

II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

Fiscal Years	2016	2017	2018	2019	2020
Capital Expenditures	0				
Operating Costs	84,641				
External Revenue	(84,641)				
Program Income					
In-Kind Match (County)					
NET FISCAL IMPACT	0				

# ADDITIONAL FTE POSITIONS (Cumulative)					
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Is Item Included In Current Budget: Yes X No _____

Budget Account No.:

Fund 1003 Dept 145 Unit 1458 Object Var. Program Code/Period GY16

B. Recommended Sources of Funds/Summary of Fiscal Impact:

Funding source is FACA.

C. Departmental Fiscal Review: M

Taruna Malhotra, Director, Financial & Support Svcs.

III. REVIEW COMMENTS

A. OFMB Fiscal and/or Contract Development and Control Comments:

[Signature]
 OFMB ^{KD} 10/29/15
 AK 9/30/15

[Signature]
 Contract Development and Control
 B. Wheeler 11/4/15

B Legal Sufficiency:

[Signature]
 Assistant County Attorney

C. Other Department Review:

 Department Director

This summary is not to be used as a basis for payment.



MEMORANDUM

TO: Shelley Vana, Mayor
Board of County Commissioners

THRU: Robert Weisman, County Administrator
Board of County Commissioners

THRU: Jon Van Arnam, Assistant County Administrator
Board of County Commissioners

FROM: Channell Wilkins, Director
Community Services Department

DATE: August 25, 2015

RE: **The Office of the Florida Attorney General
Chase Grant Application**

Department of Community Services

810 Datura Street
West Palm Beach, FL 33401
(561) 355-4700
FAX: (561) 355-3863
www.pbcgov.com

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**Palm Beach County
Board of County
Commissioners**

Shelley Vana, Mayor
Mary Lou Berger, Vice Mayor
Hal R. Valeche
Paulette Burdick
Steven L. Abrams
Melissa McKinlay
Priscilla A. Taylor

County Administrator

Robert Weisman

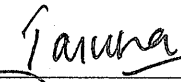
Pursuant to Section 309 of the Administrative Code, your signature is needed on The Office of the Florida Attorney General (OAG) Chase Grant Application. This application for \$84,641 will be utilized to provide financial literacy and housing counseling services for clients. No County funds are required.

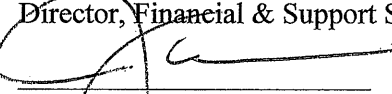
The OAG announced a settlement with JP Morgan Chase. Under the settlement, the Florida Association for Community Action (FACA) received \$1,200,000. Funds must be utilized within the State for legal services, financial literacy, and other programs related to assisting Floridians in managing debt. Palm Beach County Community Action Program (CAP) has been selected to receive funding from this settlement to be used in accordance with the settlement. CAP will use these funds to provide individual financial literacy counseling, workshops, seminars, home ownership classes, as well as a variety of services that focus on financial literacy.

The application was received on August 3, 2015 and on August 12, 2015, a conference call was held with the OAG and FACA to discuss the grant application procedures. The grant is due no later than August 31, 2015. The emergency process is being utilized because there is not sufficient time to submit the application through the regular agenda process. Staff will submit this item at the Board's next available BCC meeting date

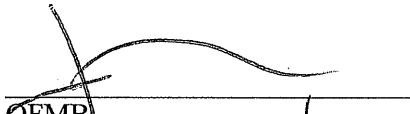
If additional information is needed, please contact Kelvin Bledsoe at 561-355-4208.


Approved by:



Director, Financial & Support Svcs.


Jon Van Arnam
Assistant County Administrator



OFMB


Assistant County Attorney

"An Equal Opportunity
Affirmative Action Employer"

- Attachments:
1. Chase Grant Application
 2. Exhibit C – Settlement Amount

AGENCY CONTACT INFORMATION

Name of Agency: Enter the name as it should appear on a contract.

