



*Montgomery County, Maryland*  
**Community Action Board**  
**Annual Report**  
**2008-2009**

Department of Health  
and Human Services  
Office of Community Affairs  
Montgomery County, Maryland  
[www.montgomerycountymd.gov](http://www.montgomerycountymd.gov)

8210 Colonial Lane  
Silver Spring, MD 20910  
phone: 301.565.7460



The Montgomery County Community Action Board is the governing body for the Montgomery County Head Start Program and the Community Action Agency. The 2008 Annual Report is printed and funded through the Community Service Block Grant. An annual report on the Head Start program is required by Public Law 110-134 "Improving Head Start for School Readiness Act of 2007" reauthorizing the Head Start program, Sec. 644 (a)(2) [42 U.S.C. 9839].



The *Community Action Board Annual Report 2008-2009* can be made available in alternate formats by calling 301-565-7460 (voice), 301-565-7467 (Fax), or by emailing [Sharon.Strauss@montgomerycountymd.gov](mailto:Sharon.Strauss@montgomerycountymd.gov).

**Montgomery County Maryland  
COMMUNITY ACTION BOARD  
2008-2009**

**Chairperson: Pamela Luckett  
Vice Chairperson: Steve Galen  
Secretary: Julieta Machado-Pacanins**

Trinette Chase, *Mid-County*  
Yvette Chesson-Wureh, *Legal Aid Bureau, Inc.*  
Lisa Conlon, *Board of Education*  
\*Lillian Durham, *Housing Opportunities Commission*  
William L. England, Jr., *Human Rights Commission*  
\*Steven M. Galen, *Primary Care Coalition*  
Lauren Harper, *Montgomery County Coalition for the Homeless*  
Craig Holston, *Gaithersburg*  
Tonya M. Hughes, *Rockville (former Head Start Policy Council member)*  
Carolyn Jones, *Public Works & Transportation*  
Abigail Kendzior, *Bethesda/Chevy Chase*  
\*Luann Korona, *Housing & Community Development*  
\*Pamela Luckett, *County Council Designee*  
\*Julieta Machado-Pacanins, *Spanish Catholic Center, Catholic Charities*  
Ana Marshall, *Silver Spring*  
Corky McCorkle, *Recreation*  
Keith Melbourne, *Child Care Services*  
Marlon Mitchell  
Lauren Newman, *Health & Human Services*  
\*Melpi K. Jeffries, *League of Women Voters*  
\*Luther Elliott, *Alpha Phi Alpha Fraternity, Inc.*  
Trica Young-Williams, *County Executive Designee (former Head Start Representative)*  
Walter Woods, *Takoma Park (Head Start Policy Council Representative)*

The Community Action Board (CAB) serves in an advisory capacity to the County Executive and County Council, and as an advocate on behalf of the poor and working poor of the County. Members are appointed by the County Executive and confirmed by the County Council.

The Board has four areas of responsibility:

- *Assessing the needs and problems of low-income people in the County;*
- *Recommending programs to meet the needs and solve the problems;*
- *Reviewing the Community Action Agencies' staff implementation of those programs; and*
- *Maintaining County policy and service delivery from the point of view of low-income residents.*

**Want to become involved?**

The Community Action Board meets on the Fourth Tuesday each month at 7 pm, except in July, August and December. Meetings are held at 401 Hungerford Drive, Rockville, in the Tan Conference Room. The Executive Committee meets on the 2nd Tuesday of each month at 4 pm, at 8210 Colonial Lane in Silver Spring, Suite "B."

*For more info, or accommodations,  
please contact the staff liaison, Sharon Strauss, 301-565-7465,  
Sharon.strauss@montgomerycountymd.gov*

## HISTORY OF COMMUNITY ACTION

On August 20, 1964, President Lyndon Baines Johnson signed into law, Senate Bill 2642, better known as the Economic Opportunity Act of 1964, declaring “unconditional war on poverty.” Title II of that law, provided for urban and rural communities to mobilize their resources to combat poverty through Community Action Programs. The most important provision of the Economic Opportunity Act was the requirement that Community Action Programs be developed, conducted, and administered with the maximum participation of area residents.

The following year, Community Action Agencies (CAA) were established, and Head Start programs opened around the country to provide comprehensive services—including health care, social services, and early education—to low-income preschool children. Since then, the Montgomery County CAA and its Board, have been charged with the responsibility of recommending programs to improve the lives of the County’s poor, the development of leaders within low-income communities, and the development of systems to increase their self-sufficiency, self-esteem and gain more control over their own lives. Today, the national Community Action Partnership network remains the largest single provider of Head Start programs.

The Community Action Board (CAB) serves as the governing body for Montgomery County Head Start. CAB shares program governance with the Head Start Policy Council and works closely with Montgomery County Public Schools, the delegate agency providing services, under the auspices of the Department of Health and Human Services (DHHS) Community Action Agency, the official grantee, and in collaboration with DHHS’ Early Childhood and School Health Services.



Together, this strong partnership assures that some of Montgomery’s most economically fragile children, including those with disabilities, are receiving the education, health, nutrition, and social services they need to succeed in school. Parents are involved in all aspects of the Head Start Program, with representatives serving on the Head Start Policy Council as well as the Community Action Board.

Originally, a number of Community Action services were delivered directly by County employees. Over time, nonprofit community providers have assumed this work, with the support of volunteers and a blended funding stream that includes, but is not wholly reliant upon, public resources. Staff of the CAA provide technical support to strengthen these services and to monitor that public funding is spent as intended.

### Enabling Legislation: Article IV. Community Action Agency, Sec. 27-40.

**Statement of policy:** “It is the public policy of the County to promote programs to create an awareness of poverty; promote coordination among private and public agencies concerned with poverty; promote better use of existing resources and develop leadership among poor citizens to solve community problems; and develop broad community strategies to attack the basic causes of poverty.”

(1976 L.M.C., ch. 1, § 1; 1977 L.M.C., ch. 28, § 10; 1977 L.M.C., ch. 30, § 15; 1997 L.M.C., ch. 25, §1.)

**In Sec. 27-41** (a), it is further stated that “There is a Community Action Agency within the Executive branch of the County government. The Agency creates and maintains community action programs to encourage the use of public and private resources to enable low-income people to become self-sufficient; to reduce poverty in the County; to involve the low-income population in developing and carrying out anti-poverty programs in the County; and to make government more responsive to the needs of low-income people.”

