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– Evaluation Report 03/26/1971 (4 of 7)

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# TECHNICAL ASSISTANCE FUNCTION MANHOURS BY PERSON

Note: Technical Assistance Man-Hours  
Worked MPR's Compared against  
P&A Roster and CAP 14-Budget

OCTOBER

From Personnel and Assignment Roster	A Comm Svs	B Educ	C Mgt	D Hlth	E Hous ing	F Mpr	G Prog Dev	H Tr	I Meet	J Other	TOTAL	MAN HOURS BASE
STAP												
Frane.					22	19	10	21	36	7	115	176
Carter												176
Schur												176
Chickering												
Donaldson	16	2		3	21		20	5	14	9	90	176
Throne							3	28	34	53	118	
Subtotal	16	2		3	43	19	33	54	84	69	323	704
MGI/DEMO												
Archer							86		42	41	169	176
Taylor	18	12	7	6	4	5	7	4	2		65	176
Clark												176
Blaker												176
Cunningham												
Whitely	40										40	
Subtotal	58	12	7	6	4	5	93	4	44	41	274	704
CRA'S												
Archuletta										22	22	
Gurule									1		1	
Charlton						3					3	
Goff										7.5	7.5	
McInnes												
Subtotal						3			1	29.5	33.5	
CONSULTANT												
Espana												
Grand Total	74	14	7	9	47	27	126	58	129	139.5	630.5	1408

A T T A C H M E N T S

INTRODUCTION  
Attachments

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January 22, 1971

Mr. Thomas Mercer  
Regional Director  
Office of Economic Opportunity  
Arcade Plaza Building  
1321 Second Avenue  
Seattle, Washington 08101

Dear Tom:

My office will undertake a thorough evaluation of the California State Office of Economic Opportunity. As you know, the circumstances surrounding the California SEOC are unusually complex and a credible analysis of their operation is extremely important to OEO.

For these reasons, I would appreciate your freeing up Jim to lead the evaluation team. I have no question but that Jim has the unique combination of skill, experience and stature which is required to successfully complete this mission.

We are shooting for a target date of February 16 to begin our evaluation. Jim will be able to count on the fullest cooperation and assistance from all members of my staff and from Headquarters staff.

Your cooperation in this endeavor will be very much appreciated.

Sincerely,

H. Rodger Betts  
Regional Director

9/RD/TFlemming:eda

FEB 1 1971

Mr. Lewis K. Uhler  
Director  
State of California  
Office of Economic Opportunity  
800 Capitol Mall  
Sacramento, California 95814

Dear Lew:

Consistent with our policy of routinely reviewing the operations of all Office of Economic Opportunity grantees, I have scheduled a formal evaluation of the California State Office of Economic Opportunity for February 16 through 19. Specifically, the evaluation will cover the following OEO grants to your office:

CG 9093-A/1, CG 9093-A/2

CG 0364-E

CG 0364-E/2/4

The evaluation will be conducted by a team headed by Mr. James Young, Deputy Director of our Seattle Regional Office. I would appreciate your extending every courtesy to Mr. Young and members of the evaluation team. All of your staff should be available during this period to talk with the team.

As was explained in our letter of December 15 to you, the evaluation will be keyed to your grant work programs and OEO Instruction 7501-1.

We will be keeping your office fully informed as further details relative to the evaluation are developed.

Sincerely,

H. Rodger Betts  
Regional Director

CC: Mr. James Young

# EVALUATION MODEL AND QUESTIONNAIRE

## Attachments

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**OFFICE OF ECONOMIC  
OPPORTUNITY**  
EXECUTIVE OFFICE OF THE PRESIDENT  
WASHINGTON, D.C. 20503

Type of Issuance

Number

OEO INSTRUCTION

7501-1

Subject

ROLE OF STATE ECONOMIC  
OPPORTUNITY OFFICES

Date

March 25, 1970

Office of Primary Responsibility

O/SL

Supersedes OEO INSTRUCTION 1420-2  
(formerly 72-10)

Distribution

M, N, S (L1)

EFFECTIVE DATE: April 24, 1970

APPLICABILITY: State agencies receiving financial assistance  
under Section 231 of the Economic Opportunity Act.

INTRODUCTION

The states have an important and unique contribution to make in the nation's efforts to deal with the problems of the poor and in assisting the Office of Economic Opportunity with programs authorized by the Economic Opportunity Act. It is the policy of the Office of Economic Opportunity (OEO) to encourage the states to make this contribution. The OEO Director, under Section 231 of the Act, is authorized to fund State agencies to provide technical assistance to communities and local agencies in connection with Title II programs to coordinate related state activities, to mobilize state resources and to advise and assist the OEO Director. At the request of the governors, OEO provides grants to the states for the establishment of State Economic Opportunity Offices (SEOOs) to assist the states in these activities. Section 242 of the Act provides that Title II grants and contracts of assistance will be submitted to the Governor for his consideration. It has been the practice of governors to ask their SEOOs for advice and assistance in exercising their authority under Section 242 and other Sections of the Act.

The establishment and support of State Economic Opportunity Offices (SEOOs) is one way by which OEO seeks to aid state governments in their efforts to assist the poor within their boundaries. OEO expects to obtain through the SEOOs a greater understanding of the roles that the individual states can best play in OEO activities, and to encourage the states to focus more of their resources on such activities. OEO expects to receive advice from the SEOOs on how OEO can best support other state activities consistent with OEO's mission and objectives.

OEO recognizes that states differ in their constitutional, statutory and organizational patterns and that a Governor needs the flexibility to use various administrative arrangements in the organization and placement of his State Economic Opportunity Office. While the specific means of carrying out their roles will therefore differ, the State offices funded by OEO under Section 231 of the Economic Opportunity Act are expected to perform the basic functions outlined below in Sections 2, 3, 4 and 6.



## THE STATE ECONOMIC OPPORTUNITY OFFICES

1. PLACEMENT

Because of the role expected of the SEOOs in state anti-poverty activities and the need for coordination at the state level, it is desirable that the SEOO be located at a high level in the state government structure, readily accessible to the Governor.

