with squatters who are settling the disputed areas along the Colorado River.
- 4. The Indians have failed to receive effective action on their behalf from State agencies assisting them with land and economic development problems.
- 5. Indians have not been trained to operate whatever businesses are being developed on the reservation or to operate agricultural developments on the reservation. Although cooperation is increasing with the Bureau of Land Management and the Bureau of Indian Affairs, it is not as good as it could be.

DISCUSSION:

We discussed the roll of technical assistance to the Indian nation, and that this consists of legal services, management services, economic development ideas, organizational assistance in the development of jobs, advice on contractural matters, direct assistance in contacting State agencies and getting State agency assistance, coordination with the Department of Human Resources Development, a desire to make the Indian nation self-sufficient with minimum reliance on the outside community, and a desire by our office to enhance the rapport and respect between the Indian nation and the Arizona and California communities.

NEEDS:

The reservation needs to have its land restored prior to economic development and before such time as the land becomes so valuable as to make land restoration almost impossible. They have a need for better quality onsite education and educational facilities. They have a need for stronger and more comprehensive HRD services on the reservation; they need economic and career development programs that will bring youth back to the reservation and keep them in touch with cultural ties and families, yet progressing the reservation to self-sufficient economic development.

More in-depth business and employment development and training services from both Federal and State agencies as well as the support of local political leaders to achieve these goals.

Need transportation system on the reservation that is self-supporting.

They need to have control over their own police facilities and law enforcement services on the reservation. They need technical administration and management assistance to coordinate ideas presented to them and operational efficiency.

COMMENDATIONS:

Recommend the ranch redesign its land planning proposal with more emphasis on recreational outdoor employment. rather than Indian indoor employment. This would include the development on a large scale of the Indian reservation as a "Palm Springs of the Colorado River Basin" with emphasis on such things as winter resort and winter recreation development.

The following are examples of the kind of recreational facilities feasible on the reservation:

l. Develop high quality sand mining and to sell the sand to the Department of Parks and Recreation and that the reservation contact Mr. William Penn Mott to negotiate this kind of program.

2. Excess land from sand mining be filled in with water and a forebay reservoir or small lake be created in which boating, canoeing, sailing and swimming, and other aquatic sports can take place.

Adjacent to such a development should be a full-time residential area for both recreational and retirement people especially in view of the no tax policy on reservation land.

Such development should be both operated, administered and controlled by the tribal council and Indian residents of the reservation.

Provide corporations such as the McCulloch Corporation, Hughes AirWest Corporation, Southern Pacific or Georgia Pacific, or others with a perspective of the potential for such recreation development and encourage them to make investments in this area on the reservation with the stipulation that the Indians would receive a percentage of the profit in perpetuity and be trained to take over all facets of the administration of such operations, thus developing career opportunities for young and old alike.

Reservation should consider setting aside some lands as a wildlife refuge to be opened for hunting during the season to bring in sportsmen from all over the nation. That such an area also be reforested with conifers and deciduous trees that would thrive in the desert climate. Game animals that can survive should be introduced to the area.

A youth investment program be developed by picking left-over crops and selling them competively in the Yuma-El Centro-Mexican markets, with the funds going for the youth center and youth center and youth organizational development.

In addition, the youth could develop and operate such facilities as resident camping, go-carts, mini-bike trails, miniature golf courses, etc.

The reservation should consider the development of an 18-hole championship golf course with accompanying clubhouse and seek private resources for such a development.

In cooperation with Safeway or other large markets in California, develop an on-site supermarket especially in view of the no sales tax policy on reservations, which would make prices competitive to those in Yuma. Added to this would be surplus farm commodities grown on the reservation as part of the inventory of the market.

Indians should be trained to farm the land they are now leasing.

Development of their own agricultural resources.

Because of the large gravel hills, it is suggested they develop skills in gravel mining and cement production and develop contracts with the Division of Highways as soon as possible for the impending freeway construction going through the reservation.

On the freeway interchanges that are located on the reservation, it is suggested the Quechan Tribal Council negotiate a contract which will allow the Indians to have a percentage of the income from such businesses and be trained to administer and operate businesses as part of employment and career development.

ACTION: Our office will seek to assist revervation in developing an immediate contract for the use of gravel that is now located on the reservation.

Seek to help them develop a market for sand now located on the reservation.

ACTION (continued)

Seek to develop a resource for the supermarket and other commercial development on the reservation.

Seek to assist in securing private corporation financial and construction development for both recreation and resident facilities on the reservation.

Seek to get State support the for Indian tribal land claims that are now being processed.

Arca: Date:

Tulare County (Visalia) Wednesday, January 13, 1971

Nat Unikel Contact:

Problems:

CAP asserted its organization and functioning problems are minimal. Desire more alternate funding sources and assistance from State in locating such sources. SEOO fails to contact CAP before coming into area, operates guietly. behind the scenes then appears before Board of Supervisors to provide advocacy to create CAP under Board of Supervisors in accord with Green Amendments -- prefers to have this out in the open.

Discussion:

- Elimination of weak projects, CAP not 1. disagreeing with State position, if State sincere.
- Development of a San Joaquin Valley Inter-CAP Assistance Unit so that each CAP with like problems would be able to assist one another to further serve the interests of the poor, area-wide.
- No real problem with State office because they have been left alone without outside interference.
- Semi-annual evaluations would be cooperated with if instituted.
- ATAC has been helpful to them, training 5. conference okay.

Needs:

Alternate funding. 1.

2.

More general contact. Mobiliziation of State resources, education, HRD, Department of Agriculture, etc. on behalf of CAP.

Recommendations:

- Provide a staff person with responsibility for locating alternate funding sources, knowing application requirements, and assist CAP in securing such funding.
- Develop a San Joaquin area conference for or of CAP administrators to assist in solving their internal and external regional problems.
- Dr. Bob Rothschild, my old boss at the Contra Costa County Department of Education, sends his greetings.

Area: Date:

rea:

Fresno

Wednesday, January 13, 1971 Jim Williams, Dick Price

Problems:

Contact:

No continuity of Field Representatives in Federal or State so that working relationships and confidence can be achieved. Inadequate follow-through on State and Federal representative's recommendations, program objectives, or evaluations. Sometimes, no communications on these areas. Application decision should be concurrent with Regional sign-off so that State veto is not last minute. Equal distribution of all communications and technical assistance, grant materials to rural as well as urban CAP's. San Joaquin area economic development is poor.

Discussion:

- 1. Assistance in elimination of weak projects.
- 2. San Joaquin inter-CAP assistance program.
- 3. Semi-annual evaluations.
- 4. More contact with State supervisors of programs in addition to representatives.
- 5. More direct assistance from State with mobilizing educational, State office, and other such resources.