## The Montgomery County Community Action Board's 2008-2009 Advocacy Priorities



### Our Mission:

**To conduct and promote programs that creates an awareness of poverty, to promote coordination among agencies and better use of resources, to develop leadership among low-income residents of the County, and to develop community strategies to attack the basic causes of poverty.**



### **Protecting the Safety Net, Maintaining Critical Services for Poor and Low-Income Residents, While Improving Quality.**

The Community Action Board testified about the growing needs of economically challenged families in the County, and joined in County advocacy efforts to alert officials regarding the County's obligation to help them to remain housed and stable, and cope with rising costs of fuel, food and health care. As families' financial situation deteriorated, a record 38,524 children received MCPS Free and Reduced Meals in 2008, and Manna's food bank served 35,435 County households -- a 43% increase in FY08. With tough times, more residents turn to the Department of Health and Human Services (DHHS) and community partners for help, with rising numbers of residents reporting child abuse and seeking suicide intervention. CAB highlighted statistics indicating the record number of people seeking food stamps, Temporary Cash Assistance (TCA), health, rental and home energy assistance. Furthermore, the CAB testified concerns to County (and to State officials reducing funding to Local Management Boards) that as vulnerable families experience additional stressors, health, mental health, protective and substance abuse prevention services remain essential in assuring community safety. DHHS' efforts to integrate case management and Quality Services Review are viewed as strategies yielding long-term cost-savings in staffing, while improving services to residents. The CAB supported the restoration of Ride-On funding for youth and seniors.

**Expanding VITA.** The Community Action Board testified in support of the Community Action Agency's Volunteer Income Tax Assistance program, which engages volunteers and helps low-income residents to increase family resources. CAB's testimony stressed Community Action's VITA unique capacity to work in partnership with HHS and nonprofit case managers, serving persons with mental and physical disabilities, limited-English speakers, frail seniors and the homeless. With the declining economy expanding demand for VITA, and people suffering, the Board approved a funding proposal to the use CSBG federal funding from the American Recovery and Reinvestment Act (ARRA) to integrate an expansion of VITA, financial literacy, employment and training to those County residents adversely impacted by the recession, those who've recently lost employment and are homeless, and those at-risk of losing their home.

**Building Financial and Adult Literacy.** The Community Action Board supports increasing the provision of financial literacy and English classes as effective strategies to boost the income of low-wage workers, while protecting the economy. The Board urges MCPS' to expand financial literacy for all secondary students, noting the consequences of a lack of financial education, which affect all County residents and the County's economic stability.

**Strengthening Head Start.** The Community Action Board supports comprehensive, early childhood education for young children and their low-income families, promoting learning and assuring their health, safety and well-being. Head Start and prekindergarten services for four year olds provide a critical gateway to kindergarten, and CAB was grateful to the Board of Education for expanding full day Head Start classes from 13 to 21, using Title I funding. To solidify early learning gains and family stability, a continuum of care is needed for the vulnerable 3-year olds "aging out" of Early Head Start. The CAB advocated to the State to preserve MSDE State Supplemental Head Start funding.

## Montgomery County's 2008-2009 Head Start Program

**Head Start** is a comprehensive program to prepare young children, ages 3-5, for success in school. Grant funded services are provided for low-income children and families including developmentally appropriate pre-school education, health and social services, services to children with disabilities, as well as a nutrition and parent involvement program. **During the past year, 648 three and four-year-old children were served in 35 classes in 28 schools and 2 private child care centers.** Children in the private child care center sites were able to receive full day services in one location, a boon for working families. The program is measured annually using MSDE definitions of readiness; full readiness is defined as consistently demonstrating skills, behaviors, and abilities needed to meet kindergarten expectations successfully. Demand for the program exceeds the enrollment capacity. Given priorities for limited federal funding, Head Start funded wraparound services were discontinued in favor of assisting Head Start families access state and local child care subsidy programs.

**Head Start Enrollment and Attendance:** Montgomery County's school based program follows the calendar of Montgomery County Public Schools (MCPS)

Head Start Enrollment	Total # Served SY 06-07	Total # Served SY 07-08	Total # Served SY 08-09
September			648
October	648	648	648
November			648
December			648
January	646	647	648
February			648
March	637	648	648
April			646
May			643
June			642
<b>Average Attendance Rate</b>	<b>89.35%</b>	<b>90.58%</b>	<b>91.3%</b>
<b>Average Enrollment</b>	<b>594.4</b>	<b>643.1</b>	<b>646.5</b>

Head Start Services	Total # Served FY07	Total # Served FY08	Total # Served FY09	Total # Planned- FY10
<b>Funded Enrollment</b>	<b>648</b>	<b>648</b>	<b>648</b>	648
MCPS Head Start Enrollment	585	599	618	618
Community-Based Head Start in Child Care Centers	34	35	30	30
Total Actual Enrollment	722	738	735	
Full Day Head Start classes	4	14	14	21
Wrap around Child Care Services/ before and after "school"	42	43	0	0

## Montgomery County's 2008-2009 Head Start Program: TRENDS

Percentage of enrolled children that received medical exams in SY 08-09: 95%

Head Start Health Services	Total # Served FY07	Total # Served FY08	Total # Served FY09
Medical exams	94%	88%	95%
Health insurance at end of enrollment	90%	88%	95%
Dental Exams/ preventive care	89%	85%	90%

**"More families living in or near the federal poverty level want and need Head Start."** - Pamela Luckett, CAB Chair

The socio-economic status of the Head Start students and the high cost of housing in Montgomery County create the conditions for a high level of mobility that may negatively affect children's attendance. However, attendance and enrollment figures over the last three years have shown improvement. Teaching teams and family service workers collaborate with parents by providing support and problem-solving strategies to remove barriers to participation.

**Anticipate increasing numbers of eligible applicants.** Services for children who cannot gain Head Start enrollment are currently available (on a limited basis) through the MCPS prekindergarten program. Economic factors linked to the recent recession are increasing the number of families below the federal poverty level.

**Experience shortage of Head Start spaces for eligible three year olds.** With the implementation of the *Bridge to Excellence in Public Schools Act*, a Maryland State education act that required prekindergarten for all economically disadvantaged and at-risk 4-year-old children, there is high demand for services for all four years olds to prepare for kindergarten.

**Wraparound services discontinued due to insufficient funding.** Less critical services have to be reduced to maintain a robust comprehensive program which meets federal Head Start Performance Standards.

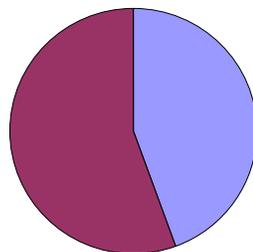
**Increasing numbers of full day classes.** After studying research supporting greater gains for children attending its six hour programs, the Montgomery Board of Education designated additional Head Start Title I funds to be used to increase the number of full day classes to 21 of the 35 classrooms or 60% in FY10, continuing a two-year trend to dramatically increase the number of full-day Head Start seats.