2. ADVISOR TO THE GOVERNOR ON ANTI-POVERTY MATTERS

a. The SEOO provides the Governor with information and advice with respect to the policies and programs of OEO and other anti-poverty resources, particularly as they relate to his state. At the discretion of the Governor, the SEOO may assist him in carrying out the provisions of Section 242 of the Economic Opportunity Act concerning the Governor's authority to disapprove OEO grants and contracts of assistance, and his authority to consent to the assignment and request termination of assignments of VISTA Volunteers (Section 810(b)).

b. Upon the designation of the Governor, the SEOO Director acts as his representative on matters related to the poor. The SEOO may thus represent the Governor with respect to other state agencies, local units of government, CAAs, OEO (Regional and Headquarters), other Federal agencies and other states.

c. The SEOO Director provides the Governor, other state agencies, and the OEO Regional Offices with information on the causes and conditions of poverty in the state. (See 6-a.)

3. RESOURCE MOBILIZATION, COORDINATION AND ADVOCACY

a. The SEOO shall give priority to the mobilization and coordination of anti-poverty resources, particularly at the state level. This requires effective interagency mechanisms to assure good communication between state agencies and offices whose activities affect the poor. The SEOO should, on its own initiative, seek out and develop or assist in the development of every state, Federal, community and private agency resource (programs, expertise, funds, etc.) that can be effectively marshalled and/or coordinated to assist CAAs and other anti-poverty efforts within the state.

- b. The SEOO acts as a special advocate for the poor in state government by such activities as:

Working for representation of the poor on state committees and other instrumentalities which develop policy, provide advice or operate programs affecting the poor;

Assessing state poverty-related programs and state administrative procedures, and working to make them more responsive to the needs and desires of the poor;

Developing career opportunities for the poor within the SEOO and in other state agencies in coordination with the state civil service system; and

Employing poor persons whenever possible.

- c. The SEOO, at the discretion of the Governor, provides information and assistance to the state legislature, state planning agencies, and other state agencies with the objective of enacting and amending legislation and developing programs for the benefit of the poor. SEOOs should consult regularly with local CAAs and other representatives of the poor on legislation they feel should be recommended to the Governor or state legislature.

- d. The SEOO provides state agencies and officials, OEO grantees and the general public, with information and statistics -- using such devices as periodic bulletins, annual reports, meetings, etc. -- on the problems and needs of the poor and the programs and efforts to overcome poverty within the state.

- e. The SEOO works with the state planning agency, other appropriate state agencies, and the community action agencies of the state in the implementation of BOB Circular A-95 (Part II) which establishes improved state-level coordination of planning in multi-jurisdictional areas, as it applies to activities conducted under the Economic Opportunity Act.

#### 4. TECHNICAL ASSISTANCE TO CAAS AND OTHER OEO GRANTEES

In accordance with a Work Program approved by the Regional Office as part of the OEO refunding grant to the SEOO, the State Economic Opportunity Office provides the following technical assistance to community action agencies and other OEO grantees:

a. Provides special technical assistance where needed to Community Action Agencies, community groups, local government agencies, and other grantees or potential grantees, in developing, conducting and administering programs to alleviate poverty. At the time of grantee pre-review and when developing its own annual refunding request, the SEOO shall consult with the CAAs -- using Checkpoint Form 76 -- and with the Regional Office to determine OEO grantee needs for specialized technical assistance and to get advice on how the SEOO can assist in meeting these needs. In filling staff vacancies and when funds permit hiring new personnel, the SEOO shall give priority emphasis to the hiring and training of personnel specialized in those areas most needed by the CAAs and other OEO grantees.

b. Participates in the annual field pre-review of an OEO grantee, along with an OEO representative (Regional or Headquarters). Through the Checkpoint Procedure, the SEOO provides advice and assistance at an early or pre-review stage in the development of program proposals by CAAs and other OEO grantees. The grantee will concurrently provide the SEOO with all the required forms and information that it submits to the Regional Office before and during the pre-review. If the SEOO cannot participate in the field pre-review, or if a pre-review is not being held for a refunding or a new request, such documents and information shall be provided the SEOO at an early or preliminary stage by the grantee or applicant, along with Checkpoint Procedure Form 77. Form 77 should be signed by the SEOO on site at the conclusion of the field pre-review or no later than 15 days after receipt of the form. The SEOO shall indicate on the form, or on an attachment thereto, the specific kind and degree of technical assistance it will be able to provide the grantee, identifying those resources it will try to make available.

c. In consultation with OEO, assists grantees in taking any corrective actions, recommended by OEO as a result of evaluation and audit reports. (See 6-e.)

d. Surveys and assists in obtaining resources and funds for CAAs and other OEO grantees, available from state and Federal agencies, the private sector and other sources within the state. (See 3-a.)



- e. Sponsors or participates in training programs and workshops for CAA staff and Board members, in consultation with OEO grantees and the OEO Regional Office, with particular emphasis on utilization of state resources and personnel.
- f. Provides information and assistance to CAAs and other OEO grantees in planning, developing, and operating volunteer programs.
- g. Assists CAAs in planning and developing boundaries coterminous or complementary with other area development, planning and program units where feasible.  
(See 3-e.)

#### 5. SPECIAL PROGRAMS

The State Economic Opportunity Office may:

- a. Receive OEO and other Federal and state agency funds to operate -- or delegate the operation of -- programs which further the objectives of the Economic Opportunity Act. The Checkpoint Procedure (Form 76) must be used by the SEOO with any CAAs whose areas would be affected by the operation of OEO-funded programs. CAA concurrence is required for SEOO programs funded under Section 221 of the EOA. (This is required by the EOA, Section 221(b).) Wherever an SEOO operates a special OEO-funded program, it shall establish an advisory committee which shall include representatives of the poor and of the affected CAAs. (See OEO Instruction 6005-1.)
- b. Participate in research and demonstration programs, funded by OEO and other sources. Research and demonstration proposals in program areas where states have particular experience will be encouraged by OEO. Each Fiscal Year, OEO will reserve funds to be used for SEOO research and demonstration activities. Grants will be funded in accordance with priorities established in OEO's Research and Demonstration Plan. Priority will be given to proposals for research and demonstration activities designed to bring about meaningful changes in state and local government to assist to make their activities more responsive to the unique problems of the poor. Preference will be given to proposals which provide evidence that state or other non-OEO funding of the program is probable after a successful demonstration of one or two years. (See 8-g.)



c. Develop and carry out programs to help meet the immediate needs of migrant and seasonal farmworkers and their families, promote increased community awareness and acceptance of such families, and help them participate in special education and job training programs. (See Sections 311 and 312 of EOA.)