Needs:

- 1. With mechanization should come plan for what to do with people displaced by such progress before the machine is used in production.
- More housing and job development assistance to balance the Valley economy.
- 3. Help with placement of poor in new IRS facility.
- 4. Constructive assistance from State office, help in implementing ideas of recommendations.

Recommendations:

- 1. Assist with IRS employment program.
- 2. Get universities to develop program and plans for providing the needs of those displaced by mechanization in agriculture.
- 3. Get university and State college economics to work more closely with CAP's where such educational facilities exist.

AREA: Merced

DATE: March 10, 11 and 12, 1971

CONTACT: Richard Flint, Executive Director

Harriet Leves, Program Chairman

PROBLEM: CAA short handed. Beyond program year end; operating on continuance budget with no clear date of refunding.

DISCUSSION:

NEEDS: CAA requested general assistance with:

- Training in program planning and development for Program Committee members and staff.
- 2. Direct assistance to lay multi-social group in preparation of application for HUD Community Facility Center.

3. Orientation and training to Economic Development.

RECOMMENDATIONS:

ACTION: 1. Determine availability of State architect (free).

- Write proposal.
- 3. Train neighborhood committee in proposal writing by involvement in (2) above.
- 4. Train new Economic Development Director in field.

YOARD CHAIRMAN:

.Name: Leo Giobetti

Address: 2870 Evelyn Court, Merced, California 95403

Phone Number: (209) 723-4565



Office of Economic Opportunity

DEPARTMENT OF HUMAN RESOURCES DEVELOPMENT 800 CAPITOL MALL, SACRAMENTO 95814 916 445-9670 OR 445-7011

February 1, 1971

Mr. Paul O'Rourke Training Chief U.S. Internal Revenue Service 450 Golden Gate Avenue San Francisco, California

Dear Paul:

Our office is seeking to assist the Fresno Community Action Agency in placing low income and minority group peoples into your new IRS facility in that area.

I would appreciate it if you could personally contact Mr. Richard Heath, Executive Director at the EOC, Main Post Office, Room 328, Fresno, California 93721, and assure him of maximum assistance in the training and placement of such persons from his area.

Our office views the placement of low income peoples as vital to minimizing the welfare rolls and maximizing the progress of low income peoples as contributing members of our community.

Your personal assistance will be appreciated.

Sincerely yours,
Your old student and colleague

Barny Schur

STAP/Assistant to the Director

BS:plg

cc: Mr. Richard Heath, Fresno CAA

P.S. Are you still teaching at Golden Gate? I am now at Diablo Valley College in the evenings.

Area:

Madera

Date: Contact:

Thursday, January 14, 1971 Pat Vogel and Ron Manfrede

Problems:

No employment. Insufficient funds to cover travel in rural areas. No real chances for upward mobility in CAP, county is tight in hiring qualifications for CAP supervision positions. State assistance has been meager but helpful. ATAC has been helpful. NAB's and HRD help on bottling company (Madera Glass Company).

Discussion:

- 1. Elimination of weak projects within CAP's.
- 2. Mobilization of State resources.
- 3. More personal contact within CAP's in Valley.
- 4. More mobilization of experts within colleges in the areas.
- 5. The CAP does not have a junior college or other educational training program in conjunction with work experience in the anti-poverty program.
- 6. Future meeting with County Manager.

Needs:

- Contact with NAB's to assure issuance of the Job 70 contract for 117 of 190 positions with Madera Glass Company.
- 2. Contact with San Francisco Regional DOL representative to assure issuance of Jobs 70 contract.
- 3. Contact with company personnel manager to stress importance of hiring of low income people by the Madera Glass Company.
- 4. Housing assistance is needed self-help, etc.

Recommendations:

- We do all we can to assure the Jobs 70 contract with NAB's and the hiring of low income people with Madera Glass Company.
- Mobilize educational resources in the area to assist the CAP.
- 3. Get HRD to send a part-time employment counselor and pre-employment training representative to Madera.
- 4. Send in Housing Technical Assistant.

ACTION ITEM: Send letter to Madera Glass, DOL and NAB's stressing Governor's interest in the hiring of low income people in the Madera Glass Company project.

TO: William Blue

Manager-Controller

Madera Glass Company

Avenue 13

Madera, California

Ralph Sager NAB's AREA: Ventura County CAC

DATE: March 23, 1971

CONTACT: Thomas O'Brien, Executive Director

maintained by the grantee.

Mercedes Robertson, Comptroller Thomas O. Mahon, County Auditor

PROBLEMS:

Evaluate the accounting system and internal controls.

Determine technical assistance needs - Fiscal

Management area. Provide direct technical assistance
Fiscal Management area.

DISCUSSION:

A general review and an evaluation of the grantee's accounting system and internal controls was conducted at this time. The review included basic grant document organizational structure, operating procedures, audit reports and various financial records. Mr. Pete Petersen, Community Program Analyst, SEOO participated in discussions held with responsible staff personnel. An exit conference was held with the grantee's Deputy Director and Comptroller on March 23, 1971.

The control of the Ventura County anti-poverty program

by the Board of Supervisors involves the control of grantee's funds by the County Auditor. The grantee maintains expenditure records with the objective of providing the necessary data for financial reporting purposes. These expenditure records are reconciled monthly to the County's cash disbursement records. This system provides the grantee adequate reporting information but it involves some unnecessary accounting activity and a substantial amount of duplication of effort already available in the County's accounting system. The information required for reporting purposes could be readily extracted from the County's records through modification of the County's system of accounting for OEO funds. Thus, eliminating the need for the essentially duplicative system

The need to establish a property accounting and control system was discussed. The grantee has never established property records and controls over accountable property purchased with grant funds, donated as in-kind contributions, or acquired as GSA excess, as required by CAP Guide, Volume V. The Comptroller and Assistant are currently attempting to develop an adequate property accounting and control system and grant property is being marked with identifying symbols to show origin and/or ownership. The inadequacy of property records and controls was noted in independent audit reports for Program Years "A" through "D".

The grantee's control over vehicle use was considered inadequate. In my opinion, adequate vehicle utilization records for the two motor vehicles assigned were not being maintained. The daily log showing speedometer readings, user of vehicle, and purpose of use was incomplete in that there were significant gaps in speedometer reading postings. A new daily log format was discussed.

The grantee's control over telephone use was considered inadequate. The grantee does not maintain adequate telephone call records. As a result, evidence to show that telephone calls for only grant purposes by authorized persons is not available.

Documentation of the Legal Aid Program "In-kind" contributions are appro imately \$18,000 in the arrears for PY "E" ending March 31, 1971. Only \$5,500 of the non-federal contributions share has been documented.