There is extreme shortage of spaces for 3 year olds: Over 300 eligible children have registered for 30 dedicated slots in the past several years, Montgomery County Head Start applied for ARRA Head Start expansion funding for a classroom of 3 year olds in partnership with the up-county Early Head Start program.

### Facts about Montgomery County's Head Start Families:

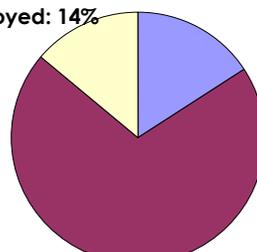
1-parent families: 55%



Family Structure

2- Employed: 16%

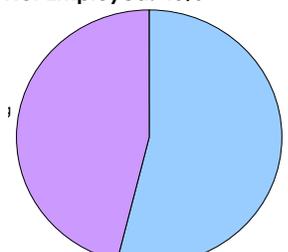
Not Employed: 14%



1- Employed: 70%

2- parent families

Not Employed: 46%

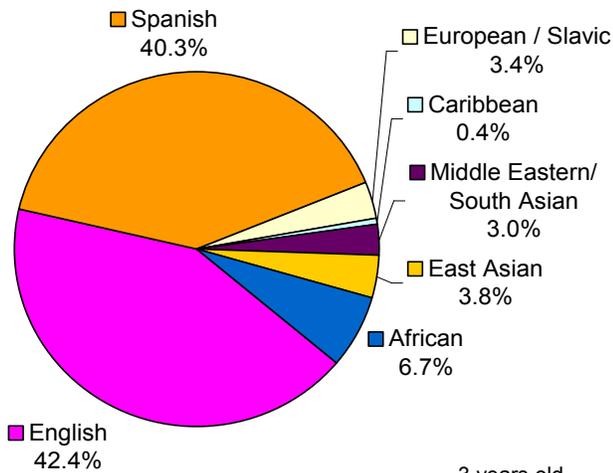


1- Employed 54%

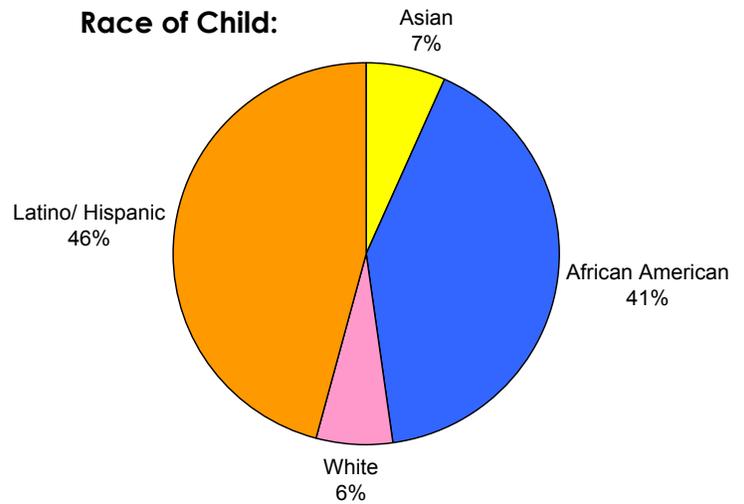
1-parent families

### Montgomery County's 2008-2009 Head Start Program: FACTS

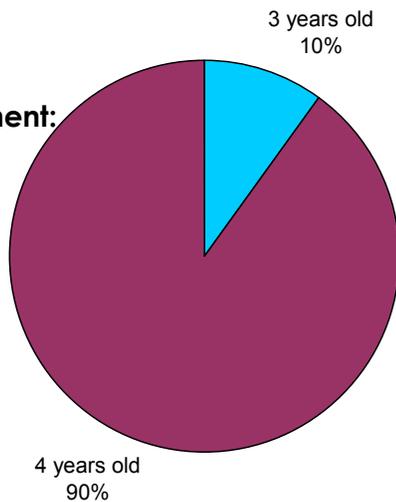
#### Primary Language of the Family at Home:



#### Race of Child:



#### Age at Enrollment:



**Ready for Kindergarten:** The Montgomery County Head Start Program offers a quality educational experience to children and families in order to prepare them with the foundational knowledge and skills necessary for success in kindergarten and beyond. The Pre-K/Head Start curriculum is aligned with the **Maryland State Department of Education's Voluntary State Curriculum and Montgomery County Public Schools' K-8 Curriculum Framework**. The curriculum provides a strong emphasis on literacy and mathematics foundational concepts and skills, with age-appropriate science, social studies, art, music, movement and technology experiences. Head Start teachers utilize research-based instructional strategies in whole-group, small-group, and one-on-one settings. Information gathered from ongoing assessments and parent contacts are used to individualize instruction to promote optimal learning and development. Parents are provided with information and materials to support their children's learning at home and are encouraged to participate in all school experiences. Before leaving the Head Start program, Head Start staff provides a variety of activities to help children and families make successful transitions into kindergarten. As a result, Head Start children enter kindergarten fully ready to succeed in school. **The Maryland Model for School Readiness (MMSR)** is a body of standards and an assessment tool that teachers use at the start of each school year to assess and observe the school readiness of entering kindergartners in Maryland public schools. The MMSR measures what each child knows and is able to do in the seven "Domains of Learning."

Head Start Performance Measure	SY01-02	SY 07-08	SY 08-09	Planned
Percentage of Head Start students who demonstrate "full readiness" upon entering kindergarten	52%	63%	68%	70%

## Head Start Program Engages Parents and Partners



### Family Service Workers Help Families

During the 2008-2009 school year, family service workers (FSWs) made 844 home visits and 3,020 phone calls to Head Start families, and had 1,860 direct contacts with families at school or in the community. FSWs made 2,220 referrals to connect families with community-based public, nonprofit and private resources, including 1,025 referrals for emergency food and clothing. FSWs conduct monthly parent meetings at center, and take applications for the program throughout the year: 407 applications for Head Start income eligible 3-year olds and 1,139 applications for Head Start income eligible four-year olds.

### I Am Moving, I am Learning!

The Head Start/Child Care Summer Institute trained a wide Head Start constituency, including the County's Head Start staff as well as our child care partners. Head Start consultants from University of West Virginia (Choosy Kids, Inc.) conducted the conference at the UMD Shady Grove, to help early childhood educators combat the rise of obesity in young children. There were 92 participants, including Head Start teachers, paraeducators, and family service workers, school nurses, Head Start supervisors, and 29 directors and staff from 14 child care programs. Teachers and paraeducators used their knowledge throughout the year to help children and colleagues enjoy a moderate to vigorous level of physical activity every day, increasing the quality and frequency of movement activities while promoting healthy eating.

