

Exhibit B – Program Description and Scope: Individual Disaster Assistance Grants (IDAG)

History and Evolution of the Individual Disaster Assistance Grants Program:

United Way of Santa Barbara County's (UWSBC) IDAG program is rooted in years of experience responding to past disasters and community needs. The program was established in response to the Thomas Fire and Debris Flow of 2017 and 2018. UWSBC's approach and program structure was greatly expanded to become a countywide model serving thousands during the COVID-19 pandemic of 2020 and 2021. The IDAG program is designed to get immediate cash support to Santa Barbara County residents who are directly impacted by disasters, and to prioritize that support for those who are most vulnerable.

Under UWSBC's leadership, the IDAG program is uniquely positioned to fill critical gaps that frequently emerge during times of community crisis. It is often the case that local disasters, or the damage caused by them, do not meet the criteria necessary for state and federal partners to make disaster financial assistance for individuals available. Additionally, even in disasters where federal and state funding for individuals is made available, it is the case that many County residents who have suffered losses will not qualify. Further, the amount provided to those who do qualify is often far from what is necessary to make them whole. It also often takes months for qualified disaster survivors to receive financial assistance once they have navigated the often-complex application process.

Making the Individual Disaster Assistance Grants Program Permanent

Recognizing the critical importance of this program, UWSBC has committed to making the IDAG a permanent component of Santa Barbara County's system of preparing for, responding to, and recovering from disasters, threats, and emergencies. Proactively establishing the IDAG as a permanent resource ready to be launched when community crises strike will enable UWSBC to distribute money to those in need soon after individual needs are verified, rather than having to scramble to raise funds after a disaster event occurs.

United Way's approach to a sustainable and rapidly responsive IDAG program is based on the establishment of a permanent fund at UWSBC prior to a community crisis occurring, thereby enabling immediate distribution of grants when the need arises. Establishment of a permanent IDAG program will be through investments and commitments made by local donors and philanthropic foundations, as well as by United Way of Santa Barbara investing its own cash and human resources into this permanent fund.

United Way will also maintain the core infrastructure of the IDAG on a permanent basis. Doing so will ensure that the IDAG systems and processes necessary for communications, application review and verification, and accountability and reporting remain in place and are ready to be launched at a moment's notice.

Moving forward, UWSBC will also work and partner with the Santa Barbara County Office of Emergency Management (SBCOEM) to ensure the IDAG program is developed to be an effective and permanent component of the County's all-hazards preparedness, response, and recovery system.

UWSBC will support a strong and effective IDAG program by:

- a) Establishing and maintaining a permanent IDAG program fund as a UWSBC-led program that is supported and maintained in advance of disasters with UWSBC funds and donations from philanthropic partners.
- b) Establishing a "charitable class" that allows groups of individuals to receive assistance from tax-exempt charitable organizations. Note: per IRS guidelines, not all disasters allow for the establishment of a

charitable class. "A charitable class must be large enough or sufficiently indefinite that a community as a whole, rather than a preselected group of people, benefits when a charity provides assistance". For more information see Department of Treasury links: Disaster Relief: Meaning of "Charitable Class" | Internal Revenue Service and <https://www.irs.gov/pub/irs-pdf/p3833.pdf>.