NEEDS:

- 1. Improve property management by establishing (1) an adequate property accounting and control system (2) adequate vehicle utilization records.
- 2. Need to develop an adequate accounting and control system relating to telephone usage.
- 3. Grantee should address themselves to the need for "In-kind" contributions particularly in the Legal Aid program.
- 4. Written procedures for purchasing and property control.
- 5. Policies and procedures with respect to the usage of grant vehicles and telephones be stated in writing in sufficient detail to enable all persons concerned to comply.

RECOMMENDATIONS:

- 1. That this Grantee modify the accounting system to embrace all of the elements of accounting now being performed by the County Auditor and the Grant Accounting Unit. By modifying and/or consolidating the accounting system, greater control and uniformity can be achieved and duplication of efforts eliminated.
- 2. That the Grantee resolve their accountability of property acquired during PY "A" through PY "E" as expeditiously as possible. The amount of property which the Grantee is accountable for is not known at this date.

3. Policies and procedures with respect to purchasing and property control, usage of vehicles and telephones, and documentation of "In-kind" contributions be stated in writing. (Operations Manual/SOP etc.)

Area: Contact: Long Beach Mrs. Elizabeth Moore Carl P. Wallace

Problems:

Long Beach is suffering from unemployment and economic woes resulting not only from the nation's economic slump but also from cut backs in military spending -at-the-Navy Ship-Yard.

State OEO personnel came into Long Beach last year to evaluate the programs, made positive statements, but filed negative reports.

Discussion:

- 1. State position on CAPs is to assist CAAs in eliminating weak projects within a CAP but to provide all the necessary technical assistance to save such projects first. If a project cannot be saved and a CAA is positively committed to a project that is not competent, then SEOO would use its veto power to encourage the CAA to eliminate such weak projects. The CAP would then redistribute funds to stronger programs.
- State would begin to provide funding and program ideas to CAPs.
- Boards should set policy and make decisions on the CAA level with CAP administrators carrying out such policy.
- 4. More leadership should be exercised by Regional OEO and SEOO. More team pre-review and evaluation by Regional OEO and SEOO jointly so they concurrather than conflict on recommendations.

Needs:

Alternate funding specialist.

- 2. State Average Daily Attendance (ADA) reimbursement for CAP special education program for school dropouts.
- 3. More cooperative assistance from Regional and SEOO before problems develop.
- 4. Reconstitute State Advisory Committee to SEOO.
- 5. Develop a California CAA Board Chairman's group for problem solving among CAPs.

Recommendations:

- 1. Hire alternate funding specialist in next grant.
- 2. Send review and evaluation personnel in Regional and SEOO teams with written comments at time they leave CAP and follow-up report to CAP within 3 weeks.
- 3. Develop a technical assistance conference for all CAA Board Chairmen and CAP Directors with position statements by Regional and State OEO that are open.

ACTION:

- 1. Get Regional and State OEO Technical Assistance and Goals Conference going before summer.
- Get State OEO Advisory Committee reconstituted (with outgoing CAA Board Chairmen participating) before April, 1971.

To: Mr. Joe Williams
Executive Director
Economic Opportunities Commission
2309 Tulare Street
Fresno, California 93721

Dole: February 16, 1971

Subject: IRS Employee
Placements

From : Barny Schur STAP/Assistant to the Director

> Attached is a copy of a letter from Mr. Paul O'Rourke of the IRS which I thought you might be interested in.

If you need any additional personal assistance from me on securing placement of the people you are training for the IRS facility, please contact me as soon as possible.

BS:plg

Attachment

Regional Commissioner Internal Revenue Service Western Region

Date:

In raply refer to:

February 10, 1971 Ad:T

Mr. Barny Schur
STAP/Assistant to the Director
Office of Economic Opportunity
Department of Human Resources
Development
800 Capitol Mall
Sacramento, California 95814

Dear Barny:

It was good, indeed, to hear from you. Your letter was timely as it prompted a telephone call from us to the newly appointed Executive Director of the EOC, Fresno, Mr. Joe Williams.

We were able, in our discussion with Mr. Williams, to learn about the EOC's training activities which might produce some future employees for our center. Mr. Williams now has 27 in training; we agreed with him on his plan to emphasize test-taking skills in the training class. Mr. Williams has been in contact with Mr. Claude Torres, Manager of the Fresno HUD Center.

A brief discussion ensued relative to the eventual placement of Economic Opportunity enrollees at the Center. It was brought out that the Center will be an excellent training ground for NYC, STEP, and CEP enrollees in 1972; however, Mr. Williams recognized there was little possibility for such trainee slots this year since the permanent staff won't begin to be employed until the end of 1971.

Mr. Williams was supplied with the names and telephone numbers of our Chief, Administration Division and Personnel Officer at Fresno. He plans to contact them soon. It is well for these gentlemen to become acquainted early in the game, even if no hiring is being done now. I feel our discussion with Mr. Williams was fruitful.

Thanks for contacting me. We will keep in touch.

Sincerely yours,

Paul O'Rourke

Chief, Training & Taxpayer

Education Branch Western Region

AREA: Santa Barbara

ECOMMENDATIONS :

DATE: Wednesday, March 17, 1971

CONTACT: Dr. Norbert McNamara, President

Mr. Roger E. Heroux, Acting Executive Director

PROBLEM: The CAP does not have a permanent director at this time and the acting director does not have the authority to formulate firm administrative procedures.

ફેક્સ જાણા લાલક શું છે, કો સામાં જે કે લોકો એક કો અનુ જો જાણ કરો જાણા કરે જે છે. કે કો કો કો કો કો જો જ

A recent emergency food program was split into several components because of community pressures which puts more funds into administration than food distribution.

The CAP is failing to make maximum potential use of local banks as a financial source.

DISCUSSION: We discussed fund-raising ideas using local bowling allies or skating rinks.

[26] 전 이 사람들은 그를 즐겁지 않는데 요 한 회사 하고 있었다는 중국 사람들이다.

Utilization of local bank with whom the CAP has an account for such things as local share, technical assistance in financial management, meeting room space for executive meetings, contributions to the youth program in lieu of interest balances on the money on deposit, and using the bank as a wedge to open other doors with businesses and industries with whom the bank is doing business that will help with economic development and job development programs.

The emergency food program should be unified under one unit serving the needs of the whole community; in particular, those of the aged.

입사실, 전 나는 경험을 발표하다는 하고 있는 그렇게 된 그렇게 되는 것이 없는 것은 다른 편안 없었다.

NEEDS: CAP needs strong leadership, additional funding sources, increased economic picture that will lead to more jobs, and more innovative ideas for program development.