Services received by Head Start Families	
Families receiving one or more services	100%
Parenting education	100%
Emergency/crisis intervention (shelter, food, clothing)	49%
ESL (English classes)	20%
Housing assistance	17%
Adult Ed/GED	15%
Job training	13%
Mental health services	11%
Health education	4%
Domestic violence	2%
Marriage education	2%
Assistance to families of incarcerated individuals	2%
Child abuse/neglect	1%
Substance abuse	1%
Domestic violence	1%
Child support assistance	1%



## Head Start Budget Basics:

Program Year (PY) 43 = School Year (SY) 2008-09 = Fiscal Year (FY) 2009

### PY 43 COMPARISON OF BUDGET AND EXPENDITURES FOR HEAD START & PY 44 PROPOSED

CATEGORY	FY09 BUDGET	FY09 AFTER ADJUSTMENT*	EXPENDITURES	FY10 AWARD
Personnel	\$3,646,768	\$3,646,768	\$3,690,652	\$3,753,336
Travel	\$14,173	\$14,173	\$13,022	\$14,173
Duplicating			\$17,164	
Equipment			\$1,538	
Supplies	\$64,995	\$64,995	\$48,834	\$75,740
Contractual	\$583,000	\$556,971	\$518,782	\$584,677
Other	\$60,729	\$60,729	\$53,640	\$73,559
<b>Subtotal Federal</b>	<b>\$4,369,665</b>	<b>\$4,343,636</b>	<b>\$4,343,632</b>	<b>\$4,501,485</b>
Non Federal	\$1,493,299	\$1,092,416	\$1,092,416	\$1,125,371
<b>Total</b>	<b>\$5,862,964</b>	<b>\$5,436,052</b>	<b>\$5,436,048</b>	<b>\$5,626,856</b>

\*In FY 09, there was an offset against our Program Year 43 (FY09) grant funding level due to an unobligated balance of \$26,029 in Program Year 41 (FY07). Therefore, total funding made available to Montgomery County, MD, was reduced from \$4,369,665 to **\$4,343,636**.

**Personnel** includes teachers, paraeducators, speech pathologists, psychologists, social workers, social service assistants, community health nurses, school health room aides, dental hygienist, nurse administrator, community services aide, program manager, and administrative specialist. *Fringe benefits* are included in the personnel costs category. *Travel* includes all costs associated with reimbursing staff for travel to Head Start sites to provide health and dental services, and for staff and parents to attend trainings and national, regional, and state conferences.

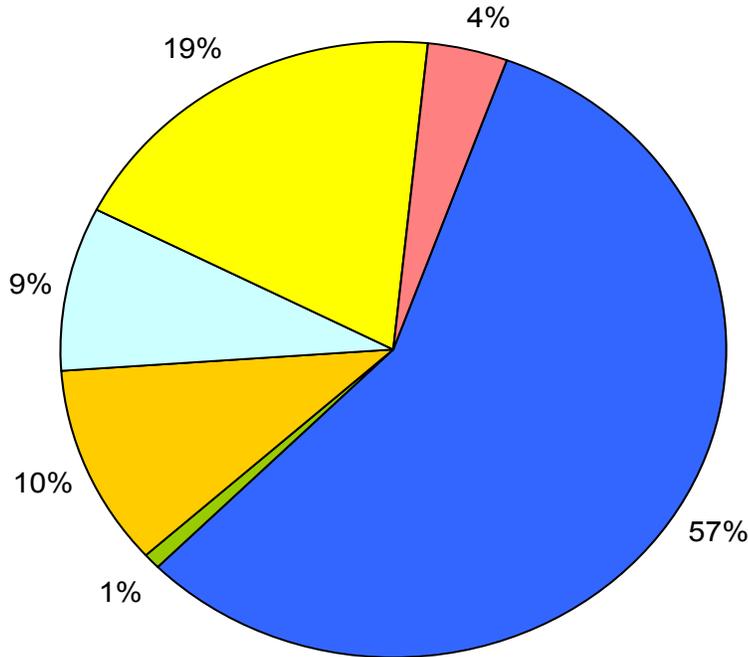
**Contractual services** provides the delegate with funds for the required audit (A133), and training and technical assistance for delegate staff. Contractual health costs include specialty dental treatment providers, not available through insurance or dental clinics, and Mobile Medical Care, Inc. to provide contractual Head Start Nurses. Under Community Action Agency (CAA) contractual services includes funding for Community-Based Head Start child care center sites and for governance training for the Policy Council and Community Action Board on the duties associated with shared governance, and methods to achieve the board's goals within the structure of Montgomery County Government.



**Other funding** within MCPS covers a variety of expenses including training & staff development, facility rentals for after-hours staff training, child liability insurance, parent services such as training, wellness activities, parent/child mathematics and literacy activities, bus transportation for classes to attend field trips, reimbursement of mileage for home visits and parent meetings for teachers, paraeducators, special needs teacher, and social service assistants. Other funding for CAA provides assistance with costs for family related activities, supplementary field trips and supplies for Community Based Head Start, program recruitment and registration materials, such as printing Head Start advertising posters for MC Ride-On buses, and supplies necessary to conduct various meetings.

These funds also provide a range of administrative supports to the Montgomery County, MD, Head Start Program such as local travel costs for contract monitoring and other grant monitoring. Limited funding is also available to supplement the USDA Food Program reimbursement for Community Based providers, as required. Other funding for School Health includes costs associated with continuing education and performance standard training for Head Start School Health Room nurses, technicians and hygienists and providing educational training experiences and materials for parents, students and non professional staff.

**Head Start Budget at a Glance: FY 2009 Program Year 43 School Year 2008-2009**



■ MCPS	\$3,211,050
■ MCPS (T/TA)	\$57,823
■ Community Action Agency (CAA)	\$589,493
■ School Health	\$485,270
■ Non Federal Cash & In-Kind Expenditures	\$1,092,416
■ USDA	\$212,000

**2008-2009**  
**MONTGOMERY**  
**COUNTY'S**  
**HEAD START**  
**PROGRAM SERVED**  
**648 CHILDREN**

**Results of the most recent review by the Secretary and the Financial Audit.**

The Administration for Children and Families conducted an on-site monitoring and follow-up review in Spring 2009 to determine whether identified findings from the 2007 triennial review had been corrected. The findings were all corrected or closed as corrected with no further action required. The 2010 Triennial Monitoring Review is scheduled to occur during the first quarter of SY09-10.

Financial Audit: Montgomery County has an annual Independent Auditor's Report on Internal Control, Over Financial Reporting and on Compliance and Other Matters, Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*. A copy of the Audit for the year ending June 30, 2008, is available at the County's website:

[www.montgomerycountymd.gov/content/finance/pdf\\_FINReports/FY08\\_Single\\_Audit.pdf](http://www.montgomerycountymd.gov/content/finance/pdf_FINReports/FY08_Single_Audit.pdf).