#### 6. ADVISOR TO OEO

a. The SEOO advises the OEO Regional Offices on the criteria established under Section 241(a) and (b) of the EOA, which are designed to achieve within the states an equitable distribution of assistance between urban and rural areas under Title II of the Act. The SEOO shall provide an annual written analysis to the Governor and to the OEO Regional Office (due July 1), highlighting the principal problems and causes of poverty in the state. This analysis includes recommended priorities and types of programs to meet those problems. The SEOO also prepares an annual three-year anti-poverty plan for the state. Copies of the SEOO analysis and plans should be sent to the Governor and other appropriate state agencies, to all CAAs in the state, and to the appropriate OEO Regional Office and to OEO Headquarters (State and Local Government Division).

b. After receipt of the annual funding guidance by the Regional Office from OEO Headquarters, each SEOO shall meet with Regional Office representatives to assist in developing the total funding plan for their particular state. A major consideration in developing the state funding plan will be the needs, priorities and analysis provided the Regional Office, described under subparagraph "a" above. When disagreements exist, the SEOO will be provided in writing (with copy sent to the State and Local Government Division) the reasons for the Regional Office position before final approval of the state funding plan. Subsequent modifications to the state funding plan require prior SEOO consultation.

c. The SEOOs shall be consulted in the development of the OEO Headquarters and Regional Training and Technical Assistance Plans. Possibilities for utilizing state resources for all areas of training and technical assistance shall be explored by the Regional Office through the SEOO. Prior to funding, comments and recommendations by the appropriate SEOOs shall be sought by the OEO funding office on all proposals for training and technical assistance projects -- whether grants or contracts -- that would operate in their states.

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d. The SEOO advises OEO on funding requests from all applicants within the state or who will operate within the state. The SEOO is to receive copies of all such official applications simultaneously with submission to the OEO Regional Office, and written comment on these applications is due in the Regional Office within 20 days after receipt. OEO Headquarters Offices, at the time serious consideration is given to funding or refunding a project, shall submit to the appropriate SEOO(s) a copy of the application or an "information packet" containing pertinent materials describing the project. SEOO comment on these Headquarters proposals, due within 15 days of receipt of the application or the information packet, is submitted to the appropriate Regional Office, which will forward the SEOO comment to OEO Headquarters, along with its own comment. The OEO funding office (Regional and Headquarters) shall consider the SEOO comments in their review prior to funding.

e. The SEOO jointly participates with the Regional Office in the evaluation of OEO-funded programs and is consulted by the OEO Regional Office in the development of standards for the evaluation of program effectiveness. (See OEO Instruction 7850-1.) An SEOO representative shall be invited to serve on all OEO staff evaluation teams which are organized to review the overall effectiveness of a grantee's program. The SEOO shall receive copies of all such evaluation reports and shall work with OEO on any necessary follow-up. (See 7-i.)

f. The SEOO monitors some or all of the OEO-funded programs within the state, if it has the staff capability and if this activity is part of the approved SEOO Work Program. Such monitoring activity shall be included in the joint written agreement on the use of field personnel (See 7-f) which shall include arrangements for periodic written reports, plus other reporting of special activity or problems, to the appropriate OEO grant office.

g. The SEOO advises the OEO Regional Offices on VISTA operations within the state. The Regional Office will consult with the SEOO in the development of an annual State VISTA Plan. This will include consultation on programs for VISTA Volunteers and on VISTA Volunteer assignments. The SEOO will assist VISTA in any coordination needs with state-operated programs. When specifically authorized by VISTA, the SEOO may assist in recruitment. The SEOO advises the Regional Office on special problems in the state that might develop as a result of the activities or presence of VISTA Volunteers, and assists the Regional Office in resolving such problems.

h. The SEOO advises OEO on procedures and programs which will promote state agency participation in carrying out the aims and objectives of the Economic Opportunity Act.



i. The SEOO advises and assists OEO in identifying problems posed by Federal and state statutory or administrative requirements that impede state-level coordination of OEO-related programs, and in developing methods or recommendations for overcoming those problems. This is achieved through continuing relations with both OEO Regional Offices and OEO Headquarters, and through the consultation provisions of BOB Circular A-85.

7. REGIONAL OFFICE RESPONSIBILITIES TOWARD THE SEOOS

a. The responsibility for application review, grant approval and program monitoring of SEOO activities funded under Section 231 of the Economic Opportunity Act is the responsibility of the OEO Regional Offices. Regional liaison and coordination with the SEOO Directors (including VISTA, Legal Services and Health Affairs) shall be focused in the Office of Governmental and Private Sector Relations under the Regional Director.

b. The Regional Office shall encourage and assist each SEOO to develop an annual Work Program (as a part of its funding request), which takes full advantage of SEOO staff capabilities; and which is responsive to the main missions and functions under Sections 2, 3, 4, and 6 of this Instruction. Consideration should be given to the diversity of the states, recognizing that different approaches are appropriate in carrying out these basic functions.

c. The Regional Office is responsible for evaluating the effectiveness of the SEOOs, as OEO grantees, in implementing their annual Work Program (Form 7-e) and in carrying out the basic objectives outlined in their "Plans and Priorities" (Form 81-a). Whenever possible, the evaluation team should include a staff member of another SEOO. The Regional Office shall work jointly with the SEOOs to strengthen the SEOO staff capability to carry out their Work Programs and to overcome any weaknesses that may be revealed by these evaluations.