- c) Ensuring the IDAG model prioritizes financial support for people/households that have suffered a verifiable loss due to disaster, and also ensuring the programmatic flexibility necessary to meet the diverse impacts that arise from disasters.
- d) Engaging and maintaining a network of nonprofit, government, philanthropic, school-based, business, faith-based, trusted messengers, and other community partners of UWSBC's choosing that can help ensure effective and timely countywide communications to inform individuals/households that have been impacted by a disaster about the availability of funds and how to apply for support.
- e) Maintaining agreements and relationships with relevant partner agencies, nonprofits, and philanthropy so all parties are prepared to play their contractual and/or partnership-base roles supporting deployment of the IDAG when needed – UWSBC retains all decision-making authority over the IDAG and which agencies it chooses to partner with to support its implementation.
- f) Designing the IDAG's eligibility requirements, application and review processes, and grant award and disbursement procedures that ensure compliance with legal requirements and recordkeeping standards, as well as funding requirements when applicable.
- g) Ensuring fairness and equity in the IDAG model, including through eligibility requirements, cultural and linguistic diversity and competency, the application and grantmaking processes, and communications and engagement strategies.
- h) When the IDAG is activated in response to a qualified disaster, involving leadership from SBCOEM, the County EOC and/or the County Executive Office in deliberations and taking County input into how the IDAG might be focused, designed, and prioritized to meet the most pressing needs and impacts of the specific disaster in question.
- i) Designating specific staff to serve as primary liaisons to the SBCOEM on behalf of UWSBC, including the potential assignment of UWSBC staff to the Emergency Operations Center during disaster response activations.
- j) Supporting SBCOEM, the County EOC, and the County Executive Office in communications, outreach, and engagement to the broader community, and especially with populations that are vulnerable to, and/or who have been directly affected by, the impacts of disasters.

The County Office of Emergency Management will support an effective IDAG program by:

- a) Designating key staff from the Office of Emergency Management (OEM) to serve as the primary liaison(s) to UWSBC's IDAG program on an ongoing basis and devote the staff time and resources necessary to ensure that the relationships between SBCOEM and UWSBC remains strong and active.
- b) Ensuring that when a disaster (declared or otherwise) occurs that could lead to losses for individuals/households, the Santa Barbara County EOC Operational Area (OA) Liaison, SBCOEM Duty Officer or other designated EOC Management Section leader will contact leadership at UWSBC to request activation of the IDAG program. Specifically, EOC/OEM leadership should contact: Steve Ortiz, UWSBC President & CEO at 805-252-6555 or sortiz@unitedwaysb.org and/or Melinda Cabrera, Vice President, Strategic Partnerships, 760-265-0968 or mcabrera@unitedwaysb.org. In the event UWSBC leadership named in this Agreement will not be available, UWSBC will identify day-to-day and disaster response liaisons with 24/7 contact information.

- c) When the IDAG is activated, providing input, data, and information to help inform UWSBC's approach, priorities, and eligibility standards guiding the IDAG in that specific activation, as well as engaging other appropriate County Departments and OA partners based on the incident.
- d) Including information about the IDAG in the SBCOEM's Emergency Operations Plan, other relevant manuals and documents, and trainings, including the process through which the SBCOEM requests activation of the IDAG and the roles SBCOEM and other County departments might play in helping advise UWSBC about programmatic model, priorities, and eligibility requirements.
- e) When the IDAG is activated, using the County's general communications resources (ReadySBC.org, social media, etc.) and SBCOEM's Joint Information Center/PIO functions to increase community awareness about the IDAG in order to:
 - encourage people in need to apply for funding, and
 - encourage individuals and organizations that want to donate to relief efforts to consider a donation to UWSBC for the IDAG program.
- f) Assisting UWSBC in educating other County leaders and departments about the IDAG so relevant staff/departments know that it is a resource in advance of disasters and to also help identify potential applicants when the program is activated.
- g) Recognizing the IDAG program and its countywide systems as a viable model for effectively delivering additional government funded benefits/services that might become available in the wake of a disaster and, if appropriate/when applicable, considering UWSBC as a potential partner/subcontractor to assist in the delivery of those benefits to the public. The terms and conditions of such partnerships and subcontracting will be stipulated in a separate agreement.
- h) Working with UWSBC to help coordinate countywide communications relating to the IDAG to ensure consistent and accurate messaging.
- i) Recognizing that UWSBC is the leader of the IDAG program, is solely responsible for its management, and retains all decision-making authority over the program and whichever contractors, funders, and partners UWSBC chooses to involve in its implementation.