- 1. In the hiring of a new director, the CAA Board should consider giving preference to people with a strong managerial and educational background as well as administrative.
- 2. Emergency food program be administered directly by the CAP on the inside basis or by a non-controversial community agency that serves total community needs, such as a local church or civic organization.
- 3. The CAP should contact the local bank with whom it has an account and explore possible alternatives in the form of services to be rendered by the bank in exchange for having money on deposit.

COMMENDATIONS (Continued)

4. Monthly salary checks and related journals and ledgers could be administered by the bank. This will relieve pressure on the bookkeeping and accounting procedures.

Dole : April 15, 1971

Subject: Review of Santa Barbara Fiscal Program

Say Schur

ř: >

Please be sure that a note is sent to Santa Barbara concerning our last fiscal review doing the following:

- Noting a correction in our records on fiscal year dates.
- Assuring them in writing that the \$45,000 allegation was discovered to be false by this office.

A prompt response in this area from the TA Section will assure them of our sincerity in helping solve problems in a positive manner.

BS:plg

AREA: Community Action Commission of Santa Barbara County, Inc.

DATE: March 16, 1971

NTACT: Roger E. Heroux, (Acting) Executive Director

PROBLEM: Technical assistance - Fiscal management area.

DISCUSSION/NEED:

Purpose of visit to the CAA was to conduct a general review and an evaluation of the grantee's accounting system and internal controls. The review included basic grant documents, organizational structure, operating procedures, audit reports and various financial records; and we held discussions with responsible financial program individuals.

The accounting system and internal controls of the grantee are considered adequate to safeguard the assets of the grantee, check the accuracy and reliability of accounting data, promote operational efficiency, and encourage adherence to prescribed management policies.

We noted a need to improve financial management by timely submission of the application for grant funds to preclude borrowing of funds from other CAAs. This CAA borrowed \$10,000 on January 22, 1971, and \$25,000 on February 3, 1971 from the Ventura CAA, pending receipt funds for PY "E", grant period November 1, 1971 to October 31, 1971. On March 3, 1971 \$65,000 was made available under PY "E". The funds borrowed have not been repaid to date.

An audit by the Certified Public Accountant (CPA), Mr. E. O. Gieseler, of PY "D" is scheduled for completion by March 31, 1971. The PY "D" audit was discussed with Mr. Gieseler through coordination with the CAA Executive Director. The CPA is currently examining some 76 checks to assure that these expenditures are allowable. These items require additional substantiating information before final determination of validity. I will verify these items on the next visit to this CAA. I found the CPA audit to be quite comprehensive and am convinced that it involved more than the normal amount of time allotted for this type of audit. The only question I had relative to the CPA was the lack of a contract for these services with the CAA. The CPA received a regular fee amount for his services.

The only federal audit of this CAA was made in January 1968 for PY "A". The CAA fiscal officer is required to submit a voluminous monthly financial report, listing every expenditure for the month, to the board members. The February 1971 report contained 20 pages of posted entries and there were 30 Xerox copies made for the board members. We recommended that the CAA board establish a finance committee and the appointed chairman review the financial osition of the CAA and give an oral report to the members based on his examination and verification of monthly expenditures.

There was certain questionable items uncovered in our cursory eview of the CAA financial records, i.e.,

- 1. The expenditure of Economic Opportunity funds totalling \$1,750 to program "Operation Solidarity" was not adequately supported by documentation showing the basis of expenditures or the relationship to the approved program.
- Expenditures of some \$352 involving the use of three buses, to transport individuals to an unauthorized assembly.
- 3. The Assistant Director approved his own "time attendance and wage record" report for November 1970.

4. The executive director approved his own travel (Mileage) for February 1971.

5. Several program component budgets for travel expenses are being overspent based on monthly allotment reports.

The CAA bookkeeper was considered to be thoroughly qualified for the position through OJT received from the CAA fiscal officer. In the more than three years on the job, however, she has not had any formalized training relative to OEO policies, procedures, instructions, etc.

RECOMMENDATIONS/ACTION:

We recommend that:

- The grantee be instructed to implement review procedures to limit disbursement of grant funds to those expenditures which are allowable, authorized and properly supported.
- 2. Establish a finance committee to report to board members.
- The executive director review travel expenses of various program components.
- 4. Provide formalized training where possible.
- 5. Execute contract with CPA firm conducting audit of CAA.

CB: vb:cv

Area: Date:

Bakersfield

Wednesday, January 13, 1971

Contacts:

Ed Taylor, Director
Met with general staff

Problems:

No real problems with State office; however, contacts have been limited and visitations are usually only in conjunction with pre-reviews.

CAP is now in process of consolidating its outreach offices and attempting to make them independent administrative service centers with the central office for overall operations, technical assistance, ideas, and coordination, as well as overall fiscal management.

Discussion:

- Service to CAP by assisting in the elimination of weak projects within the CAP that are not politically feasible in curtailing:
 - a. State would attempt to provide field and technical services to weak projects.
 - b. If project cannot be saved or improved and if CAA Board will not eliminate from funding, State would apply conditional veto to the program to persuade the CAA to eliminate weak, incompetent, or non-function projects.
 - c. CAA would then redistribute these funds to strengthen well-functioning projects within that CAA.

2. Needs:

- a. Alternate funding sources
- b. New program ideas with assistance until the idea is implemented.
- c. Inter-CAP cooperation and Administration-Management assistance.
- d. Quality problem solving conferences especially within the CAP Directors Conference.
- e. More communication with the State as a quarterly newsletter or letter from State Director on issues and positions, goals and directions.
- f. Technical conferences held by State were beneficial and desire more of them.
- g. More youth programs Forestry services assistance.
- h. More help from State office in mobilizing State resources.

Recommendations:

Quarterly memo from State Director to CAP
 Directors discussing problems, issues and setting for State goals, objectives and positions on current issues.

- 2. SEOO to provide direct liaison to State offices for CAP area technical assistance.
- 3. Visits by field representatives for semi-annual evaluations rather than only at pre-review periods.

Page 33--CONCLUSIONS (Charge)

"The majority of CAA executive directors believe the California SEOO has failed to produce results in four major functional areas...(two of which are) mobilization of state resources and coordination of state agencies."

RESPONSE:

See attachments

Page 33--Conclusions (Charge)

"a. The majority of CAA Executive Directors believe the California SEOO has failed to produce results in four major functional areas: ... (3) Advocacy for the poor..."

Response

Before this office can responsibly be an advocate for the poor, we must know what the poor really want and need. Frankly, we are not as impressed by the claims of those who claim to speak for the poor as we are by more objective evidence of what the poor themselves really want. To this end, we commissioned an in-depth study of the opinions and motivations of low-income people inOakland. This has given us some hard data upon which to identify what the poor want.

