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**COUNTY OF SANTA BARBARA**

## **Funding Application for 2024-25 Fiscal Year**

1. Name and address of Organization: United Way of Santa Barbara County
2. Total Request (\$): \$10,000
3. Agency is a 501(c) 3? Yes EIN: 95-1641968
4. Regular business of the agency:
5. Executive Director: Steve Ortiz  
Phone #: 805-965-8591  
Email: [sotiz@unitedwaysb.org](mailto:sotiz@unitedwaysb.org)  
Website: [www.unitedwaysb.org](http://www.unitedwaysb.org)
6. Program Director: Frances Contreras  
Phone#: 805-882-0518  
Email: [fcontreras@unitedwaysb.org](mailto:fcontreras@unitedwaysb.org)
7. Years Agency has been in operation: 102 years
8. Other funding secured for this activity: United Way of Santa Barbara County (UWSBC) partners with agencies at the local and state level to support the VITA program. Funding is received from the regional network, United Ways of California, as well as corporate sponsors such as Wells Fargo Bank.
9. Identify which target population will ultimately benefit from your strengthened organization: (i.e., elderly, disabled, HIV/AIDS, homeless, children, youth, low income): United Way of Santa Barbara County strengthens financial security for residents by providing accessible community programs and services. This event will specifically benefit Santa Barbara County residents earning \$67,000 or less annually, including young families with children under six years old, individuals with limited income, seniors aged 65 and older, and young adults, such as college students.
10. Please state the name of the program for which funding is being requested and describe overall goals that you are proposing. Be specific, achievable and measurable:

### **Overall Goals:**

The Mega Tax Day & Financial Resiliency Resource Fair aims to provide critical tax preparation services and financial resources to low-income households in Santa Barbara County, empowering them to achieve greater financial stability and resilience. This initiative is part of United Way of Santa Barbara County's

broader Financial Security Initiative and is supported by the Volunteer Income Tax Assistance (VITA) program.

**Tax Preparation Services:**

Provide free, accurate, and timely income tax return preparation and e-filing for at least 300 low-income households earning \$67,000 or less in 2024.

**Maximize participation in key tax credit programs, such as:**

- California Earned Income Tax Credit (CalEITC)
- Young Child Tax Credit (YCTC)
- Federal Earned Income Tax Credit (EITC)
- Federal Child Tax Credit (CTC)

**Financial Resiliency Resource Fair:**

- Connect attendees with essential financial resources, offering actionable guidance on saving for emergencies, college, and retirement.
- Promote access to affordable banking options, with onsite bank account creation services provided by partnering financial institutions.
- Raise awareness about financial literacy through interactive educational tools and materials provided by nonprofit and community-based organizations.

**Collaborative Partnerships:**

- Partner with local banks and credit unions to deliver financial literacy resources and create opportunities for attendees to open low-cost bank accounts.
- Collaborate with nonprofit organizations to expand outreach efforts and deliver financial education materials.
- Engage government agencies to offer critical services, such as ITIN application assistance, tax credit education, and other financial support services.

**Community Engagement:**

- Create a family-friendly event atmosphere, including opportunities to win prizes for visiting financial literacy tables and participating in activities.
- Offer incentives to encourage community participation, such as engaging activities for families and children.

**Data and Impact Tracking:**

Collect and report key outcomes, including the number of federal and state e-filings completed, as well as the total amount of tax credits claimed (e.g., CalEITC, YCTC).

This event seeks to address financial barriers faced by low-income individuals and families, equipping them with practical tools and knowledge to build lasting financial security. The requested funding will support program execution, including volunteer coordination, outreach efforts, event logistics, and community partnerships, ensuring measurable impacts on financial resilience for Santa Barbara County residents.

We certify that the information in this application is true and accurate to the best of our knowledge and is submitted with our Governing Body's full knowledge and endorsement. We also certify that we will use the requested funds as set forth and for the purposes identified in this application if the Board of Supervisors approves this application.

Board President:	<small>DocuSigned by:</small> <i>Cliff Lundberg</i> <small>21C58EAAA2144E6...</small>	3/6/2025
Executive Director:	<small>Signed by:</small> <i>Steve Ortiz</i> <small>2BA74C8FB604416...</small>	3/6/2025