

Treasurer-Tax Collector

2024 Equal Opportunity Plan

Reporting Period: January – December 2023



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Section 1
Department Head's Acknowledgment & Commitment to the
2024 Departmental Equal Opportunity Plan

The Monterey County Board of Supervisors adopted an ordinance reaffirming their long-standing commitment to providing equal opportunities for all and preventing and eliminating unlawful discrimination. The Board of Supervisors values providing an open and empathetic communication channel for County officials and employees, applicants for employment, and business relationships with the County. Through the adoption of the Nondiscrimination, Sexual Harassment, Reasonable Accommodation, and the Language Access and Effective Communication Policies, the Board of Supervisors reaffirms its expectation that each County official and employee is responsible for maintaining a workplace that is free from unlawful discrimination, harassment, and retaliation.

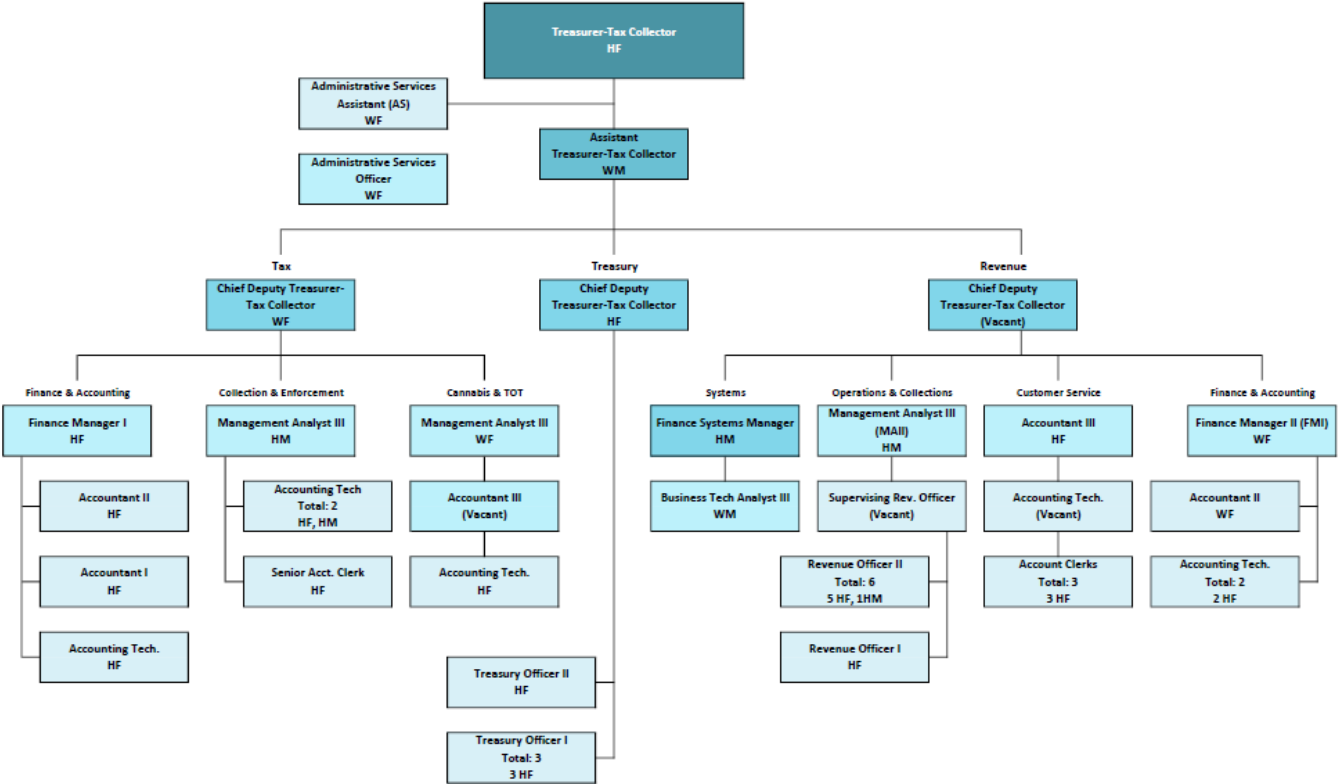
As Department Head, my signature below verifies the accuracy of this report and affirms my commitment to equal opportunity and civil rights, as outlined in County policies and ordinances.



Mary Zeeb
Treasurer-Tax Collector

Section 2 Organizational Profile

OFFICE OF THE TREASURER-TAX COLLECTOR



Self-reported Gender and Ethnicity:

M – Male F – Female

AA – African American

AI – American Indian/ Alaskan Native

API – Asian/ Pacific Islander

H – Hispanic

W – White other than Hispanic

In this Organizational Profile, the elected department head is included in the total filled position count. However, the department head’s gender and ethnicity are not included in the department-wide demographics and workforce analysis data.

Section 3

Department's Workforce Analysis Chart (MC-HRM-EO-0003)

The office of the Treasurer-Tax Collector (TTC) divides its workforce of 37 current staff members across the following seven job groups:

- Group 01 – Management II
- Group 02 – Management I
- Group 03 – Professional – Administration
- Group 13 – Paraprofessional – Technician I
- Group 14 – Paraprofessional – Technician II
- Group 17 – Office Clerical II
- Group 18 – Office Clerical I

Within these job groups, the department has established a diverse workforce in which inclusionary growth, skill development, and training are paramount across all demographics. The departmental workforce analyses identify the TTC's current employee workforce based on race, ethnicity, and gender, according to the following comparisons:

- Analysis 1 – Minority Demographic Comparison by Job Group
- Analysis 2 – Department-wide Demographics by Race/ Ethnicity
- Analysis 3 – Female demographic Comparison by Job Group
- Analysis 4 – Department-wide Demographics by Gender