Furthermore, we have recommended to the Governor the establishment of a substantial task force on "barriers to employment" so that we can identify those statutory, regulatory and other barriers which stand between low-income people and expanded job opportunities.

We have worked up a number of proposals for possible legislative programs to assist disadvantaged people, including, but not limited to, additional suggestions vis-a-vis the Governor's welfare reform program, a drug abuse program, a prison reform program, etc.

In addition, we have consistently encouraged the community action agencies to let us know of any rules, regulations, statutes or other items that stand in the way of achievement of poor people so that we can bring these to the attention of the legislature for its corrective action.

Furthermore, it is interesting to note that our investigations in Santa Cruz, Monterey, Oakland, Sacramento and South Alameda County have all been initiated upon requests from low-income individuals that they were not receiving services that were allowing them to become self-sustaining individuals. It is also interesting to note that the Western Regional Office of Economic Opportunity had been requested by the Monterey County Board of Supervisors, the REDI Corporation and MAPA to initiate such investigation, but they did not respond. If this is not advocating the position of the poor, we fail to see what is. It is also interesting to note the technical assistance that this office has given to community action agencies, even in light of the fact that during the first five months of our new program we were developing a technical assistance team.

State Report

Page 33

Charge

"South Alameda CAP made the following response (See Exhibit NINE) to Question Seventeen: 'SEOO has only come into our community at the request of Republican party members who have become angered at the program or myself. They have only come when something extremely negative is the motivating factor for their being called.'

"In further response to Question Eighteen, South Alameda stated: 'SEOO representatives come to SACEOA with a very prejudiced negative view - when they come - and then they come ill-informed, act rude, apply subtle (they think) pressure to have you run program as they like.'"

Response

On one occasion during 1970, SEOO representatives responded to a request by the President and Board members of a delegate agency of SACEOS for a review and audit. SEOO staff members did not establish the party affiliation of these Board members before responding to said request. In recent months, SEOO has received other requests from members of the SACEOA Board to conduct a full-scale review and evaluation of the agency which would enable the Board to deal with the problems and weaknesses existing within the agency. A report concerning the internal controls of the Head Start program has now been completed and is being submitted to HEW and the SACEOA Board of Directors, with recommendations for improvement. Reports concerning other components will be developed in due time and submitted to the agency with a view of improving the administration and programs of SACEOA. Let us emphasize that these studies by SEOO are the results of requests from Board members of SACEOA, many of whom are low-income representatives.

Page 33

Charge:

"e. The technical assistance delivery system seems grossly ineffective and in some respects non-existent."

Response:

This is a valid criticism, that the delivery system to this point has been grossly inadequate and the SEOO has taken effective measures to correct this deficiency. We have set up a TA ordering desk which will coordinate the Technical assistance services not only of State agencies, but of SDI and ATAC with respect to requests we receive from our field staff and Community Action Agencies.

Charge:

"f. Many of the CAAs feel that the present situation is irreversible, that is, the SEOO has lost all credibility as a constructive force in anti-poverty efforts."

Response:

This charge may have been partially valid during the time of the evaluation; however at this point in time I think this is a specious comment. The situation is not irreversible. At the recent April Resource Mobilization conference, forty CAPS attended out of forty-four, which indicated that Community Action Agencies were desirous of having a better working relationship with the State. During many meetings with Directors and Board Chairmen of Community Action Agencies, it was determined that the State would set down what criteria and expectations it had for effective and streamlined Community Action Agencies, and that a closer working relationship was desirous between the CAAs and the State Office of Economic Opportunity.

SUPPORTIVE FUNCTIONS

1. TRAINING AND TECHNICAL ASSISTANCE:

a. Perception:

- was one of hostility and distrust. Most of those who had dealt directly with the California SECO expressed some form of extreme irritation toward that office. This feeling was expressed by CAA Executive Directors as they related their frustrations "at being investigated rather than assisted." Phil Wing of Pasadena Committee on Human Need and Opportunity (PCHNO) said the state was interested in doing a "weed out" and that the state was not "sincere". CAA Board Chairmen were confused as to the real responsibilities of the SECO and usually were surprised to realize the scope of SECO responsibilities, due to the non-performance of those functions. Neighborhood council chairmen and members usually were totally unaware of the SECO and its Training and Technical Assistance responsibilities to local and regional programs. Elected officials and their representatives were equally unaware of the appropriate Training and Technical Assistance role of the SECO.
- (2) According to most persons interviewed, the California SEOO provides little training and technical assistance to the CAAs in California. Instead, under the shelter of that term, it uses available opportunities to "investigate" CAA efforts and programs. It seems to the CAAs that the SEOO does not recognize training and technical assistance as a priority function of the SEOO, but rather sees its prime responsibility as that of "bird dogging" CAA fiscal and program activities. In response to questions dealing with the training and technical assistance function, 69% of the CAAs responding felt that the SEOO was not performing specific tasks relating to this function. Furthermore, 77% of the CAAs felt the SEOO was doing poorly in this area (See Tabulation Section).
- b. Findings: CAAs feel a constant threat from the SEOO and, instead of welcoming the assistance of a helping hand when needed, the local CAA would often rather avoid proffered assistance -- even at the risk of becoming less effective in order to avoid contact with what was referred to by some as "the enemy."
- c. Conclusions: The relationship between the SEOO and the CAAs is not healthy. Little or no communication exists between the SEOO and CAAs relative to available training and technical assistance resources and how to procure them. Communications have deteriorated so completely and trust has become so non-existent that reconstruction of the training and technical assistance role may be beyond reach.

Page 34 - SUPPORTIVE FUNCTIONS - 1. c. (Charge)

Conclusions: The relationship between the SEOO and the CAAs is not healthy. Little or no communication exists between the SEOO and CAAs relative to available training and technical assistance resources and how to procure them. Communications have deteriorated so completely and trust has become so non-existent that reconstruction of the training and technical assistance role may be beyond reach.

RESPONSE:

Admittedly, up until the Resource Mobilization Conference of April 1971, the relationship between SEOO and the CAAs was not a healthy one and a large gap of communication existed at that time. However, the conclusion of the Federal evaluators that the technical assistance role may be beyond reach is not only invalid, but shows the errors of judgment that they have made throughout the report and the lack of perceptiveness that they have demonstrated in making very subjective conclusions in this report. This is sustained not only by the letters which are attached from all the CAP Directors who enjoyed this last Resource Mobilization Conference, but, in particular, the statements that they have made relative to the new era of relations that now exist between the CAPs. It should be pointed out that if the Federal evaluators were wrong in this major conclusion of the report that the balance of their conclusions in this report should also be suspect. The relationship between CAAs and SEOO now is on the upswing and will be a constructive one from here on out.