d. Regional Offices are responsible for ensuring that the SEOOs are consulted concerning OEO Regional Office plans and priorities with regard to OEO grantees within their respective states. When flexible or other OEO funds become available for additional programs in a given state, the Regional Office shall first consult with the SEOO before committing such funds.



e. Regional Offices are to involve their SEOOs formally in the development of the state funding plans (6-b) and on the annual Training and Technical Assistance Plan as it pertains to the state (6-c); and they shall provide copies of such plans when approved to the appropriate SEOOs, and to the Division of State and Local Government, Office of Operations. They shall ensure that the SEOOs are consulted in advance and notified upon funding on all Section 230 (Training and Technical Assistance) grants and contract awards, approved by the Regional Office.

f. The Regional Offices shall jointly work out a written agreement with each SEOO -- dividing responsibilities as staff capability and interest dictate -- to assure a maximum of coordination and a minimum of overlapping of activities and functions carried out by their respective field representatives. This agreement shall be jointly reviewed at least annually to effect improvements.

g. The Regional Offices shall invite -- with adequate advance notice -- the appropriate SEOO to all "pre-reviews" held with other OEO grantees in the state. They are responsible for seeing that the completed Check-point Procedure Form 77 is included in all funding requests received by them and will not begin an application review unless the completed Form 77 is included or unless the applicant provides evidence that the SEOO has not responded. (See 4-b.)

h. The Regional Office shall ensure that a copy of all applications and requests for OEO funds, as well as requests for reprogramming, submitted to the Regional Office for approval is sent by the applicant simultaneously to the appropriate SEOO for information and comment. The Regional Office shall send written notice to the appropriate SEOO(s) upon the receipt of all applications for funding and reprogramming requests. Written comment by the SEOO on funding requests -- which is due within 20 days of SEOO receipt of the application -- shall receive serious consideration and response by the Regional Office prior to funding. (See 6-d.)

i. The Regional Office shall invite the SEOOs to participate in all OEO staff evaluation teams which it organizes to review the overall effectiveness of a grantee's programs, and shall share with the SEOOs the findings and recommendations of such team

evaluations immediately upon completion of the written report. The Regional Office, in consultation with the SEOO and the grantee, shall jointly work out a follow-up procedure and plan to ensure implementation of OEO's recommendations. (See 6-e.)

j. The Regional Office will work through -- or in consultation with -- the SEOO in any of its dealings with other state agencies, unless it has arranged for a by-pass agreement with the SEOO for specific types of contacts elsewhere in the state government.

k. The Regional Directors, and the SEOO Directors in each Region, shall jointly plan and participate in regular meetings -- to be held at least quarterly -- to discuss mutual problems, exchange information and explore new and innovative ways to increase their effectiveness in working together. Notice of such meetings shall be sent the State and Local Government Division of the Office of Operations, so that a representative may attend when practicable.

l. The Regional Office shall forward to the State and Local Government Division, Office of Operations, a copy of all executed SEOO grant packages and a copy of all evaluation reports on the SEOOs.

8. OEO HEADQUARTERS RELATIONSHIPS WITH THE SEOOs

a. The State and Local Government Division of the Office of Operations shall be the primary office in OEO Headquarters for dealing with the SEOOs. This Division is to maintain a nation-wide overview of SEOO operations and shall work in close coordination with the Office of Governmental and Private Sector Relations of each Regional Office.

b. OEO Headquarters shall seek to develop and strengthen the effectiveness of the SEOOs in the anti-poverty effort and to encourage OEO consultation, coordination and cooperation with the states.

c. The Office of Operations shall foster an exchange of information and program experience among all the SEOOs and Regional Offices. It will sponsor, and jointly plan with the SEOOs and the Regional Offices, an annual national conference for all SEOO Directors.

- d. OEO Headquarters shall be responsible for keeping the appropriate Regional Office informed of negotiations, requests, etc., from SEOOs, in the Regional Office area of responsibility. It shall consult with, coordinate, and request guidance from the Regional Office on matters affecting SEOOs within the Region's area of responsibility.
- e. In consultation with the Regional Offices and the SEOOs, OEO Headquarters will ascertain national and inter-regional training and technical assistance needs of the SEOOs. It will assist them in meeting such needs by the use of OEO personnel, or through contractors.
- f. The Office of Operations is responsible for monitoring the Checkpoint Procedure system with the SEOOs which is to be used by all funding offices in OEO Headquarters. (See 4-b.)
- g. The Office of Operations will work with OEO's Office of Program Development and the Regional Offices in the solicitation and review of new SEOO proposals for demonstration programs. (See 5-b.) SEOOs interested in developing demonstration proposals should ordinarily consult first with the appropriate Regional Office and then contact the State and Local Government Division. The Office of Program Development will provide assistance, review and decide on approval of SEOO Research and Demonstration grants. When the SEOO makes direct contact with the Office of Program Development, the SEOO is responsible for so informing the Office of Operations.
- h. The Office of Operations shall assist the SEOOs in their dealings with the Headquarters offices of other Federal agencies.
- i. Each OEO Headquarters funding office is responsible for seeing that one copy of every official application (or an "information packet" summarizing the application), submitted to that office for approval, be sent to the SEOO in the state the applicant is located (and to any other SEOOs of states in which the program is to operate) for information and comment, as soon as the funding office has the application under serious consideration. Written comment by the SEOO -- which is due in the Regional Office with 15 days of SEOO receipt of the application -- shall receive serious consideration by OEO Headquarters prior to funding. (See 6-d.)