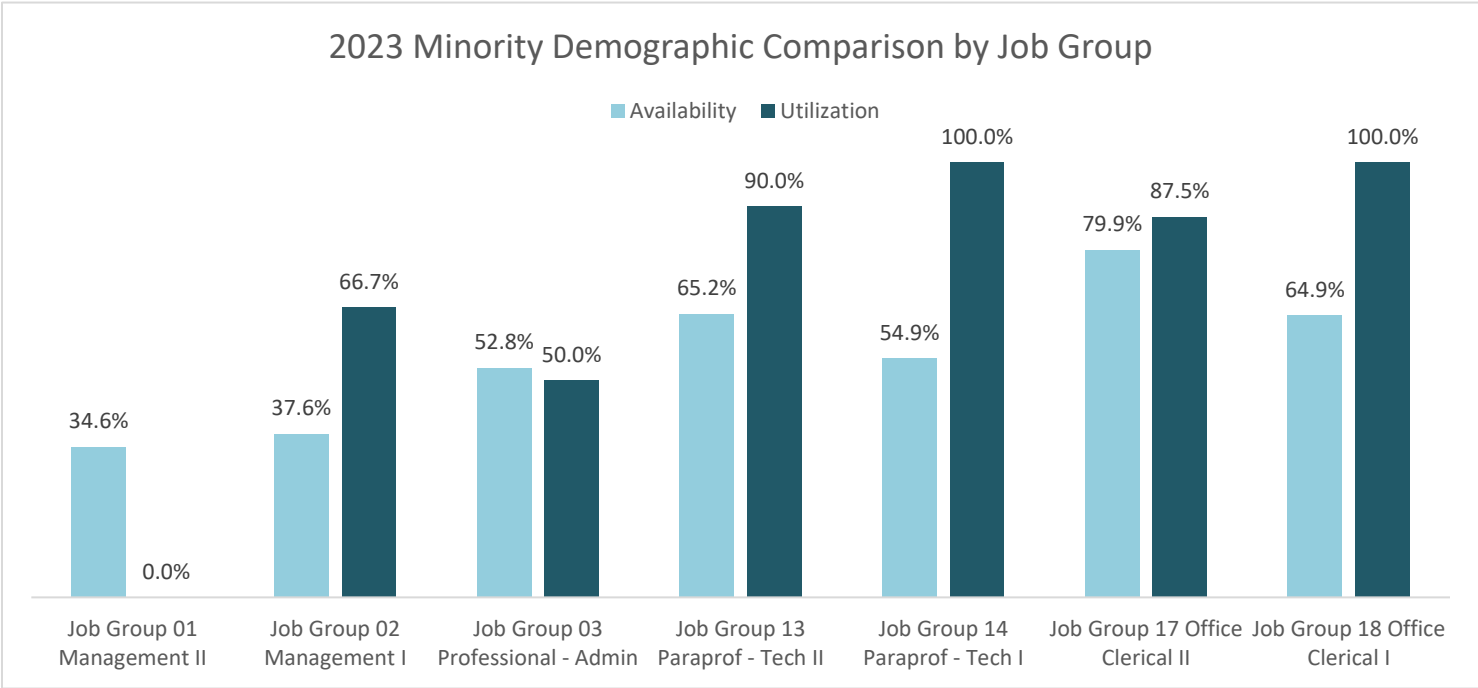
All racial, ethnic, and gender demographics are self-reported. In the instance of female and minority demographics, as seen in Analyses 1 and 3, within job groups, each demographic is compared against a minimum threshold. In the instance of gender and race/ethnicity demographics, as seen in Analyses 2 and 4, each demographic is defined as a percentage of the entire department. Except where specified, all data represented for the 2023 year is captured between January 1 and December 31, 2023.

Workforce Analysis 1 – Minority Demographic Comparison by Job Group

In this analysis, within each job group, minority employees are represented in comparison with the department’s overall workforce. Minority groups, by race and ethnicity, are African American, Hispanic, Asian/ Pacific Islander, and American Indian/ Alaskan Native.

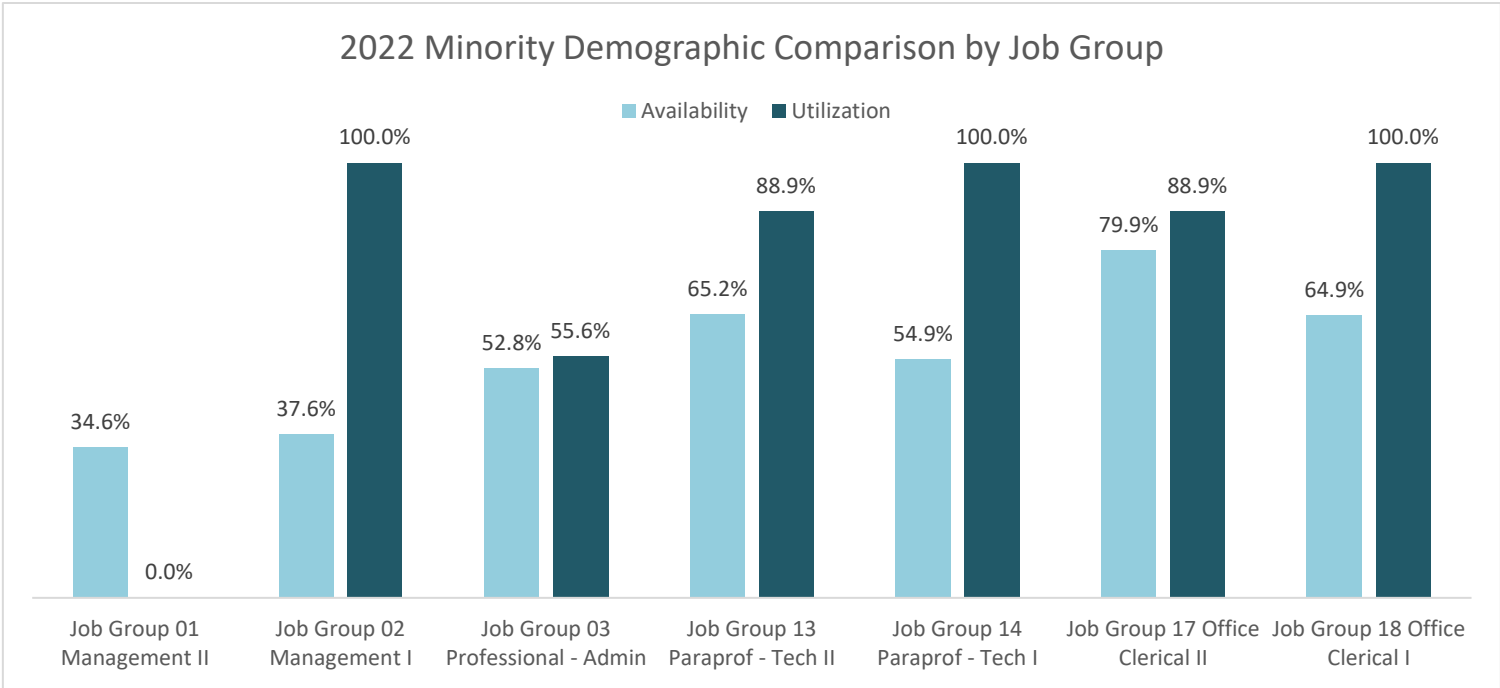
2023 Minority Demographic Comparison by Job Group