The most current Montgomery County MD Report on Expenditures of Federal Awards for Fiscal Year 2008 was performed for the County Council and County Executive by Clifton Gunderson LLP, Certified Public Accountants and Consultants.

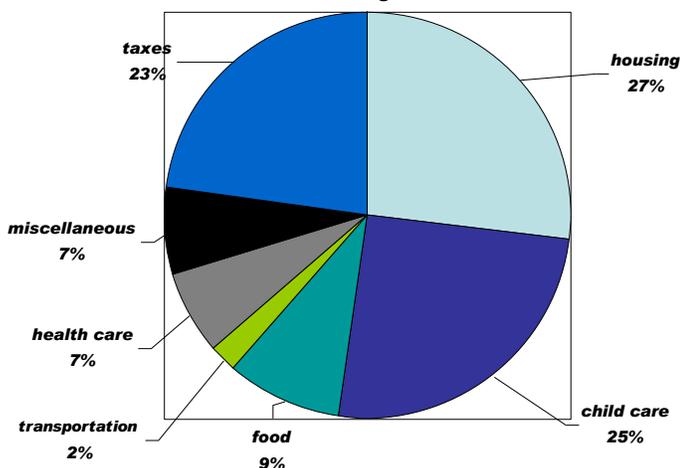


## Community Action Board Releases 2008 Self-Sufficiency Report: Family of Three Needs \$68,086 to Live in Montgomery County without Assistance

In November, Community Action Board members joined with County leaders to release the Montgomery County Self Sufficiency Standard Report, 2008. Board Chair Pamela Lockett Community Action Board said, "This reminds our community that many of our neighbors are facing tough economic times, while the face of poverty is hidden among our otherwise affluent community. With almost one in three children eligible for free lunches, Montgomery's needs are very real. People on the fringe of self-sufficiency do not think of themselves as poor, but they are hard-hit, losing work in this recession."

The self-sufficiency standard is a measure of how much income is needed for a family of a given composition in a given place, to adequately meet its basic needs—without public or private assistance. The report notes a Montgomery County family-of-three (one adult, one pre-schooler, one school-age child) needs an income of \$68,086 to live at a minimum level. Reflecting Montgomery's demographics and federal welfare-reform policies limiting benefits for families with a stay-at-home single parent, the prototypical family-of-three's parent is working, requiring preschool and after-school child care to assure the children are safe.

**Monthly Costs for One Adult, One Preschooler,  
One Schoolage Child**



The report, produced every two years, includes income eligibility requirements for various county, state and federal programs, a confusing maze for most consumers, and demonstrates the inadequacy

of federal poverty income guidelines—used to determine eligibility for federal and state programs—to meet essential needs, since they do not reflect Montgomery's higher costs, especially for housing and basic child care. In 2009, the federal poverty level (FPL) for a family of three for one adult and two children was \$18,310. The historic federal poverty thresholds were developed in 1963-1964 by multiplying the cost of the economy food plan by three.

Montgomery's self-sufficiency standard information is gathered by examining costs for 70 representative family configurations, ranging from a single adult to a family of five, with two adults and three children. Expenses used to calculate the self-sufficiency standard include food, housing, utilities, transportation, child care and health care. A small miscellaneous fund captures few frills, including insurance, appliance purchase or repair, furniture, and emergency reserves.

"Families in our community are having a difficult time making ends meet," said Uma Ahluwalia, Director of the Montgomery County Department of Health and Human Services. "The cost of housing and child care makes it very challenging for low income working families. Our programs, as well as community-based non-profit organizations are finding more people than ever seeking food, shelter, and other resources to meet their basic needs."

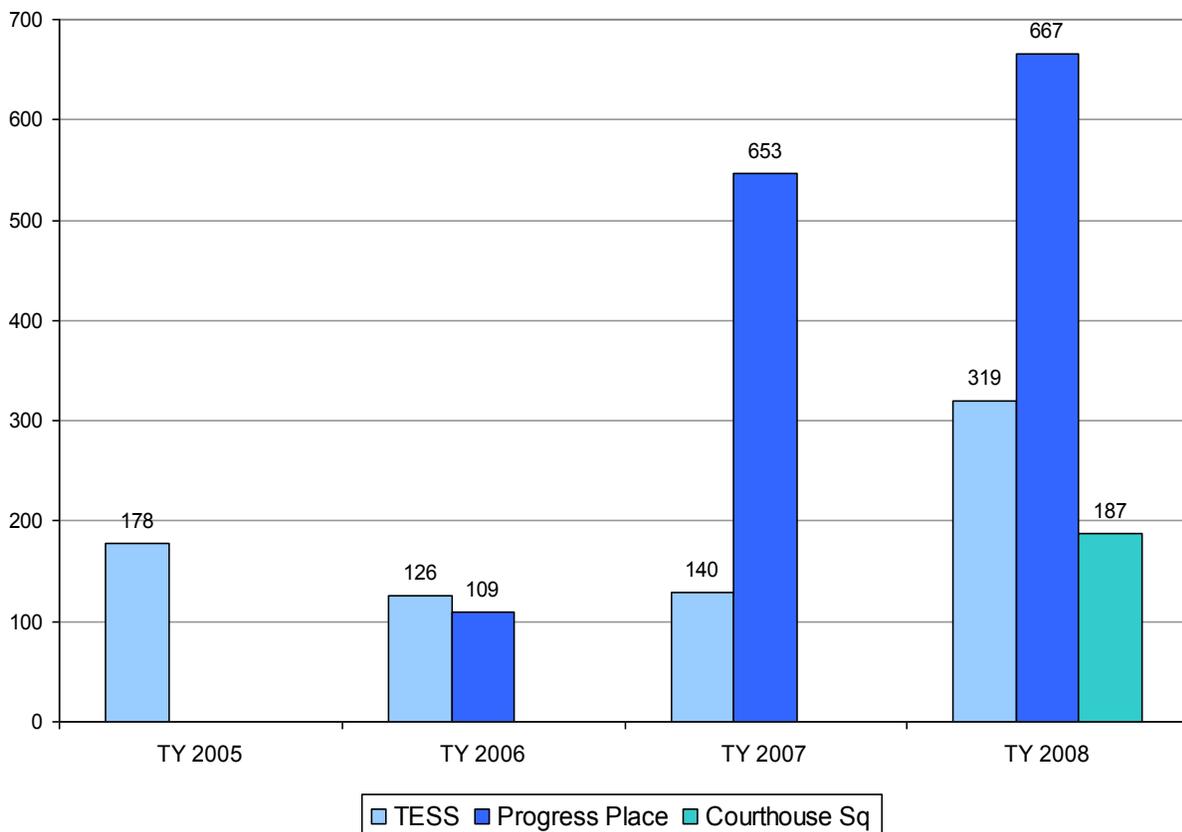
The data was shared with Maryland Senator Richard Madeleno, chair of the Senate's Budget and Taxation committee, and staff to U.S. representative Chris Van Hollen, Maryland. The report is also available for disseminated to advocates, elected officials, and representatives of the County's Boards, Committees and Commissions, and to faith groups, as well as to government, nonprofit and private service providers, who share the information with funders and consumers.