9. SEOO RESPONSIBILITIES AS OEO GRANTEES

a. When a state applies for funding from OEO under Section 231 of the Economic Opportunity Act, it shall use the forms and follow the application procedures for SEOOs outlined in OEO Notice 6710-2 of February 26, 1969 (until revised forms and requests for funding procedures are issued by OEO). Refunding requests are due in the Regional Office no later than 60 days before the end of the SEOO's Program Year. Five copies are required by the Regional Office; a sixth copy should be forwarded directly to the State and Local Government Division, Office of Operations.

b. The state's share for funding under Section 231 shall be a minimum of 20 percent of the total cost of the operation in cash and/or in kind.

c. Preferably 120 days, but no later than 90 days, before the end of its Program Year, the SEOO's "Plans and Priorities" (Form 81-a) is due in the OEO Regional Office. The SEOO should submit three copies to the Regional Office and one copy directly to the State and Local Government Division, Office of Operations.

d. As part of its annual refunding request, the SEOO must include a progress or self-evaluation report on its activities for the previous year, giving a candid assessment of its successes and failures in meeting its Work Program.

i e. The SEOO shall submit a MIS Quarterly Narrative Report on its activities, related to the approved Work Program, to the OEO Regional Office, with a copy to the State and Local Government Division, Office of Operations. (The MIS Quarterly Statistical Report is no longer required of the SEOOs.)

f. The SEOO draft Work Program (Form 7-e) shall be checkpointed with all the CAAs in the state for comment and such signed Checkpoint Forms (76) included as part of the annual SEOO refunding request. (See 4-a.)

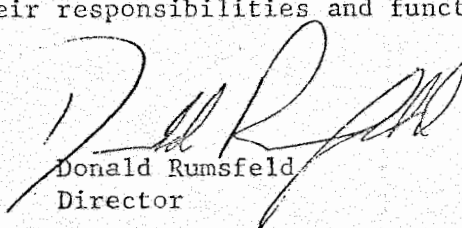
g. The SEOO shall have an annual financial audit conducted, in accordance with OEO guidelines. It shall cooperate with monitoring and evaluation visits by OEO personnel or by OEO contractors.



h. SEOO acceptance of an OEO-approved "grant package" is an agreement by the SEOO to perform the work stated in the SEOO Work Program submitted as part of the funding request. Unsatisfactory performance may be cause for OEO to re-evaluate and lower the future funding level of a SEOO.

i. As OEO grantees, the SEOOs shall comply with all applicable OEO Instructions. SEOO personnel policies and procedures shall be consistent with CAP Technical Assistance Memorandum 26-A of April 3, 1967. When OEO personnel policies and procedures are in conflict with state law and personnel regulations, a mutually acceptable solution shall be spelled out in a written agreement between the SEOO and the OEO Regional Office and incorporated in the SEOO grant.

j. SEOOs are expected to carry out pre-service and in-service training programs to upgrade the skills of their staffs, and all SEOO refunding requests shall include specific plans for staff in-service training. Whenever funds permit, the SEOOs will be given the opportunity by OEO to strengthen their staff capabilities to carry out their responsibilities and functions more effectively.

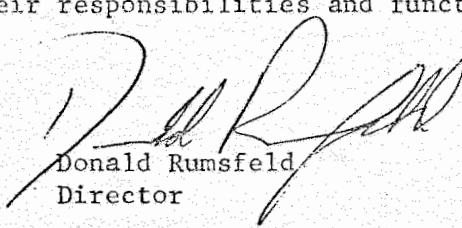


Donald Rumsfeld  
Director

h. SEOO acceptance of an OEO-approved "grant package" is an agreement by the SEOO to perform the work stated in the SEOO Work Program submitted as part of the funding request. Unsatisfactory performance may be cause for OEO to re-evaluate and lower the future funding level of a SEOO.

i. As OEO grantees, the SEOOs shall comply with all applicable OEO Instructions. SEOO personnel policies and procedures shall be consistent with CAP Technical Assistance Memorandum 26-A of April 3, 1967. When OEO personnel policies and procedures are in conflict with state law and personnel regulations, a mutually acceptable solution shall be spelled out in a written agreement between the SEOO and the OEO Regional Office and incorporated in the SEOO grant.

j. SEOOs are expected to carry out pre-service and in-service training programs to upgrade the skills of their staffs, and all SEOO refunding requests shall include specific plans for staff in-service training. Whenever funds permit, the SEOOs will be given the opportunity by OEO to strengthen their staff capabilities to carry out their responsibilities and functions more effectively.



Donald Rumsfeld  
Director

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CAP FORM 81-a "PLANS & PRIORITIES"

California State OEO, June 1970

I. State OEO Planning

A. What is the State OEO planning process?

*By EO 12812  
which removed  
from within?*

A prescribed cyclical set of ordered activities comprises the current SEOO planning process. SEOO completes the following sequence of planning steps:

1. Setting of goal or goals; *How*
2. Determination of needs;
3. Development of objectives for the ensuing fiscal year;
4. Assignment of priorities to the objectives;
5. Creation of a work program which describes activities to carry out the objectives and allocates available resources;
6. Continuous evaluation of the progress of the program of work;
7. Reconsideration of any of the prior steps 1 - 4;
8. Redirection of the program as needed.

SEOO expects particularly significant contributions\* to the effectiveness of its planning activities in 1970-71 through:

1. The qualitative and quantitative improvement in information about local needs and grantee capabilities which an expanded, outstationed, and better trained field *How* analyst staff can remit to headquarters.



2. An increased understanding of the nature and potential use of national, state, and local anti-poverty resources (public and private) to be derived from SEOO's direct and contract employment of several specialists.
3. The inclusion of a staff assistant for planning whose principal responsibilities will be the systematic planning for and execution of the planning process described above, and creation of a statewide anti-poverty plan. *(Commission)*
4. Substantially expanded capacity, derived from item (3) combined with the research and statistical capabilities of DHRD, to create a poverty information module for SEOO, grantee, and legislative use in assessing needs, assigning priorities, and allocating resources to decrease poverty.

B. What other state agencies have responsibilities in planning of Programs in respect to poverty?

Agencies in state government with a common interest in socio-economic planning include the following:

*(not the same)*

- Social Welfare
- Mental Hygiene
- Rehabilitation
- Industrial Relations
- Public Health
- Corrections
- State Office of Planning
- Health Care Services
- Youth Authority
- Human Resources Development, which includes:
  - State Office of Economic Opportunity;
  - Commission on Aging;
  - former Department of Employment and Service Center Program



The California State Office of Economic Opportunity is the only entity whose anti-poverty interests cut across all state agency lines.