	0 Minority 1 White	2 Minority 1 White	4 Minority 4 White	9 Minority 1 White	4 Minority 0 White	7 Minority 1 White	3 Minority 0 White
	1	3	8	10	4	8	3



2022 Minority Demographic Comparison by Job Group

	0 Minority 1 White	2 Minority 0 White	5 Minority 4 White	8 Minority 1 White	3 Minority 0 White	8 Minority 1 White	6 Minority 0 White
	1	2	9	9	3	9	6



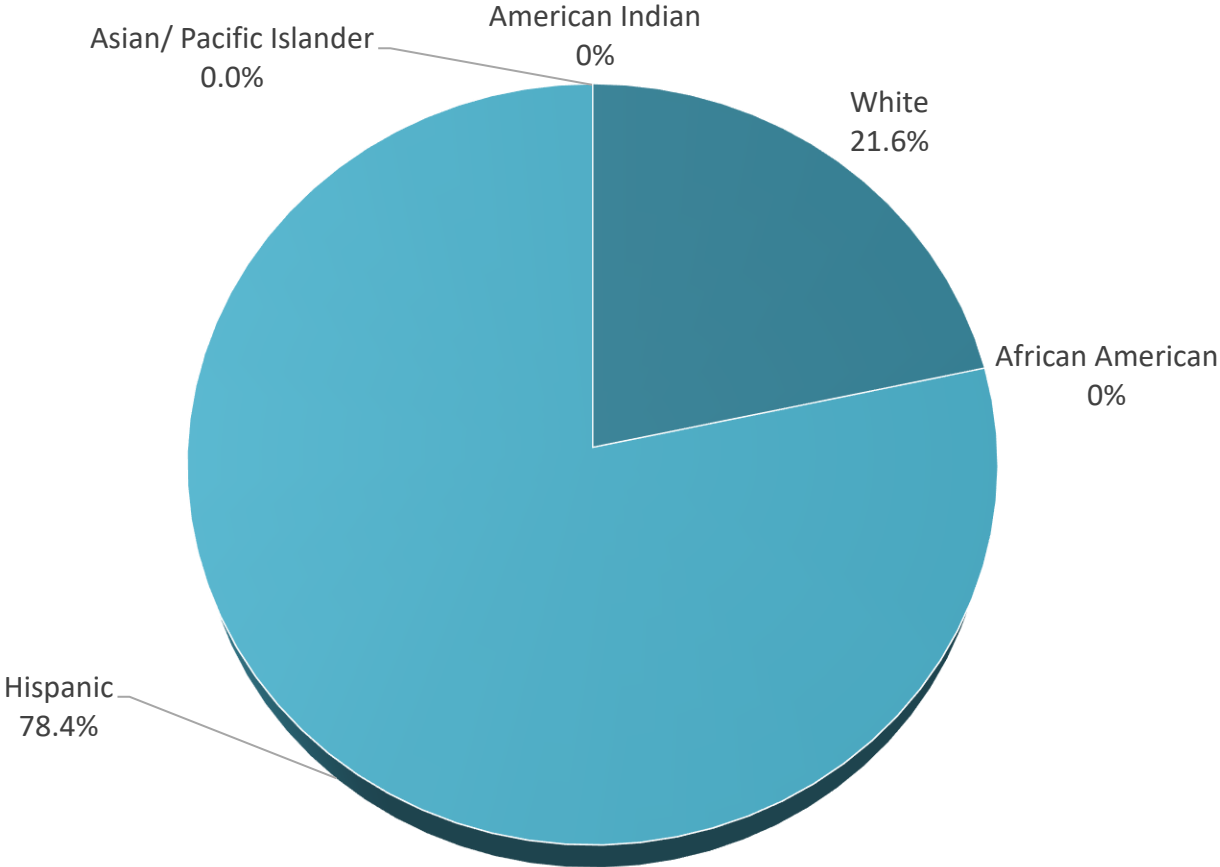
Workforce Analysis 2 – Department-wide Demographics by Race/ Ethnicity

In this department-wide analysis, minority employees account for 78.4% of the total employee base.

2023 Demographics by Race/ Ethnicity

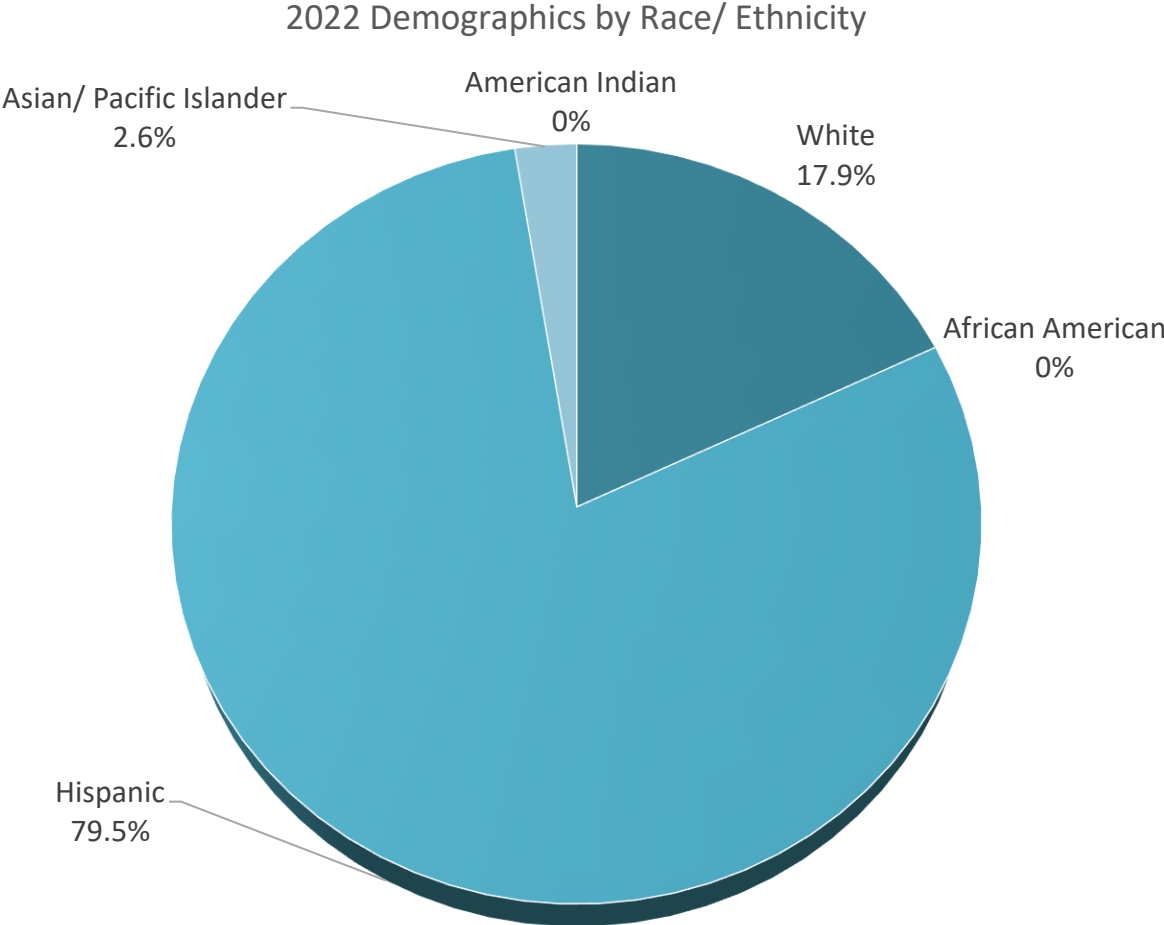
	White	African American	Hispanic	Asian/ Pacific Islander	American Indian	Total # of Employees	Total Minority Employees	Minority Percentage
Employees	8	0	29	0	0	37	29	78.4%
% of Total Employees	21.6%	0%	78.4%	0%	0%			