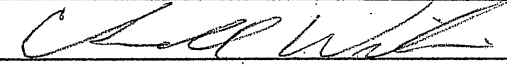
County of Palm Beach

Federal Employee Identification Number (FEIN): 89-6000785

Agency Director: Prefix (Mr., Ms., Dr., etc.) Mr. Title: Director of Community Services
Name: Channell Wilkins
Telephone #: 561-355-4702 Fax #: 561-656-7303
Mailing Address: 810 Datura Street (Street, P.O. Box, etc.)
City: West Palm Beach State: FL 9-Digit Zip Code: 33401
E-Mail Address: Cwilkins@pbcgov.org

Performance Report Contact: Prefix (Mr., Ms., Dr., etc.) Mr. Title: Program Coordinator
Name: Kelvin Bledsoe
Telephone #: 561-355-4208 Fax #: 561-355-3155
Mailing Address: 810 Datura Street (Street, P.O. Box, etc.)
City: West Palm Beach State: FL 9-Digit Zip Code: 33401
E-Mail Address: Kbledsoe@pbcgov.org

Financial Contact: Prefix (Mr., Ms., Dr., etc.) Mrs. Title: Director of Finance and Support Services
Name: Taruna Malhotra
Telephone #: 561-355-4716 Fax #: 561-355-3863
Mailing Address: 810 Datura Street (Street, P.O. Box, etc.)
City: West Palm Beach State: FL 9-Digit Zip Code: 33401
E-Mail Address: Tmalhotr@pbcgov.org

Signature of Agency Director:  Date: 26 May 2018
Channell Wilkins, Director
Community Services Department

Agency Name:

County of Palm Beach

Public
State
On Reservation
Off Reservation
Statewide

PART 1: AGENCY INFORMATION

List counties to be served: (indicate each county served or STATEWIDE for service to all counties)

Palm Beach County

PART 2: PROJECT DESCRIPTION

The project description should clearly outline what will be done and by whom.

Urban
Rural
Mixed

1. Describe the scope of work the activities and/or services will be provided. (Responses below are limited to 1000 characters) Attach additional pages as needed.

Palm Beach County Financial Literacy project will seek to provide individual counseling sessions; workshops, seminars, and group classes that address basic financial literacy, banking, credit worthiness, predatory lending, budget management, home ownership, and work readiness. Clients will be assisted in understanding bank lending practices, steps to home ownership, managing credit, understanding the benefits of using a budget, and ways to obtain, maintain and/or increase their salary through better employment. The target audience includes residents of high foreclosure areas, high crime areas, and traditional areas where predatory lending may occur. Clients will be initially assessed through a financial assessment questionnaire and a pre-test to determine client knowledge of financial literacy and financial status. A post test will be provided at the conclusion of training along with follow up interviews after two months and a final interview at six months. Progress will be measured by increased test scores and improved financial status such as an active bank account, increased savings, increased credit score, participation in a home ownership program, and/or debt reduction. Client will be able to demonstrate a increased understanding of financial literacy and an awareness of how to avoid financial pitfalls.

2. Describe the deliverables for the project in quantifiable terms, including a minimum level of service. For example, indicate the total number of individuals that will be served and the total services provided, and detail monthly or quarterly expectations. Each deliverable must be related to the scope of work described in #1. (Responses below are limited to 1000 characters) Attach additional pages as needed.

Based on their individual circumstances, 375 clients will be provided financial literacy and housing counseling services. Clients will have the opportunity to participate in the following services: 1. Financial Literacy 2. Basic banking services 3. credit worthiness 4. Predatory lending awareness. 5. Credit card management and 6. Budget management. Each service will be presented in blocks of 2-4 hour sessions based on client assessment scores. A minimum level of service will include one two hour classroom session on financial management. Services will take place at each of five locations in Palm Beach County Community Action sites or partner agency locations which cover each region of the county area. Individual client sessions will be available based on client need and level of participation. Client tracking will be ongoing throughout the year with expectations of serving 94 clients per quarter with 32 clients on a monthly basis. Monthly and quarterly reports detailing client participation will be submitted to address areas need, level of client participation, client progress, and program quality. Adjustments will be made based on information gathered.