C. How will SEOO work with the above agencies for coordinating state planning approach?

With the recent implementation of the Human Relations Agency and DHRD, a state organizational framework has been established to permit maximum coordination between State OEO and the above agencies for a more coherent state planning approach.

The State OEO staff will represent the State Office of Economic Opportunity to other state agencies singly and jointly in appropriate planning meetings, and will work with their counterparts in other state agencies to assure that all have access to comparable, comprehensive, and current data on poverty, and to assure a coherent and unified multi-agency approach to interpretation and use of information on poverty and anti-poverty resources.

II. SEOO Priorities

A. What are the SEOO's priorities for the coming year?

To increase the scope, accuracy, and reliability of information on conditions of poverty and on the availability and use of all anti-poverty resources in California, for state and local planning, funding, coordinative, and legislative use, as well as in projects to stimulate public awareness of the conditions of poverty.

To provide, or arrange and coordinate the provision by other sources of, greatly improved multi-specialty technical assistance to grantees and other appropriate agents in the California anti-poverty effort.

To encourage both the already indicated trend of California governmental officials toward more involvement in anti-poverty programs and their increasing interest in the efficient, well-coordinated application of state governmental and private resources to the problems of poverty in California.

To gain the capacity to "mobilize" business, volunteer, and foundation resources in a systematic, consequential way to promote economic opportunity.

B. What are SEOO's goals for the coming year?

In concert with the mandates of the Economic Opportunity Act:

1. To provide review of and assistance to grantees in greater depth by an increased and better trained analyst staff, with the object of providing sufficient intensity and continuity of state-CAA relationships to resolve as many areas as possible of mutual concern about programs prior to the refunding-review stage.
2. To provide direct technical assistance to CAAs and single purpose grantees in the fields of management

(including fiscal management), collection and maximized use of information on poverty and opportunity, and other areas as local needs dictate.

3. To develop through special programs and contract services new assistance and demonstration projects in the use of volunteer services, excess property, and community college resources; in programs of technical aid to Indians, disadvantaged youth, and Head Start-day care projects; and in other specialities as indicated.
4. To complete the adoption of a systematic approach to SEOO planning and management by objectives.
5. To create an information module in conjunction with HRD which enables the comprehensive and systematic collection, compilation, storage, retrieval, and dissemination of data on poverty and on anti-poverty resources in California.

C. What are SEOO's goals for the next three years?

To consolidate those gains made to date in the anti-poverty effort.

To accelerate the spin-off of effective anti-poverty programs to established social agencies.

To maximize public awareness of the problems of poverty and participation in their solution.



To encourage new public and private efforts for the  
prevention of poverty.

III. SEOO Project or Program (Directly administered by SEOO, if any.)

Not applicable; State OEO does not directly plan to administer anti-poverty programs.

IV. The SEOO within the State Government

- A. Describe the organizational structure and placement of the SEOO within state government. If SEOO director does not report directly to the Governor, provide the titles and relationship of all intervening officials.

See Attachment 2, Organizational Chart, and Assembly Bill 1463, The Human Resources Development Act of 1968, (Chapter 1460, Statutes of 1968).

- B. Has this changed during the past year?

No.

- C. Describe the existing formal and informal arrangements for the coordination of state agency activities and programs related to anti-poverty efforts. Are there plans to modify or improve this?

The total framework for accomplishing this is prescribed by provisions of Human Relations Agency and Department of HRD. The requested augmentation in professional capabilities beyond those of the existing skeletal review staff is intended to provide the basis for meaningful attempts at coordination of anti-poverty efforts.

- D. State how the SEOO will help mobilize all possible resource at the state level and promote the participation of state agencies.

Through the mechanism provided by Assembly Bill 1463.

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- 3
- E. Indicate to what degree the SEOO is coordinating with other federal technical assistance-type programs operating at the state level (such as HUD's 701, Title VII and Title IX; HEW's Title I; USDA's TAP, etc.). How can this coordination be improved?

The SEOO is coordinating its interests to the maximum feasible degree with other federal technical assistance programs through close liaison with the CAA operations and the regional and district headquarters of the federal programs.

Not Logical - explain

The coordination of SEOO interests in the indicated programs will be strengthened to the degree that additional staff availability will improve the quantity and quality of linkage of operating programs in California.

- F. How will the SEOO promote within the state government greater use of new types of services and innovative approaches in attacking causes of poverty?

Answered in I-C.

V. Designation by Governor

- A. Describe how and when the Governor designated your office to be the recipient of state agency assistance under Section 231, Title II of the Economic Opportunity Act.

The Governor designated this office July 16, 1965, pursuant to state enabling legislation which created the State Office of Economic Opportunity and the California Migrant Master Plan. Further provision to continue operation of this office is authorized by the Human Resources Development Act of 1968 as previously described (AB 1463; Chapter 1460, Statutes of 1968).



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B. Has the SECO also been designated to advise the Governor concerning his approval authority under Section 242 of this Act?

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Yes.

FUNCTIONS AND ORGANIZATION

- A. Give a breakdown of existing (authorized and actual) SEOO staff -- both clerical and professional -- stating titles, responsibilities and functions of each. Describe how the staff is organized.
- 

See Attachment 1 - SEOO Current Organization Chart

See Attachment 2 - SEOO Current Job Descriptions

- B. What changes are proposed in the SEOO staff for the next Program Year in size, functions and organization?
- 

(See foregoing CAP 81-a Sections II and IV)

A series of policy developments in the Federal Office of Economic Opportunity (recently summarized in OEO Instruction 7501-1) has recognized and reaffirmed "the important and unique contribution states (can) make in the nation's efforts to deal with the problems of the poor and in assisting the Office of Economic Opportunity with programs authorized by the Economic Opportunity Act." Based upon the absolute numbers of disadvantaged people in California vs. other states, as well as upon the ratios of SEOO budgets to EOA program funds for which SEOOs have responsibility in other states, the existing California budget is disproportionately low by a factor of ten or twenty (depending on the particular comparison).