2023 Demographics by Race/ Ethnicity



2022 Demographics by Race/ Ethnicity

	White	African American	Hispanic	Asian/ Pacific Islander	American Indian	Total # of Employees	Total Minority Employees	Minority Percentage
Employees	7	0	31	1	0	39	32	82.1%
% of Total Employees	17.9%	0%	79.5%	2.6%	0%			

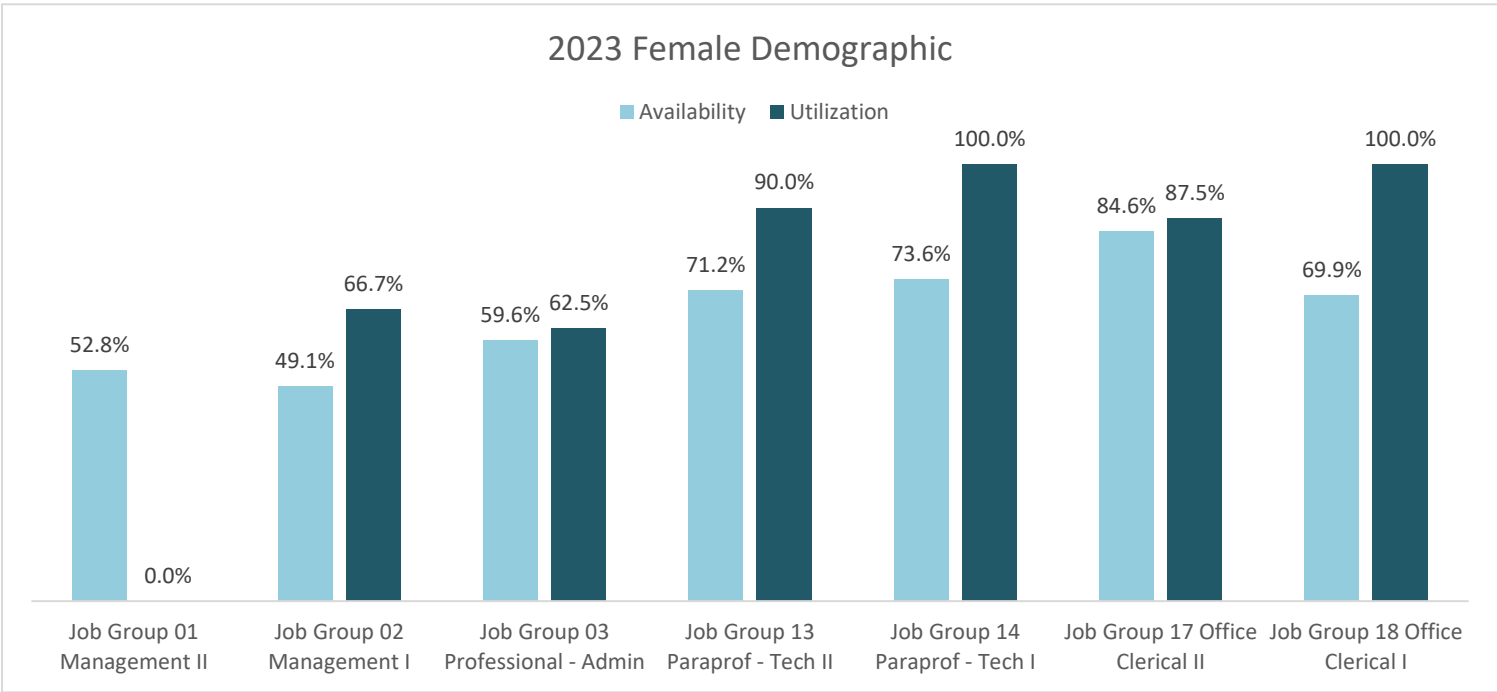


Workforce Analysis 3 – Female Demographic Comparison by Job Group

This analysis determines the percentage of female employees by job group. In nearly every category, from upper management to entry level, the percentages exceed the minimum thresholds.