CHARGE: Federal Report, Page 34, No. 2

According to most persons interviewed, the California SEOO provides little training and TA to the CAA's in California.

AN EXAMPLE OF TECHNICAL ASSISTANCE PROVIDED

In the case of the Santa Clara Legal Aid Society VISTA proposal, this office recommended approval of the project with four conditions. After a full explanation of said conditions to the sponsor, he volunteered to rewrite his complete project proposal to fit these conditions. Thus, T.A. was furnished by the VISTA Coordinator and accepted by the sponsor.

Theresa McInnes
VISTA Coordinator
State Office of Economic
Opportunity

Dear Barney:

Thank you for inviting me to a most interesting training session.

One of your co-workers asked me to write a short evaluation of the training program along with some suggestions for future sessions. I think his name is Faber, but I'm not certain.

The session overall was excellent. Many people came openly hostile and with some disdain for the role of state O.E.O. They left with new respect for the organization but confused about the honesty of many of the things they heard. The director of the Long Beach C.A.P. said it very clearly, "I never call a man a liar until he says he'll deliver, has a chance to deliver, and doesn't deliver."

Nearly every C.A.P. in the state is now waiting for state C.E.O. to reorganize the Oakland C.A.P. and a promise of direct involvement by a C.A.P. committee must be kept if your agency is going to continue to move toward good communication with the agencies. Some people who told me they were on the committee to make certain that services are continued to the poor during the reorganization have no reason to be on the committee. The committee should be made up of Bay Area C.A.P. pros. If he would consent, John Dukes could perhaps persuade to chair that committee. He will not allow himself to be used to "off the C.A.P." and for that reason would show that the decisions made were in the best interest of the poor.

The dangers for the committee are enormous. They could end up being both misunderstood and used. On the other hand it is now up to state C.E.O. to make that committee viable.

My second suggestion is that you ask, through your director, that the govenor stop calling poor people and their representatives by such insulting names. I'm certain that if he was to show less disrespect for poor people that poor people and their representatives would show more respect for you and your organization.

My third suggestion would be to do more training of people to meet the direct, concrete needs of the poor. For instance a training session on housing could help. Housing is a massive coordination, community organization effort and many agencies become involved. In Sonoma County the director of F.H.A. tells me that the problem may be that too many

organizations have become involved. A training session telling a selected person from each C.A.P. how to use programs like 235 D3 and 250 would be exceedingly helpful.

A training session on Manpower would be a natural because the state controls the bulk of the Manpower funds.

Thank you once more for the invitation.

Since gely

ohn Lake

conomic Opportunity Commission of Yolo County, Inc. 313 FOURTH ST., SUITE 5 . ROODLAND, CALIFORNIA, 95695 . TELEPHONE 662-8063 Seale Fuller, Executive Director k Contales, President y Green, Vice-President lardrade, Tressurer April 20, 1971 The greatest good we can do for others is not just to share our riches with them, but to reveal theirs to themselves. Mr. Lewis K. Uhler, Director Office of Economic Opportunity Department of Human Resources Development 800 Capitol Mall Sacramento, California 95814 Dear Mr. Uhler: This is to thank you for your hospitality at the Resources Mobilization Conference. I and the various members of our staff en-

joyed it and believed that it will help us to operate our programs in the coming years, if the resources do, infact, come through.

Too much attention was paid to the past actions and goings on of State CEO verses CAPs, and not enough on a forward looking attitude of "what is going to happen."

Your representatives did make good presentations regarding proposed on-going activities, but more could have been proposed by them if they had been allowed to do so.

My recommendation for future conferences is that the cities be separated from the cal-counties, in order that we can really get to work on our real problems which are different. I feel that this separation would help you to present and us to receive the resource information.

Yours singerely,

RG:hc

Lo mejor que podemos hacer ira otros, no es nomas repartir testras riquezas con ellos, si no velarle a ellos lo que es de ellos



NORTH - COAST OPPORTUNITIES, INC.

P. O. BOX 488 Ukiah, California 95482 Telephone: (707) 462-1954

Lakeport Office: (707)263-4217 Fort Bragg Office: (707)964-5101

April 27, 1971

Mr. Barney Schur Deputy Director State Office Economic Opportunity 800 Capitol Mall Sacramento, California 95814

Dear Mr. Schur:

Pursuant to your telephone conversation regarding my feelings concerning the Resources Mobilization Session held in Sacramento the week of April 12, I feel there were two definite positive outcomes of that meeting.

One was that it allowed several low-income individuals and representatives of low-income other than CAP directors to meet Mr. Uhler and the State OEO staff, as well as to find out what other agencies should be able to assist them in fighting the causes of poverty in the State of California. The second item, and probably the most significant item concerning me, individually, was the commitment of Mr. Uhler, yourself, and Mr. Hawkins to try and work out an intervention and technical assistance procedure between Regional OEO, State OEO and Cal CAP Association to re-assure us that never again will we have to face the situation of a defunding process without corrective action and self-policing taking place.

Our Manpower Program has received some technical assistance from the Fair Employment Practices Commission in the person of Mr. Thompson, who was at the Resource meeting, and we appreciated the opportunity to meet with both him and the representative from the State Personnel Board.

As an improvement in the future, I would suggest you take specific items such as Education, Management, and the other items you tried to cover in small workshops and devote a full two day session to each individual emphasis area. If you ask for prior registration, be sure the training rooms would be of adequate size. Also, these meetings should be bi-monthly or quarterly and not just once or twice per year.

I trust this is what you are looking for. If you have any questions, please do not hesitate to contact me.

Sincerely,

Executive Director

RJG:nlb



6 WEST GABILAN STREET - P. D. BOX 1087 - PHONE (408) 424-0091 SALINAS, CALIFORNIA 93901

April 27, 1971

Mr. Barny Schur, Deputy Director Department of Human Resources 800 Capitol Mall Sacramento, California 95814

Dear Barny:

Thank you very much for your training session with my directors, it was perhaps one of the better sessions that we have had in the area. All of the individuals that participated were impressed and acknowledged that it was a very fruitful endeavor.

I have not yet heard from Charles Blaker with regards to the requested T/A for Delegate Agencies in terms of delegate fiscal controls. I would appreciate some acknowledgement on his part as to when he would be able to provide the requested T/A, because time is a very important factor. The requested T/A is needed today, not six months from today, and if it cannot be provided then we will have to approach some other vehicle.

The GAP session that was provided by ATAC following your presentation seemed to be lacking in some aspects. Understandingly your time is consumed with administrative responsibilities; never the less, we would appreciate any additional training workshop that you would be able to conduct personally. Your knowledge and awareness of programs and resources prove to be of determining benefit and we would like to draw on you as a resource, even if it could be arranged for a once a month visit for the next five or six months, this would be desirous on our part.