Initially developed as the "Report on the Minimum Standard of Need" by the Board in 1985, the production of the Self-Sufficiency Standard is a collaboration former Takoma Park, Maryland parent, Dr. Diana Pearce, now a senior researcher the University of Washington. The 2008 report updates the 2007 Maryland Self-Sufficiency Standard a report prepared through the cooperative efforts of the University of Washington, Center for Women's Welfare and Advocates for Children and Youth (ACY). An electronic copy of the report is available at the County's website.

## VITA Expands to Serve Families at Three County Sites

Montgomery County Community Action Agency believes addressing the basic causes of poverty helps low-income people to become more economically self sufficient. Among its strategies, the Agency improves the lives of poor and low-income residents by linking them to Voluntary Income Tax Assistance (VITA) services to increase their financial assets. VITA maximizes greatly needed financial resources while generating revenue back to the community. An outreach campaign, engaging community partners, educated the community, with 75,000 fliers about VITA and Maryland and federal Earned Income Tax Credits (EITC). VITA's free tax preparation assistance targets low to moderate income residents including persons with disabilities, limited-English proficiency and older taxpayers. Trained volunteers help taxpayers access the Earned Income Tax Credit, Child Tax Credit, and other benefits, while connecting taxpayers to financial counseling and other resources. This year, Community Action Agency opened its third VITA site in partnership with the City of Rockville, with continuing service at Progress Place in Silver Spring and at TESS Services Center in Takoma Park.

**In tax year 2008, Community Action's VITA increased participation by 48%, serving 1,173 residents, up from 793\* in TY07, returning \$1,077,484 (Federal), \$389,830 Maryland), and \$339,740 (Federal EITC).**



**Community Action's VITA program has special certification from the IRS to work in partnership with HHS and community case managers to address the complex needs of residents experiencing homelessness, domestic violence, mental illness, dementia and other disabilities, as well as aging and limited English populations,** the only organization to receive this special exemption in Montgomery County. Community Action's VITA program links residents to HHS and community resources, while assisting low-income and immigrant residents to secure an Individual Tax Identification Number (ITIN). By facilitating access to ITINs, VITA helps residents to avoid tax problems and supports their efforts to build the financial records required to establish housing and credit. VITA targets outreach to public and nonprofit programs and facilities serving seniors, the homeless, low-income residents and people with disabilities. Through an aggressive media and mail campaign, 75,000+ pieces were distributed, educating consumers about benefits, the Earned Income Credit, and E-Filing of taxes, bringing info to health, job, and housing fairs, the County Fair and other events, as well as reaching stores, faith groups, libraries and Manna's food bank. After the "season" ends, VITA continues filing returns and resolving tax issues.

\*The 2007-08 Annual Report reported 451 residents were served in TY07. The increased number reported reflects additional returns filed.

Nationally, in 2008, the average VITA client earned \$18,800 before taxes or about \$9 per hour. At this hourly rate, a person must work 21 hours just to cover the average cost of tax preparation at a well-known for-profit chain. This same person needs to work nearly 6.5 additional hours to purchase this company's refund anticipation loan.

*Statistics from the National Community Tax Coalition*

VITA provides a free, safe alternative to the commercial tax preparation chains as well as to untrained and unlicensed tax preparers who often target low-income filers during tax time. **Community Action's accuracy rate for returns submitted in TY08 was 97%!** In the 2008 recession, Community Action's VITA program put dollars into the pockets of residents, linking them to savings through e-filing, and helped them avoid the high cost of Refund Anticipation Loans (RALs) and similar loan products.



**Rockville's VITA Team Celebrates Community Action Month with Board and Staff**

Tax Year 2008	Total # Returns	Total \$ Federal Refunds	Total \$ Maryland Refunds	Total # EITC Returns	Total Federal EITC Refund	Average \$ EITC Refund	% EITC Returns
TESS	319	\$203,563	\$ 96,562	53	\$56,356	\$1,063	35%
Progress/Rockville	854	\$873,921	\$293,268	249	\$283,384	\$1,140	34%
<b>TY08 Total</b>	<b>1,173</b>	<b>\$1,077,484</b>	<b>\$388,830</b>	<b>342</b>	<b>\$339,740</b>	<b>\$1,102</b>	<b>34.5%</b>

Tax Year 2007	Total # Returns	Total \$ Federal Refunds	Stimulus Refund Amount	Total Stimulus Refunds Prepared	Total \$ Maryland Refunds	Total # EITC Returns	Total Federal EITC Refunds	Average \$ EITC Refund	% EITC Returns
TESS	140	\$127,365	\$66,200	46	\$38,493	22	\$41,580	\$1,890	28%
Progress	653	\$683,310	\$324,900	186	\$280,394	186	\$236,899	\$1,274	35%
<b>TY07 Total</b>	<b>793</b>	<b>\$810,675</b>	<b>\$391,100</b>	<b>232</b>	<b>\$318,887</b>	<b>208</b>	<b>\$278,479</b>	<b>\$1,582</b>	<b>31.5%</b>

Tax Year 2006	Total # Returns	Total \$ Federal Refunds	Total \$ Maryland Refunds	Total # EITC Returns	Total Federal EITC Refund	Average \$ EITC Refund	% EITC Returns
TESS	126	\$187,735	N/A	48	\$ 86,729	\$ 1,807	33%
Progress	109	\$156,479	N/A	43	\$ 66,760	\$ 1,553	48%
<b>TY06 Total</b>	<b>135</b>	<b>\$344,214</b>	<b>N/A</b>	<b>91</b>	<b>\$153,489</b>	<b>\$1,680</b>	<b>40.5%</b>

## A Salute to Community Partners

In the Community Action Agency's early history, it provided or developed many direct services for low-income people living in the County. Today, the Montgomery County Community Action Agency is responsible for the oversight and monitoring of contracts and agreements with Community Based nonprofit agencies serving the Montgomery County community. These contracts ensure services addressing the causes and consequences of poverty, while keeping pace with emerging needs by developing or adapting local services. Together with the Community Action Board, the Agency's partners promote the development of leadership skills among existing and emerging populations most affected by poverty, helping all residents to maximize their potential, while joining together to end poverty.