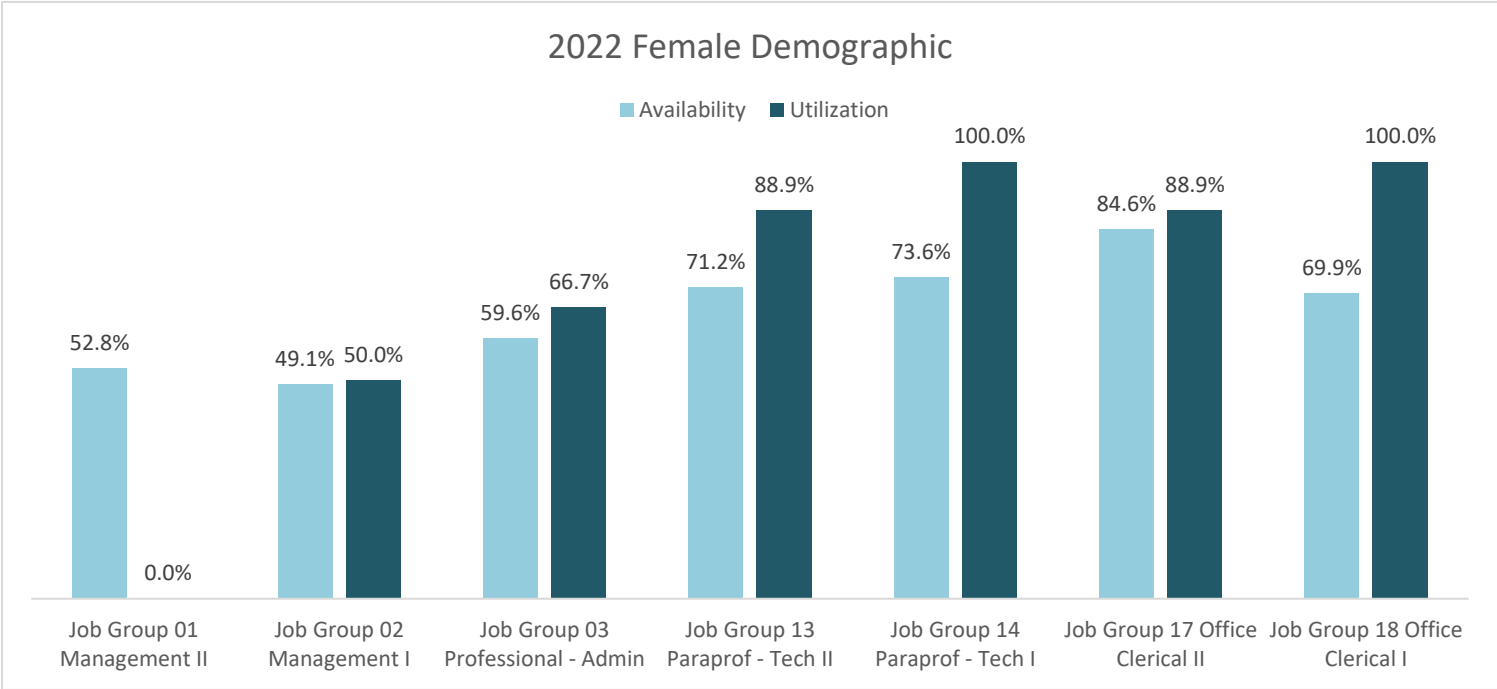
2023 Female Demographic Comparison by Job Group

	0 Female 1 Male	2 Female 1 Male	5 Female 3 Male	9 Female 1 Male	4 Female 0 Male	7 Female 1 Male	3 Female 0 Male
	1	3	8	10	4	8	3



2022 Female Demographic Comparison by Job Group

	0 Female 1 Male	1 Female 1 Male	6 Female 3 Male	8 Female 1 Male	3 Female 0 Male	8 Female 1 Male	6 Female 0 Male
	1	2	9	9	3	9	6



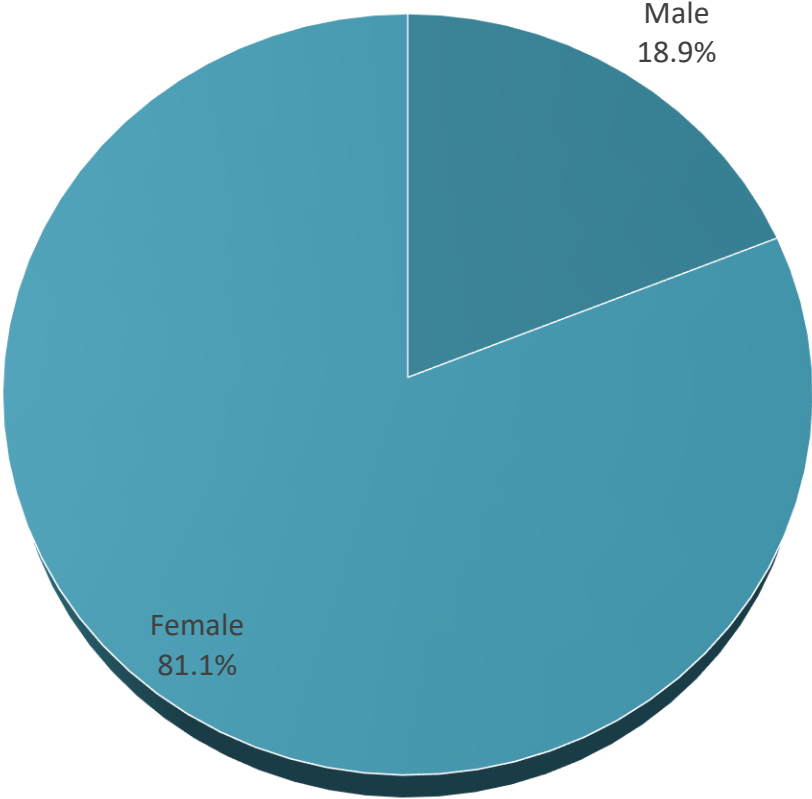
Workforce Analysis 4 – Department-wide Demographics by Gender

This analysis provides department-wide comparisons by gender.

2023 Demographics by Gender

	Male	Female	Total Department Employees
Employees	7	30	37
% of Total Employees	18.9%	81.1%	