Agency Name:

County of Palm Beach

PART 3: PERSONNEL BUDGET

Complete the table below for each position to be funded from grant proceeds. In the explanation section indicate if the salary/benefit expenses listed

Position	Total Actual Cost
n/a	\$ -

Agency Name:

County of Palm Beach

PART 5: EQUIPMENT BUDGET

Items included in this section must be furniture and/or equipment costing \$1,000 or more. If awarded funds in this

Equipment:				
Description		Number	Cost Per Item	Total
1	Laptops	5	\$1,200.00	\$ 6,000
2				\$ -
3				\$ -
4				\$ -
5				\$ -
6				\$ -
Equipment Subtotal		5	1200	\$ 6,000

Budget Narrative:

1.	Laptops will allow the assigned workers to work with clients at a variety of times and locations.
2.	
3.	
4.	
5.	
6.	

Agency Name:

County of Palm Beach

PART 6: OTHER BUDGET ITEMS

Please include any budget items or anticipated expenditure of grant fund not included in previous schedules.

Other Items:				
Description		Number	Cost Per Item	Total
1	Mobile WIFI services and fee for one year of monthly service	5	\$50/month for 12 months	\$ 3,000
2	Miscellaneous	1	\$ 641.00	\$ 641
3				
4				
5				\$ -
6				\$ -
Other Items Subtotal				\$ 3,641

Budget Narrative:

1.	Personal WIFI devices for mobile internet service will be used to access client data for each counselor for \$50 per month for one year
2.	Miscellaneous items related to laptop use and mobile WIFI services
3.	
4.	
5.	
6.	

Agency Name: County of Palm Beach

PART 7: BUDGET SUMMARY

Budget Summary By Category - Provide the subtotal for	TOTAL BUDGET	
Personnel	\$	-
Contractual Services	\$	75,000
Equipment	\$	6,000
Other	\$	3,641
TOTAL	\$	84,641

Agency Name: County of Palm Beach

1 Are there currently any family relationships that exist between the board of directors, the agency's principal officers, the agency's employees, and any independent contractors? YES/NO NO

If yes, describe any and all family relationships that exist.

2 Are you aware of any interests, direct or indirect, that exist with the current board of directors, the current agency principal officers, the (a) Sale, purchase, exchange, or leasing of property? (b) Receiving or furnishing of goods, services, or facilities? (c) Transfer or receipt of compensation, fringe benefits, or income or assets? (d) Maintenance of bank balances as compensating balances for the benefit of another? YES/NO NO NO NO NO

If yes to any above, describe any and all interests that you are aware of at this time.

3 Are any current board of directors, current agency's principal officers, current agency's employees, or any current independent contractors indebted to the agency? YES/NO NO

If yes, describe the nature of the debt.

4 Have any current board of directors, current agency principal officers, current agency employees, or any current independent contractors misappropriated assets or committed other forms of fraud against the agency? YES/NO NO

If yes, describe the nature of the misappropriation.

By signing this form, I hereby certify that the information contained in this questionnaire is true and accurate to the best of my knowledge

for Shelley Vana Signature Print Name

Date 31 Aug 2015 Title Mayor

Approved As To Form And Legal Sufficiency

ATTEST: Sharon R. Bock Clerk and Comptroller

By: Assistant County Attorney

By: Deputy Clerk

BOARD OF COUNTY COMMISSIONERS
 PALM BEACH COUNTY, FLORIDA
BUDGET AMENDMENT

BGEX - 145 - 101315*0107
 BGRV - 145 - 101315*0010

FUND (1003) - COMMUNITY ACTION PROGRAM

Use this form to provide budget for items not anticipated in the budget.

ACCT.NUMBER	ACCOUNT NAME	ORIGINAL BUDGET	CURRENT BUDGET	INCREASE	DECREASE	ADJUSTED BUDGET	EXPENDED/ ENCUMBERED AS OF 10/13/15	REMAINING BALANCE
REVENUE								
145 1458 6694	Grant From Oth Non-Govt	0	0	84,641	0	84,641		
Total Revenue		1,080,617	1,080,617	84,641	0	1,165,258		
EXPENDITURE								
145 1458 3421	Contractual Service-Training	0	0	84,461	0	84,461	0	84,461
Total Expenditures		1,080,617	1,080,617	84,461	0	1,165,078	0	1,165,078

BUD_BLNK.xl

COMMUNITY SERVICES

INITIATING DEPARTMENT/DIVISION Channell Wilkins
 Administration/Budget Department Approval
 OFMB Department - Posted

Signatures

Date

By Board of County Commissioners
 At Meeting of November 17, 2015



10/27/15

 Deputy Clerk to the
 Board of County Commissioners