### In FY 2009, CAA's partners and the services included:

- ▣ **Caribbean Help Center** - Provided ESOL classes and human service referral for Caribbean immigrants. In FY 2009, in collaboration with Manna Food Center, Caribbean Help opened a food bank and assisted 250 persons needing emergency food.
- ▣ **CASA De Maryland-**
  - Employment & Training-** Provided Employment, Training and Support services to over 4,000 multicultural residents.
  - Rent and Utilities-** Provided funding to cover the cost of Rent and Utilities in a public school where ESOL classes were provided for 496 participants.
  - Vocation Training Pilot** – Provided Vocational Training workshops for CASA's Labor centers, serving 150 participants. Offered courses in construction trades, child care, computer skills and home care companionship.
- ▣ **Catholic Community Services** - Provided Emergency Services, Outreach, and Case Management to low income residents in the County serving over 1,900 cases.
- ▣ **Harmony Career Institute-** Delivered a Foreign Teacher's Exchange Program in partnership with MCPS, supporting the training for five Chinese teachers with regards to life in the United States by giving them a general understanding of the school system, culture, and traditions.
- ▣ **Interfaith Works (CMMC) Clothing Closet-** Operated two clothing centers distributing donated clothing and housewares free of charge. A total of 45,584 volunteer hours and \$4.04 million worth of goods were donated.
- ▣ **Impact Silver Spring-**
  - Core Services** - Provided community involvement and leadership development programs. Over 500 Impact graduates are now members of lasting impact.
  - IMPACT Neighborhood** - A renter's engagement strategy for renters engaged 50 renters; 16 of them graduated from Impact's leadership program.
  - Impact in the Schools** - Provides Empowerment and Leadership skills for parents in Montgomery County Public Schools. Ten parents partnered with teachers, delivering after-school tutoring in five elementary schools.
- ▣ **Korean Association of the State of Maryland Metro Area Inc. -** Provides Computer classes, Social Service referrals and ESOL classes. The ESOL classes served 325 students in FY09.

- ▣ **Language Translation and Interpretation Services** - In February 2009, Translations International Inc. took over from Advance Communication & Translation Inc. and provided language interpretation and translation services for the Montgomery County Department of Health and Human Services. North VA Health Education Center and CTS language Link also provided these services.
- ▣ **LECUDO-USA-** Provided services for 36 Cameroon immigrant youth in a weekend program to enhance Academic Performance in school.
- ▣ **Manna Food Center** – The County's designated food bank served 59,038 adults and 43,481 children in 2009. A total 35,746 volunteer hours were donated by groups and individuals to individuals and families referred by case managers.
- ▣ **Montgomery County Bar Foundation** - Provided Pro Bono Legal Services Program to serve low-income residents of the County. 2,498 cases were intakes for FY09; 1,064 were family cases and 573 were consumer cases.
- ▣ **Silver Spring Team for Children and Families, Inc. – Benchmarks Program Silver Spring** – provided services to 34 middle and elementary school youth in the Rosemary Hills community. Students participated in community service projects and maintained or improved their academic performance.
- ▣ **Silver Spring Team for Children and Families, Inc. – Foreign Born Learning Center**  
The Foreign Student Center helps students learn to cope with life in the United States. 119 participants enhanced their learning using the Rosetta Stone program on computers at the Long Branch community center.
- ▣ **Somali American Community Association Inc.** - Provided services to 176 low income Somali immigrant youth by providing a mentoring homework program. The Adult Program served 101 unemployed and underemployed women which focused on job readiness skills and health awareness.
- ▣ **Spanish Catholic Center-ESOL Program** –Provided English as a Second Language (ESOL) training program in the Gaithersburg area and served 813 individuals this fiscal year.
- ▣ **Women Who Care Ministries-** Distributes food, free of charge to low income residents of Montgomery County. Their "Helping Kids Eat" program served 250 children weekly from October through June.

## FY09 CAA Service Partner Funding: \$2,100,023

### Community Action Partners Share Successes:

**PREVENTING HOMELESSNESS:** The customer came to *Catholic Charities'* Wheaton office for rental assistance to avoid eviction in May. After helping her to obtain rental assistance for one month from FEMA, the family support worker connected her with County agencies to avoid another eviction. The family support worker assisted her family to find enough food, and supported her search for work, until she was able to find a job with enough income to pay for her rent.

**PROMOTING SELF-SUFFICIENCY:** A woman from Somalia with an elementary school education enrolled in the *Somali American Community Association* adult program to learn basic typing, computer skills, and office technology. Her husband told the staff "she will not learn much at all; she will be wasting her time, and your time." Despite a lack of initial support, she began improving her skills, and as she did, her husband also began believing in her ability. The husband and family members attended her graduation with pride. He now relies on his wife to help him with letters and Internet research. She is now exploring a career as an office clerk, and her husband plans to enroll for classes to improve his skills too!

## Board Engages the Community at Faithfulness Together Event

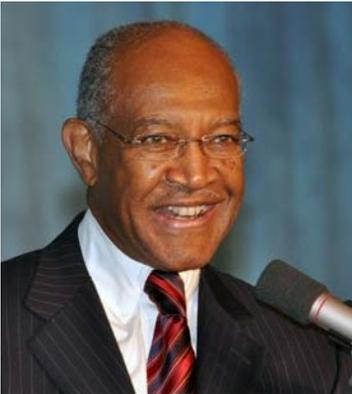


Photo of Reverend Forbes,  
United Methodist News Service

In October of 2008, Reverend Tim Warner, liaison to the African-American and faith groups from the County Executive's Office of Community Partnerships, met with the Community Action Board, inviting members to join in the County's first

*"Faithfulness Together: Conversations About Justice, Mercy and Self-*

*Sufficiency in a Diverse County"* event, held in November at B'nai Israel Congregation in Rockville.

Dr. James A. Forbes, Jr., Senior Minister Emeritus of New York City's Riverside Church (and brother of Anna Forbes Towns, past chair of the Community Action Board) delivered the key-note remarks.

Health and Human Services director Uma Ahluwalia highlighted the Board's Self-Sufficiency Standard in her remarks, and shared statistics about the economic challenges facing growing number of Montgomery people hit the hardest by the recession.

Board members served as facilitators in round-table dialogue, as participants identified ways their congregations might work with others to help with rising human needs. This theme was echoed by CAB chair Pamela Lockett, who said in a Gazette interview, "Government resources are dwindling, so no one organization, no one group, can do it; but together we can."