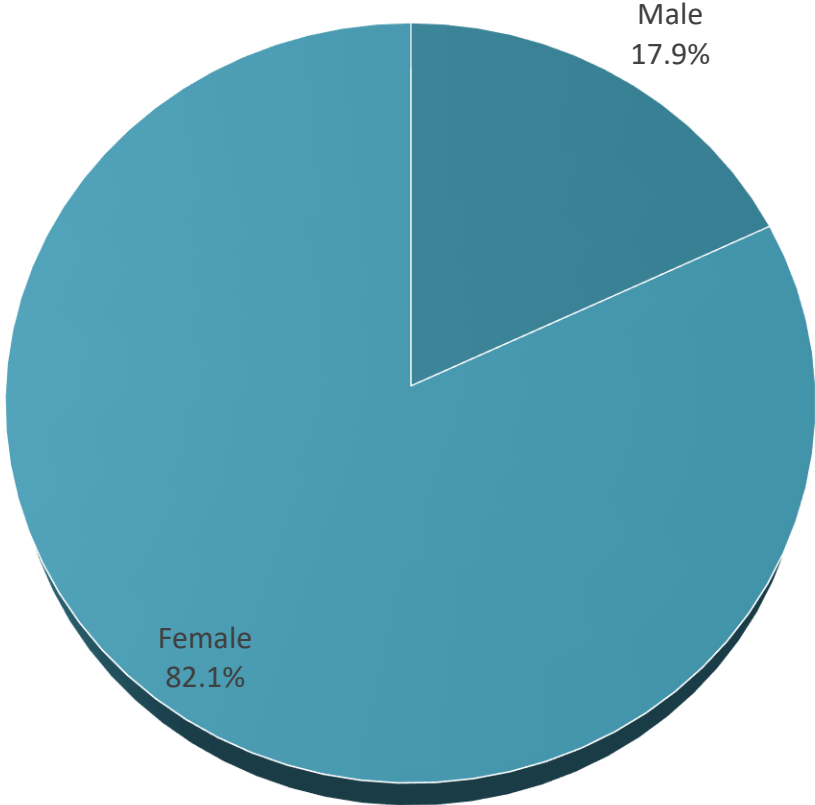
2023 Demographics by Gender



2022 Demographics by Gender

	Male	Female	Total Department Employees
Employees	7	32	39
% of Total Employees	17.9%	82.1%	

2022 Demographics by Gender



Section 4 Personnel Activity (2023)

Personnel Activity identifies the movement of staff into and out of each job group, dependent upon a variety of conditions – promotions, new hires, terminations, corrective actions, etc. Job groups 02, 03, 13, 14, 17, and 18 experienced activity within the past year. The data presented for 2023 Personnel Activity is captured between January 1 and December 31, 2023.

Personnel Activity Job Group 01 – Management I

Job Group: 01-Management I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements	
	Males	Females	Males	Females	Males	Females	Male	Females
White								
African American		NO ACTIVITY						
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic								
TOTAL (count each person only once)	0	0	0	0	0	0	0	0
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs	
	Males	Females	Males	Females	Males	Females	Male	Females
White								
African American		NO ACTIVITY						
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic								
TOTAL (count each person only once)	0	0	0	0	0	0	0	0

Personnel Activity Job Group 02 – Management I

Job Group: 02-Management I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White		1							
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	1	0	0	0	0	0	0	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 03 – Professionals - Administration

Job Group: 03-Professionals-Admin	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic						1		1	
TOTAL (count each person only once)	0	0	0	0	0	1	0	1	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 13 – Paraprofessional Technicians II

Job Group: 13-Paraprofessional Technicians II	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic				3				1	
TOTAL (count each person only once)	0	0	0	3	0	0	0	1	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 14 – Paraprofessional Technicians I

Job Group: 14-Paraprofessional Technicians I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic				2					
TOTAL (count each person only once)	0	0	0	2	0	0	0	0	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 17 – Office Clerical II

Job Group: 17-Office Clerical II	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic		1		2				1	
TOTAL (count each person only once)	0	1	0	2	0	0	0	1	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 18 – Office Clerical I

Job Group: 18-Office Clerical I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements	
	Males	Females	Males	Females	Males	Females	Male	Females
White								
African American								
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic		2						2
TOTAL (count each person only once)	0	2	0	0	0	0	0	2
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs	
	Males	Females	Males	Females	Males	Females	Male	Females
White								
African American								
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic				1				
TOTAL (count each person only once)	0	0	0	1	0	0	0	0

Personnel Activity (2022)

All job groups experienced activity in 2022. The data presented for 2022 Personnel Activity is captured between January 1 and December 31, 2022.

Personnel Activity Job Group 01 – Management I

Job Group: 01-Management I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements	
	Males	Females	Males	Females	Males	Females	Male	Females
White			1					1
African American								
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic								
TOTAL (count each person only once)	0	0	1	0	0	0	0	1
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs	
	Males	Females	Males	Females	Males	Females	Male	Females
White								
African American		NO ACTIVITY						
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic								
TOTAL (count each person only once)	0	0	0	0	0	0	0	0

Personnel Activity Job Group 02 – Management I

Job Group: 02-Management I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White								1	
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic	1			1					
TOTAL (count each person only once)	1	0	0	1	0	0	0	1	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American			NO ACTIVITY						
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 03 – Professionals - Administration

Job Group: 03-Professionals-Admin	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements	
	Males	Females	Males	Females	Males	Females	Male	Females
White		1						
African American								
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic				1				
TOTAL (count each person only once)	0	1	0	1	0	0	0	0
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs	
	Males	Females	Males	Females	Males	Females	Male	Females
White						1		
African American								
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic								
TOTAL (count each person only once)	0	0	0	0	0	1	0	0

Personnel Activity Job Group 13 – Paraprofessional Technicians II

Job Group: 13-Paraprofessional Technicians II	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic				1	1			2	
TOTAL (count each person only once)	0	0	0	1	1	0	0	2	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 14 – Paraprofessional Technicians I

Job Group: 14-Paraprofessional Technicians I	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic				3					
TOTAL (count each person only once)	0	0	0	3	0	0	0	0	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American	NO ACTIVITY								
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

Personnel Activity Job Group 17 – Office Clerical II

Job Group: 17-Office Clerical II	New Hires		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements	
	Males	Females	Males	Females	Males	Females	Male	Females
White		1						1
African American								
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic				2		1		
TOTAL (count each person only once)	0	1	0	2	0	1	0	1
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs	
	Males	Females	Males	Females	Males	Females	Male	Females
White								
African American		NO ACTIVITY						
Asian/Pacific Islander								
American Indian/ Alaskan Native								
Hispanic								
TOTAL (count each person only once)	0	0	0	0	0	0	0	0

Personnel Activity Job Group 18 – Office Clerical I

Job Group: 18-Office Clerical I	New Hires*		Promotions – Into Job Group		Promotions – Within Job Group		Voluntary Terminations & Retirements		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American									
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic		6						1	
TOTAL (count each person only once)	0	6	0	0	0	0	0	1	
	Involuntary Terminations (Non-Probationary)		Releases During Probationary Period		Corrective Actions		Layoffs		
	Males	Females	Males	Females	Males	Females	Male	Females	
White									
African American		NO ACTIVITY							
Asian/Pacific Islander									
American Indian/ Alaskan Native									
Hispanic									
TOTAL (count each person only once)	0	0	0	0	0	0	0	0	

*One of the New Hires for Job Group 18, transferred from another County department, taking a demotion from their previous position.