The California State Office of Economic Opportunity proposes substantial and significant improvements in its capabilities to perform a broader and more effective role in California anti-poverty activities. Coupled with renewed cooperative arrangements between SEOO and the Regional OEO, and with

improved coordination of State governmental resources which result from implementation of the State HRD reorganization, the proposed changes in SEEO staff size, function, and organization promise SEEO an enhanced opportunity to make an important contribution to the anti-poverty work envisioned in the Economic Opportunity Act.

Per request of OEO-Western Regional California SEEO will implement staff improvements in two ways:

- (1) The augmentation of the existing SEEO supervising and review personnel complement through an increased "regular guideline" grant and
- (2) The addition of key staff and technical assistance specialists through a demonstration grant. Basic staff changes to be effected through both funding arrangements are outlined below, diagrammed in the "Chart of CSEEO Organization: PY 'E'" (attachment 3), and subsequently elaborated in the various appropriate sections of this work program and in the work program of the demonstration grant proposal.

Expanded regular program:

- (1) An addition of eight Community Program Analysts to the existing eight (currently termed "Community Action Representatives") to more nearly satisfy the current (and growing) assistance and review requirements of the state's local grantees, particularly to enable more precise and consistent diagnosis of grantee programs and problems in advance of the



formal review refunding period, in carrying out the Governor's tasks of program coordination and review. A more substantial and better trained staff of analysts will permit the cooperative resolution of differences with grantees and other local community participants in anti-poverty programs on a regular, consistent and pre-crisis basis, and will encourage more effective diagnosis of CAA needs for specialist technical aid which can be applied upon request by the grantee and Analyst working together. One Analyst will be assigned on a long-term full-time basis to an existing grantee by arrangement with the grantee and the Regional Office of Economic Opportunity.

- (2) An addition of a Staff Assistant to aid the SEOO top management in planning, and in the administration and coordination of the regular, demonstration, STAP and other programs.
- (3) Establishment of two positions for coordination of volunteer VISTA activities and intergovernmental liaison work to fulfill the objectives of state, public, and private sector resource mobilization described in OEO Instruction 7501-1.

Demonstration project for technical assistance and program coordination: (see separate grant work program)

- (1) Establishment of SEOO technical assistance capabilities in grantee personnel, fiscal and program management by the employment of four Management Consultants who

will be prepared to both diagnose special management problems and implement management improvements upon request by California grantees.

- (2) Development of planning, research, information and functions per Instruction 7501-1 through employment of the Staff Assistant for planning (see (2) under Regular Program above) and increased use of research and statistics capabilities within HRD.
- (3) Hiring of Specialist Coordinators for California's Indian Programs and California's Childhood Development Programs.

STAP Program:

Beginning May 1, 1970, OEO funded four STAP Specialists to OEO, who will give primary attention to the long-term special technical assistance needs of rural grantees.

- C. Does the SEOO now have -- or does it plan to have next year, personnel outstationed throughout the state? (If so, specify where, functions, etc.) If answer is yes, list the advantages and disadvantages over a single centralized staff.

SEOO plans to outstation several Community Program Analysts in Los Angeles and in the San Francisco Bay Area. Reducing the physical distance between the Analysts and the grantees for which the Analysts have responsibility complements the reduction through added SEOO staffing in the number of grantees each Analyst must service -- offering SEOO the opportunity to meet grantees' long articulated demands for coverage with greater depth and continuity by SEOO representatives. Each outstationed group will include a Senior Analyst who will be responsible for assuring the close coordination of field review and assistance work. A schedule of

frequent field-headquarters contacts already developed will assure that the advantage of improved efficiency is without cost in central coordination and control.

What management improvements are planned for the coming year?

On the basis of recent favorable experience, SEOO will maintain the general pattern of intraorganizational relationships among Community Program Analysts described in this section for the Program Year E proposal. To accommodate the expansion in field assistance and review capability provided by the added professional Analysts and their outstationing, each Analyst will be assigned to assist and serve grantees in one of three (San Francisco, Los Angeles, and Sacramento) SEOO administrative regions under the supervision of a Senior Analyst for the region.

Further extensions of the principles of management by objectives will be integrated in SEOO's work as a management and planning device, under the technical guidance of the Management Improvement-Cost Reduction (MICR) Section of the State Department of Human Resources Development.

#### PERSONNEL ADMINISTRATION

A. What problems have there been -- and are anticipated next year -- in filling vacancies, in salaries, and other personnel matters?

None in either case.

B. Will the SEOO be able to operate in accordance with approved OEO Personnel Policies and Procedures? List any exceptions and explain the necessity for such exceptions.

Yes, no exceptions.

C. What career development programs are planned?

The addition of the positions of Supervising Community Program Analyst for each of two administrative regions offers



career development opportunities to SEOO staff. State OEO also will have the added capability to plan and implement a career development program through its expanded TA services operation. What staff training is needed and how does the SEOO propose to meet this need?

SEOO has provided training on a regular basis to existing staff. Addition of new staff will require introductory and supplemental training which will be given with the cooperation of the State Training Division and other State agencies, particularly the HRD sections (fiscal research, legal and management). SEOO may also utilize training services of the State College and University systems. A possibility exists for some joint training of staffs of SEOO and Western Regional OEO. Regular in-service staff training also will be provided at regular intervals during the Program Year. A staff member has been appointed to work with other agencies and groups to develop a comprehensive and coherent training program for SEOO staff for Program Year "E".

*help  
train  
don't*

#### COORDINATION :

- A. Checkpoint Procedures: Describe how the checkpoint procedure system which the CAAs (Form 77) is working, and how the SEOO plans to improve its participation in the procedure. Does the SEOO recommend changes in the system?