Best Regards,

John D. Mathis, Executive Director

JDM/iv

Kerr Courty Economic Oppositionity Corporation

April 26, 1971

Programs:

Mr. Barney Schur State Office of Economic Opportunity 800 Capitol Mall Sacramento, California

020

ECONOMIC & COMMUNITY
DEVELOPMENT

MULTI-SERVICE CENTER

YOUTH PROGRAM

FAMILY PLANNING

EMERCENCY FOOD

URBAN PLANNING

HEW

DOL

NEICHBORHOOD YOUTH CORPS

OPERATION MAINSTREAM

Dear Barney:

My apology for the delay in sending this letter to you; however, correspondence is only one of many things in this office that suffers.

I wanted to take the time to express my feelings about the Resource Mobilization Training Session held in Sacramento recently.

To properly express myself I must start at the end of the session and work backwards. I think that the conference ended on a very positive note. The Vice Chairman of my Board attended the sessions with me and I must admit that had she not been present, I would have left the Conference on Monday morning after it appeared and became quite evident that everything except what the conference was called for was taking place.

I have not talked with any other CAP director; however, before leaving the Conference on Wednesday, I heard several positive remarks made by persons who two days prior had been very anti-conference. Personally, I think the Conference turned out to be enlightening. I realize that the relationship between SEOO and the CAPS has in the past left a lot to be desired. It seems to me that this Conference did a great deal in getting all concerned moving in that direction.

I would have to say that regardless how we might differ on any given issue, that the convictions, concern and knowledge of Mr. Uhler made a very strong and favorable impression upon me.

 ${\bf I}$ look forward to a continued mutual and cooperative relationship with you and your Office.

My regards to Bob Frane.

ry truly yours

Executive Director

EDT:sc

COUNTY OF SAN BERNERDINO

ROBERT A. COVINGTON
Administrative Officer

SERT B. RIGNEY
Assistant Administrative Officer

STEVE FRANKS

Legislative Advocate

COUNTY ADMINISTRATIVE OFFICE

COUNTY CIVIC BUILDING - EAST 157 West Fifth Street San Bernardino, California 92401 Telephone: Turner 4-5161

April 22, 1971

RUBEN S. AYALA ______Fourth District Chairman

WM. A. BETTERLEY _____First District DANIEL D. MIKESELL ____Second District DONALD C. BECKORD _____Third District

NANCY E. SMITH Fifth District

Mr. Barney M. Schur Office of Economic Opportunity 800 Capitol Mall Sacramento, California 95814

Dear Barney,

I enjoyed the opportunity to meet with you. Mr. Uhler and your many colleagues that participated in your recent SEOO Conference in Sacramento. I am convinced that periodic meetings of this nature will enable the many CAPs to keep abreast of the thrust of current programs and provide a forum for the exchange of ideas in a large and dynamic field. Perhaps more importantly it will keep open the channels of communication so essential to mutual confidence and the ultimate success of our programs.

As I discussed with you, we scheduled a training program for the staff of the Dependency Prevention Commission from 6:00 p.m. May 7, 1971 to Noon, May 9, 1971. To give our staff a better insight into the role of SEOO I shall appreciate it if you and Hugh Cunningham can join us for a part or all of this training session which will be held at Monte Corona, a mountain location about 30 minutes drive north of San Bernardino. A brochure is enclosed.

Please advise me as soon as convenient if we might include you on the agenda. Thank you.

Sincerely,

COUNTY ADMINISTRATIVE OFFICE

F. S. KENNEDY Administrative Analyst

FSK: db

cc: H. L. Cunningham

PROJECT SCOUT

Economic Opportunity Commission of Scata Cruz County, Incorporated

Lily Bournague, Director Phone=476-4030= P.O. Box 1185 (130 Van Ness Ave) 724-0661 Watsonville, CA 95076

=605-Bay=Avenue PO_Box=294=
Capitola,=California=95010=

April 20, 1971.

Mr. Lewis K. Uhler, Director office of Economic Opportunity
Department of Human Resources Development
800 Capitol Mall
Sacramento, California 95814

Dear Mr. Uhler:

The recent Technical Assistance Mobilization Conference was of great value. I was very happy to be a participant in the field of aging.

Also, I wish to congratulate you on your successful handling of a difficult situation, "you were right on!"

With the state taking the role of technical assistance, I can see better community action programs.

I am mailing you the FIND book as our Project SCOUT (Senior Citizens Outreach) is the follow-up program. Our whole program is a special project oriented.

Best regards

Lily Bourriague

Director of Project SCOUT

LB/rm encl.

Community Action Council

Tol-shone 944-2196

OF SAN JOAQUIN COUNTY, INC.

MAILING ADDRESS:

306 California Bldg. 11 S. San Joaquin St. Stockton, California 95202 and he fair file fraguing

April 16, 1971

Mr. Lewis Uhler State Office of Economic Opportunity 1800 20th Street Sacramento, California

Dear Mr. Uhler:

We would like to have a list of the technical assistance available through your agency and the name of person we would contact for these services.

Your conference was very informative and I hope we can take advantage of the services you offer.

Yours truly,

Geraldine Montgomery

Community Development Specialist and Training Coordinator

:mw

ECONOMIC OPPORTUNITY COMMISSION OF IMPERIAL COUNTY, INC.

COMMUNITY ACTION PROGRAM

795 MAIN STREET
EL CENTRO, CALIFORNIA 92243

PHONE: 352-8521 352-8527

April 28, 1971

Mr. Robert Frane
State Office of Economic Opportunity
Department of Human Resources Development
800 Capitol Mall
Sacramento, California 95814

Dear Bob,

Just a short note to express my appreciation of the State Resources Mobilization Conference hosted by your office.

It was a very informative conference, and more important, I think that a lot of the people who attended it went away with an entirely different opinion as to the function and intent of S.E.O.O.

I would like to make one suggestion regarding any future meetings and that is that we split the State into two sections, either North and South or Urban and Rural, as I felt that there was too large a group at this one to get the full benefit of everything that was available. I know that I got much more imput from the previous conference which was only for Rural CAA's and the groups were much smaller.

Looking forward to seeing you soon.

Sincerely,

Cameron Hendry

Executive Director

CII/mer

d. Recommendations: All Training and Technical Assistance activities of the SECO should be reviewed for the purpose of opening adequate channels of communication leading to the provision of realistic responses to the Training and Technical Assistance needs of the CAAs in an atmosphere of mutual trust.