Section 5 Recruitment – Data (2023)

The following recruitment data reflects applicants’ gender, race, and ethnicity as they move through the recruitment process from application to screening, eligibility, interviewing, and ultimately the final hiring decision. Within the job group, the second set of data shows the diversity of screeners and interview panelists, as well as the processes employed and challenges encountered to secure the acceptable diversity of candidates. All data represented for 2023 Recruitment Data is captured between January 1 and December 31, 2023. The section entitled *Targeted Outreach Locations and Challenges*, located at the end of the recruitment section, addresses all job groups that experienced recruitments.

Recruitment Data Job Group 02 – Management I

Job Group: 02 Chief Deputy Treasurer-Tax Collector	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position**	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	2	3		3		2		1		
African American	1									
Asian/Pacific Islander		1		1						
American Indian/Alaskan Native										
Hispanic	2	3	1	3	1		1			
TOTAL (count each person once only)	5	7	1	7	1	2	1	1	0	0

*Applicants interviewed: Invited-3; Did not attend-1.

**Former incumbent rehired

Job Group: 02 Chief Deputy Treasurer-Tax Collector	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1	1		Email to Department California Revenue Officers Association CA Assoc. of County Treasurers and Tax Collectors CA Society of Municipal Finance Officers CA State Association of Counties
African American					
Asian/Pacific Islander					

American Indian/ Alaskan Native					California City and County News CA Municipal Treasurers Association Pink Jobs Black Career Women's Network Forty-five (45) minority-focused career sites, such as abilityJOBS, California Women Lead, and the Latin American Association
Hispanic			1		
TOTAL (count each person once only)	0	1	1	1	

Recruitment Data Job Group 03 – Professional Administration

Job Group: 03 Finance Manager I	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White		2		2		2				
African American										
Asian/Pacific Islander										
American Indian/ Alaskan Native										
Hispanic		5		4		4		3		1
TOTAL (count each person once only)	0	7	0	6	0	6	0	3	0	1

*Applicants interviewed: Invited-6; Declined to interview-2; Withdrew-1.

Job Group: 03 Finance Manager I	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1	1	1	Email to Department
African American					
Asian/Pacific Islander					
American Indian/ Alaskan Native					
Hispanic		1		1	
TOTAL (count each person once only)	0	2	1	2	

Recruitment Data Job Group 13 – Paraprofessional – Technicians II

Job Group: 13 Revenue Officer I	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	1		1							
African American										
Asian/Pacific Islander	1	4	1	4		2		1		
American Indian/Alaskan Native										
Hispanic	11	31	6	26	3	5	3	5		2
TOTAL (count each person once only)	13	35	8	30	3	7	3	6	0	2

*Applicants interviewed: Invited-10; Declined to interview-1; Did not respond-1.

Job Group: 13 Revenue Officer I	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White			1		Email to Department CRO Talent Acquisition Database
African American					
Asian/Pacific Islander					
American Indian/Alaskan Native					
Hispanic		2	1	1	
TOTAL (count each person once only)	0	2	2	1	

Recruitment Data Job Group 14 – Paraprofessional – Technicians I

Job Group: 14 Treasury Officer I	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	1	7	1	6	1	1				
African American	1		1		1		1			
Asian/Pacific Islander										
American Indian/Alaskan Native										
Hispanic	5	25	4	24	1	8	1	5		1
TOTAL (count each person once only)	7	32	6	30	3	9	2	5	0	1

*Applicants interviewed: Invited-8; Declined to interview-1.

Job Group: 14 Treasury Officer I	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White			1		Email to Department
African American					
Asian/Pacific Islander					
American Indian/Alaskan Native					
Hispanic		1		2	
TOTAL (count each person once only)	0	1	1	2	

Recruitment Data Job Group 14 – Paraprofessional – Technicians I

Job Group: 14 Accountant I*	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed**		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	2	1	2	1		1		1		
African American		1		1		1				
Asian/Pacific Islander	2	4	2	4	1					
American Indian/Alaskan Native										
Hispanic	5	21	5	19	1	8	1	6		1
TOTAL (count each person once only)	9	27	9	25	2	10	1	7	0	1

*Recruitment started in 2022; hire made in January 2023.

**Applicants interviewed: Invited-12; Declined to interview-4.

Job Group: 14 Accountant I	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White				2	Email to Department CRO Talent Acquisition Database
African American					
Asian/Pacific Islander		1			
American Indian/Alaskan Native					
Hispanic				1	
TOTAL (count each person once only)	0	1	0	3	

Recruitment Data Job Group 18 – Office Clerical I

Job Group: 18 Account Clerk	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White		12		12		8				
African American	1	1		1						
Asian/Pacific Islander	4	4	4	4	2	4				
American Indian/Alaskan Native										
Hispanic	18	63	13	55	6	30	1	9		2
TOTAL (count each person once only)	23	80	17	72	8	42	1	9	0	2

*Applicants interviewed: Invited-20; Declined to interview-5; Did not respond-4; Withdrew-1.

Job Group: 18 Account Clerk	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White				1	Email to Department
African American					
Asian/Pacific Islander					
American Indian/Alaskan Native					
Hispanic		2		2	
TOTAL (count each person once only)	0	2	0	3	

Recruitment – Data (2022)

All job groups experienced recruitments in 2022.

Recruitment Data Job Group 02 – Management I

Job Group: 02 Chief Deputy Treasurer- Tax Collector	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	1	3	1	3		2		2		
African American										
Asian/Pacific Islander										
American Indian/ Alaskan Native										
Hispanic	2	3	2	2	2	1	2	1		1
TOTAL (count each person once only)	3	6	3	5	2	3	2	3	0	0

Job Group: 02 Chief Deputy Treasurer-Tax Collector	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1	1	2	CRO Talent Acquisition Database County Website Email to Department Email Blast to the CA Association of County Treasurers and Tax Collectors and the CA Revenue Officers Association Forty-five (45) minority-focused career sites, such as abilityJOBS, California Women Lead, and the Latin American Association
African American					
Asian/Pacific Islander					
American Indian/ Alaskan Native					
Hispanic					
TOTAL (count each person once only)	0	1	1	2	

Recruitment Data Job Group 03 – Professional - Administration

Job Group: 03 Administrative Services Officer	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	2	4	2	3	2	3	1	3		1
African American		3		3		3		1		
Asian/Pacific Islander		1		1		1				
American Indian/ Alaskan Native	1		1		1					
Hispanic	5	6	5	5	3	5		1		
TOTAL (count each person once only)	8	14	8	12	6	12	1	5	0	1

* Applicants interviewed: Invited-8; Declined to interview-1; Did not respond-1.