## Community Action Month Recognizes Volunteers

In May 2009, CAB members joined to honor volunteers at the Vis Arts Center in Rockville in recognition of the Board's 26<sup>th</sup> National Community Action Partnership's Community Action Month. Betty Lam, chief of HHS' Office of Community Affairs, made opening remarks, observing that volunteers play a key role, noting "in a difficult economy, volunteers link neighbors with resources and augment critical legal, and health and human services." Community Action's executive director Lizzie James served as mistress of ceremonies, and acknowledged Board members for their volunteer advocacy, and for governing Head Start and the Community Action Agency. CAB chair Pamela Lockett, with Troy Plater at her side, presented the first Marcia L. Plater Community Action Service Awards and recalled, "Marcia Plater established the County's first central food bank, organized services for day laborers, and made sure dilapidated homes were renovated." She noted Plater's role launching the Minimal Standard of Need, and in engaging partners to eventually produce the Board's Self-Sufficiency Standard.

Turning to the awardees, the chair recognized Plater winner William Rippey, who volunteers with HOC's Family Self-Sufficiency program, tutoring GED and college math. She said "Mr. Rippey, an engineer at NIST, made students feel comfortable, from an 83 year old who received a degree from Columbia Union College, to an office manager who graduated from the University of Maryland" and said, "they were the first in their family to make these strides." Lockett presented an honoree award to Olu Edegbai, a volunteer in HOC's after school program. *(continued, p. 18)*



### **Marcia L. Plater Community Action Service Awards:**

*William Rippey (winner)*

Olumide Edegbai (honoree)

### **Henry L. Dixon Community Action Service Award:**

*HOPE Worldwide Mid-Atlantic*



Clockwise: Uma Ahluwalia, Betty Lam, & Patsy Evans; Maureen Larenas & Volunteer; Pamela Lockett & Hope friends, William Rippey & Troy Plater; HOC staff, Troy & Lizzie James with awardees; Guests.



CAB's vice-chair Steve Galen presented the 2009 Henry L. Dixon Community Service. Dixon, a former Board member, was known for cultivating relationships with County political leaders to assure that the problems facing low-income people were heard. Galen congratulated the Dixon winner, Hope worldwide Mid-Atlantic, for improving the lives of residents of Rockville's Rock Creek Terrace apartments, bringing after-school, and Saturday academic support and leadership training for teens, Hope's service programs for youth, and annual school supplies and holiday giving campaigns.

Galen gave special kudos to Walter Woods, a CAB Board member, for having been named Montgomery's Parent of the Year at the 2009 Maryland Community Action Partnership and Maryland Head Start Association Conference.

Uma Ahluwalia, Director of the Montgomery County Department of Health and Human Services, said "the Board's support has been critical in assuring that services for Montgomery's poor and most vulnerable community members remain protected in a tough budget year, through the actions and support of Council members and Executive Leggett."

Director Uma Ahluwalia thanked Community Action volunteers for providing tax help, Pro-Bono and other services, acknowledging the impact, especially for low-income residents, and those with special needs, limited English, or little knowledge of their rights, and was flanked by Community Action staff Maureen Larenas. Ahluwalia observed "VITA links residents to the world of banking," noting "the refunds and tax credits generated are immediately returned to our local economy, often to the small businesses in those neighborhoods most impacted by the recession."

The TESS Center volunteers: **Elsa Strohecker, Sarah Harris, Tatiana Lopez and Tamara Williams**. TESS' Pro-Bono legal volunteers: **Kenneth Auerbach, Roger Golden, Jerry C. Lyell, Ricky Malik, Jay S. Marks, Patricia McDonald, Kathryn S. McDonough, Daniel V. Renart, Prya Sharma, David Vega and Juan Washington**. **Twenty-two VITA volunteers\*** were honored, along with VITA Partners. **The City of Rockville**, which provided space, staff and program support at the new VITA site in Rockville, **HEW Credit Union**, which helped residents open savings accounts, and **Project Reboot**, which distributed approximately 200 computers to VITA customers.

\*Names of VITA volunteers are not included due to confidentiality requirements of IRS.

## Department of Health and Human Services– TESS Center

Located in the Long Branch/Takoma Park community, the Community Action Agency (CAA) oversees and staffs the Department of Health and Human Services “TESS Center” (Takoma East Silver Spring Community Service Center). “TESS” reaches a predominately low income immigrant population, bringing culturally-friendly information, assessment and referrals about public and community programs, as well as resources and assistance to help residents access services. The program manager and community services aides help customers to prepare the documentation required to access a range of services, such as Income Support, Food Stamps, Medicaid, HOC, Rental and Utility Assistance.

Customers seek the hands-on support of trusted TESS Bilingual professionals as they address landlord-tenant and housing problems, consumer issues and in completing social security forms and job applications. TESS provides free notary public services, corrects birth certificates records, provides paternity affidavits, and provides certified translation (Spanish/English) of vital documents, such as birth, baptismal, marriage and death certificates. In addition, customers may receive eligibility screening for Dental and Eye Clinics, and referrals to Manna and Clothing Closets. Besides providing direct services, TESS offers a variety of community health, prevention and early intervention partnerships and is a site for Pro-Bono Legal Services, the Silver Spring Judy Center, and Community Action’s VITA program.

**In 2008 –2009, the “TESS” Center provided services to 7,043 customers, not including VITA or Legal Services.**

**TESS: Limited English Proficiency Services, June 2009**

Number of LEP contacts: **588**

Number of interpreting minutes: **10,905**

## Department of Health and Human Services- East County Office

When the Eastern Montgomery County Regional Services Center opened, Community Action Agency (CAA) leadership was responsible for overseeing its HHS services, including the delivery of health services. Over time, growing health care needs from the community led to a decision to renovate the space to allow improved health care access through Montgomery Cares’ partner, The People’s Community Wellness Center, serving uninsured and underinsured adults. Beginning in FY 10, the East County site will be staffed by the Department’s Emergency Services staff, who will continue to provide a critical link to housing stabilization related services. The Department will seek partners in the East County area to establish a Neighborhood Safety Net Service Center to provide additional assistance to connect people to food and housing related emergency services.



**COMMUNITY ACTION AGENCY**

Montgomery County Department of Health and Human Services

8210 Colonial Lane, Suite B  
Silver Spring, MD 20910  
(301) 565-7460



**PROMISE OF COMMUNITY ACTION**

Community Action changes people’s lives, embodies the spirit of hope, improves communities. And makes America a better place to live. We care about the entire community, And we are dedicated To helping people help themselves And each other.

- Lizzie James, Executive Director
- Sharon Strauss, Program Manager; Assistant Director, Community Action Board
- Diana Day, Office Services Coordinator
- Patsy Evans, Program Manager, Head Start
- Denall Fowler, Administrative Specialist
- Karen Fisher, Community Services Aide, East County and Progress Place
- Kemeka Henry, Community Services Aide, TESS Center
- Gladys Hernandez, Community Services Aide, TESS Center
- Maureen Larenas, Program Specialist, TESS Center
- Aizat Oladapo, Program Manager, Contract Monitor
- Brenda Glenn, VITA Coordinator (Consultant)
- Janet Lee (Consultant)