2. MOBILIZATION OF RESOURCES:

a. Perception: CAAs, federal agencies and local governmental agencies had very little knowledge of the activities of the California SEOO in the area of resource mobilization. CAAs perceived the SEOO merely as an investigative agency that didn't place a high priority on the mobilization of resources. Federal agencies and local governmental agencies had either no concept of or very little knowledge of the activities of the California SEOO. On the other hand, the California SEOO viewed itself as having done a good job of developing state resources for rural communities.

b. Findings:

- (1) It appears that the SEOO has not given priority to the mobilization and coordination of anti-poverty resources, particularly at the state level. Only 11% of state personnel interviewed answered in the affirmative concerning this question, 22% replied negatively, and 67% said they didn't know.
- (2) The California SEOO, with the assistance of the American Technical Assistance Corporation (A.T.A.C.) conducted a two day workshop in December on mobilization of state resources for rural CAAs. Many state agencies participated and conducted sessions concerning resources available within state government. The SEOO distributed a resource book dealing with state agency resources to some CAAs. *The response from most of the participating CAAs was that they thought that this was a good workshop and were encouraged by the offer of assistance from state agencies. Although this was a good conference, the results will be determined by the delivery system that will be established and the willingness of state agencies to respond to CAA requests.

The SECO also was able to enlist the support of the California National Guard in two airlifts -- one to deliver food and toys to Indian reservations at Christmas time, the other to deliver dental equipment to Indian reservations.

^{*}State Services for Local Government, prepared by Council on Intergovernmental Relations.

Page 35 -- 1. d. - RECOMMENDATIONS (Charge)

All Training and Technical Assistance activities of the SEOO should be reviewed for the purpose of opening adequate channels of communication leading to the provision of realistic responses to the Training and Technical Assistance needs of the CAAs in an atmosphere of mutual trust.

RESPONSE:

The recommendation that all training and technical assistance should be reviewed for the purpose of opening adequate channels of communication for the development of realistic responses is a good one. We are now in the midst of doing this not only through the Resources Mobilization Conference but through personal contacts of all technical assistance personnel with the CAP Board Chairman and the CAP Directors on reviewing the TA needs of these agencies, on following up a report of our visit and also in working cooperatively with the State CPAs and the Regional Field reps on the delivery of TA and our conclusions and evaluations of TA. Therefore, the new relationship that is being evolved between SEOO and other agencies is not only constructive but an informative and an evaluative one as well. The issue of mutual trust is one that will take time and will have to be based on our delivery of specific services to these CAPs, their acceptance of such services, and implementation of programs that do benefit the poor. I think this will take place in a very short period of time.

Page 35 -- MOBILIZATION OF RESOURCES (Charge)

<u>Perception</u>: CAAs, federal agencies and local governmental agencies had very little knowledge of the activities of the California SEOO in the area of resource mobilization.

RESPONSE:

Statements that there is little knowledge of the resource mobilization efforts of SEOO are just not true and is evidenced by the last resources mobilization conference and other statements made in reply to this report about activities that took place in Madera, Merced, Riverside, San Luis Obispo, and other counties that we have served directly with services.

Page 35 -- FINDINGS (Charge)

It appears that the SEOO has not given priority to the mobilization and coordination of anti-poverty resources, particularly at the state level. Only 11% of state personnel interviewed answered in the affirmative concerning this question, 22% replied negatively, and 67% said they didn't know.

RESPONSE:

The allocation of mobilization and coordination of antipoverty resources is a primary activity of SEOO. However, staff and funds for this purpose have been limited. the personnel interviewed did not know what we did and did not have a large knowledge of our activities, many of the people interviewed were not the people with whom this office Therefore the communication problem exists not has dealt. only in SEOO but in the organizations with whom we work. are now endeavoring to solve this problem through news releases, newsletters, inter-office communications, as well as personal contacts with department heads as well as supportive personnel with lines of communications to the Governor and to State agency directors, services from such untapped resources as the National Guard, the Division of Forestry, the Community Colleges, the State Department of Higher Education, State Department of Education, and other areas that have not previously coordinated with in any substantial depth or extended activity. We are now doing this and although it is taking us some time to get to this point, this problem has been corrected. Not only as a result of our communication with other CAPs. Evidence of our followup on our state resources mobilization has not only been in contacts that we are now making for instance with the National Council on Aging and the Emergency Food Program and other programs, but also as evidenced by the conference paper which is being mailed out this week, the week of April 28, 1971, to all the participants in the last Resources Mobilization Conference. All of the participants have also been solicited and many responses have been made from CAPs on their reaction to the conference and their recommendations for constructive suggestions to the next conference. Additionally, CAPs and poor people will be involved in the planning of the next resources mobilization conference.

A coordinated delivery system on the availability of followup technical assistance is now being worked out and negotiated between Bill Smith of Regional OEO, between Al Kennefick of ATAC, between Kermit Bailer of SDI and myself, Barny Schur, in charge of TA for SEOO. A coordinated program and scheduling of TA personnel statewide will be developed by these four principles and each one will take responsibility for different areas of coordinated planning and delivery of TA services statewide. A workshop or mobilization conference as indicated on Page 36, number 4, has been worked out and held in April, 1971 and was the second resources mobilization conference and was a successful conference.

- (3) Finally, many CAAs probably will not request assistance from the California SECO or state agencies since they are reluctant to have contact with these agencies.
- c. Conclusions: The SECO has not been sufficiently effective in the mobilization and coordination of state anti-poverty related resources nor have they developed and assisted in the development of state resources to the degree necessary to gain the respect of the CAAs. The December Resource Mobilization Conference for rural CAAs and the Air National Guard "air lifts" are their best efforts to date. At the present time, there are not any significant measurable results as to the actual mobilization of state resources following the December conference.

d. Recommendations:

- (1) Since the SEOO has direct lines of communication to the Governor, the agency should be able to influence policy and the delivery of state anti-poverty related resources. The agency should make a concentrated effort to mobilize and coordinate state resources in order to meet the needs of low-income persons and CAAs.
- (2) Intensive follow-up on the Resource Mobilization Conference should be made to insure the rendering of technical assistance and other services from the state agencies that participated.
- (3) A delivery mechanism should be established to insure availability and follow-up on available state resources.
- (4) A workshop for urban CAAs similar to the one held for rural CAAs should be conducted.
- (5) CAAs should be encouraged to request assistance from the SEOO in gaining access to available state resources.

3. COORDINATION AND PLANNING:

a. Findings:

(1) The SEOO considers planning for activities that affect the poor to be a function of other agencies of state government. This attitude is consistent with their perception of their role as advocates of the poor. While the Economic Opportunity Act of 1964, as amended, emphasizes participation of the poor in planning processes, there was little evidence that the SEOO shares this view or has taken steps to involve the poor in any planning processes. This attitude has resulted in a conflict between SEOO, CAAs and the Regional Office regarding the steps to be taken to achieve involvement of the poor in the planning process.