Improved working relationships -- including greater participation by SEOO staff in grantee pre-review and planning meetings -- with Regional representatives over the past year have begun to indicate a better functioning of the checkpoint system. SEOO expects this trend to continue. Where SEOO is permitted full

participation in grantee pre-review activities, and the grantee submits Form 77 on time, the checkpoint procedure functions well.

- B. How is the checkpoint procedure working for OEO/HQS - approved programs, and how can this be improved?

The procedure is working well.

Negotiation in advance of the Governor's thirty day sign-off period has enhanced the effectiveness of the checkpoint procedure.

Further emphasis on advance negotiations is desirable.

- C. What plans does the SEOO have to advise and assist OEO on developing procedures and programs which would promote and increase state agency participation in the anti-poverty effort? (What are the problems and opportunities?)

SEOO has advised OEO of its expanded roles in the anti-poverty field (as outlined in recent HRD policy statements and detailed in foregoing sections of this application), which have the full interest and support of top HRD officials, the Office of the Governor of the State, and legislators, e.g., the HRD Act of 1968.

- D. As "advocate for the poor" at the state level, how does the SEOO:

1. Plan to employ poor people on the SEOO staff, or use as consultants?

The opportunity to employ poor people on the SEOO staff does not now exist. This is an area which State OEO expects to explore.

2. Plan to promote the maximum feasible participation of the poor in planning, coordination, and evaluation of other state agency operations and programs which affect the poor?

Through the establishment of a State OEO staff of sufficient size to devote time to planning, and an improved information, research and dissemination system, SEOO will gain the capacity to encourage the actual employment of

*What this  
Appended*

poor people by other agencies, and the participation of poor people in the development, implementation and review of programs which serve them.

3. Encourage and work toward the development of career opportunities for the poor with other state agencies?

The existing SEOO linkage with State HRD, particularly with its Job Development, Training and Placement Division, will allow SEOO to express with greater impact its concern for development of career opportunities and revised entry level opportunities for low-income people.

- E. Does the SEOO have any proposals to assist OEO on Job Corps and/or VISTA programs?

A Volunteer Coordinator will be employed to mobilize and coordinate anti-poverty volunteers and VISTA programs in California.

#### IV. TECHNICAL ASSISTANCE

- A. Describe the kind and degree of technical assistance to be provided the CAAs during the coming Program Year and what changes and improvements are planned over the current year.

*Submitted to  
Program*

The acquisition of funding for the state STAP program and the proposed addition of four Management Specialists, eight Field Analysts, and three Special Programs Coordinators offers SEOO an impressive opportunity to provide higher quality multi-speciality technical assistance to CAAs in the coming Program Year. The cooperation of HRD's units in this year's program will allow SEOO to draw on vast and proximate funds of specialist talent in fields of critical importance to CAAs and in addition should provide SEOO an opportunity to promote its



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concerns within other state agencies. Furthermore, SEOO plans to submit to OEO in the near future two or more independent applications for pilot projects funds to demonstrate new forms of technical aid to grantees. Still other changes and improvements will be designed as program adjustments are made through a new SEOO TA-contract services concept.

- B. Identify the number of CAAs in the State, and list the ones which will be served. Provide a narrative statement on why these CAAs were chosen.

SEOO, in regard of the mandate of the Economic Opportunity Act of 1964, serves all the State's CAAs. These are 42 CAAs and numerous single-purpose grantees, which have been, and will continue to be, served. In addition SEOO serves the California Inter-tribal Council and Quechan Indian CAP in Imperial County. (Total 44 CAAs).

- C. How does the SEOO plan to assist the CAAs in locating non-OEO resources and funds in the next Program Year?

Integration of SEOO in the Department of Human Resources Development promises to provide SEOO up-to-date information on State and other public resources which might be available to CAAs. SEOO plans to convey such information as appropriate to CAAs through its Analyst and Specialist staff, and other media.

SEOO intends to develop as soon as possible one or more professional positions with responsibility for a unified, systematic approach to the mobilization of private sector resources.

- D. Does the SEOO propose a better way to coordinate with the OEO Regional Office and its field representatives in the provision of technical assistance to the CAAs?

Recent published guidelines, as well as a continuing series of meetings between OEO and SEOO staffs on the provision of technical assistance, have established an improved basis for coordination of technical assistance activities. The two agencies have agreed that State OEO will increasingly assume the role of providing, or coordinating the provision of, technical aid to grantees within the state, and SEOO is fully prepared to cooperate with Regional OEO in developing policy for an efficient technical assistance effort. Continuous joint staff cooperation in the field between the two offices is encouraged by SEOO.

- E. What specific activities are planned to assist CAAs coordinate their programs with other related programs to meet the multi-jurisdictional planning requirements of OEO Instruction 6321-2?

Each SEOO professional staff member has received or will receive instruction in these requirements to enable him to help CAAs meet their obligations.

- F. What training and orientation does the SEOO propose to provide the CAA staffs and boards?

State OEO expects that the aforementioned restructuring of Analysts' field assignments will increase the time available for the Analyst's training and orientation to CAA staffs and boards, upon request by CAAs.

- G. Will the SEOO serve as a central personnel "clearinghouse" for the CAAs looking for qualified staff? Any changes from the current situation?

The State OEO has served and will continue to serve as a central personnel "clearinghouse" for the CAAs, upon request.



- H. Describe how the SEOO plans to change or improve its efforts to inform the news media and the public of the needs, problems, and programs of the anti-poverty effort.

It is intended that work of the Staff Assistant for Planning and the Intergovernmental Liaison Coordinator (previously described in several sections of this work program, in the attached CAP 81, in the demonstration proposal and in appended documents) will provide the nucleus of a public information and education program to be developed by SEOO in the coming Program Year. The Public Information Section of HRD also has offered assistance to SEOO in this field.

#### V. OPERATIONS

Describe the programs the SEOO plans to operate, if any, during the next program year -- include sources and amounts of funds, objectives, target populations, etc. (Answer also if SEOO, as principal grantee, delegates this program to be administered by another organization.)

SEOO has no plans to operate programs in the coming year.

SEOO EVALUATION QUESTIONNAIRE