Job Group: 03 Administrative Services Officer	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White			1	1	CRO Talent Acquisition Database County website Email to Department
African American		1			
Asian/Pacific Islander					
American Indian/ Alaskan Native					
Hispanic				1	
TOTAL (count each person once only)	0	1	1	2	

Recruitment Data Job Group 03 – Professional Administration

Job Group: 03 Accountant III	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	1	2	1	2						
African American										
Asian/Pacific Islander	1	1	1	1						
American Indian/Alaskan Native										
Hispanic	1	7		7		5		2		1
TOTAL (count each person once only)	3	10	2	10	0	5	0	2	0	1

* Applicants interviewed: Invited-5; Declined to interview-3.

Job Group: 03 Accountant III	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White			1	1	County website Email to Department
African American					
Asian/Pacific Islander					
American Indian/Alaskan Native					
Hispanic		2		1	
TOTAL (count each person once only)	0	2	1	2	

Recruitment Data Job Group 13 – Paraprofessional – Technician II

Job Group: 13 Accountant II*	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed**		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White										
African American										
Asian/Pacific Islander										
American Indian/Alaskan Native										
Hispanic								2		1
TOTAL (count each person once only)	0	0	0	0	0	0	0	2	0	1

*Recruitment ran by the Monterey County Health Department

** Applicants interviewed: Invited-3; Declined to interview-1.

Job Group: 13 Accountant II	Application Screeners (SMEs)***		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White				1	N/A – Recruitment conducted by the Monterey County Health Department
African American					
Asian/Pacific Islander					
American Indian/Alaskan Native					
Hispanic				2	
TOTAL (count each person once only)	0	0	0	3	

***N/A – System scored

Recruitment Data Job Group 14 – Paraprofessional – Technician I

Job Group: 14 Accountant I	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	4	2	2	2		2		2		
African American	1									
Asian/Pacific Islander	4	4	2	3	2	1				
American Indian/Alaskan Native										
Hispanic	8	34	6	26	6	17	3	6		1
TOTAL (count each person once only)	17	40	10	31	8	20	3	8	0	1

* Applicants interviewed: Invited-15; Declined to interview-3; Did not respond-1.

Job Group: 14 Accountant I	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1		1	CRO Talent Acquisition Database College Campuses via Handshake
African American					
Asian/Pacific Islander				1	
American Indian/Alaskan Native					
Hispanic		1		2	
TOTAL (count each person once only)	0	2	0	4	

Recruitment Data Job Group 14 – Paraprofessional – Technician I

Job Group: 14 Treasury Officer I	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White		2		1		1		1		
African American										
Asian/Pacific Islander										
American Indian/ Alaskan Native		1								
Hispanic	8	21	6	18	3	10	3	9		2
TOTAL (count each person once only)	8	24	6	19	3	11	3	10	0	2

* Applicants interviewed: Invited-14; Declined to interview-1.

Job Group: 14 Treasury Officer I	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1		1	CRO Talent Acquisition Database County website Email to Department
African American					
Asian/Pacific Islander					
American Indian/ Alaskan Native					
Hispanic				2	
TOTAL (count each person once only)	0	1	0	3	

Recruitment Data Job Group 17 – Office Clerical II

Job Group: 17 Accounting Technician	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	2	3	2	3		3		5		
African American										
Asian/Pacific Islander	1	2	1	2						
American Indian/Alaskan Native										
Hispanic	5	28	5	28	3	14	4	16		2
TOTAL (count each person once only)	8	33	8	33	3	17	4	21	0	2

* Applicants interviewed: Invited-26; Declined to interview-1.

Job Group: 17 Account Technician	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1		1	CRO Talent Acquisition Database
African American					
Asian/Pacific Islander					
American Indian/Alaskan Native					
Hispanic				2	
TOTAL (count each person once only)	0	1	0	3	

Recruitment Data Job Group 17 – Office Clerical II

Job Group: 17 Administrative Secretary	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White	1	11	1	10		7		4		1
African American		4		2		1				
Asian/Pacific Islander	1	3	1	2		1				
American Indian/ Alaskan Native	1									
Hispanic	4	31	4	23	1	4		3		
TOTAL (count each person once only)	7	49	6	37	1	13	0	7	0	1

Job Group: 17 Administrative Secretary	Application Screeners (SMEs)		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1	1	1	CRO Talent Acquisition Database County website Email to Department
African American					
Asian/Pacific Islander					
American Indian/ Alaskan Native					
Hispanic				1	
TOTAL (count each person once only)	0	1	1	2	

Recruitment Data Job Group 18 – Office Clerical I

Job Group: 18 Account Clerk	Applicants		Applicants Who Met Minimum Qualifications (Initial Screening)		Applicants Placed on Eligible List		Applicants Interviewed*		Applicant Hired for the Position	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
White										
African American										
Asian/Pacific Islander										
American Indian/ Alaskan Native										
Hispanic	5	48	5	48	2	41		24		3
TOTAL (count each person once only)	5	48	5	48	2	41	0	24	0	3

* Applicants interviewed: Invited-43; Declined to interview-2; Did not respond-16.

Job Group: 18 Account Clerk	Application Screeners (SMEs)**		Interview/Oral Board Panelists		Targeted outreach locations that received the job announcement and discuss any challenges
	Males	Females	Males	Females	
White		1		1	CRO Talent Acquisition Database
African American					
Asian/Pacific Islander					
American Indian/ Alaskan Native					
Hispanic			1	2	
TOTAL (count each person once only)	0	1	1	3	

**N/A – System scored

Section 6

Action-Oriented Programs

(Under the County's Equal Opportunity Plan
Chapter 5: Designation of Responsibility)

Recruitment

What collaborative relationships has your department established with community groups and stakeholders?

The office of the Treasurer-Tax Collector establishes and maintains ongoing positive associations with schools, four-year universities, and professional organizations throughout Monterey County and the tri-county area, as well as the San Francisco Bay Area and Santa Clara County. Additional institutions and associations explored include, but are not limited to, local community colleges and minority organizations.

In addition to the talent acquisition databases, collaborative relationships have been established with community groups, professional organizations, and other stakeholders, such as the following entities.

CRO Talent Acquisition Database list as saved in electronic recruitment folder

College campuses via Handshake:

- Biola University
- California Polytechnic State University, San Luis Obispo
- California State University, Monterey Bay
- California State University, San Bernadino
- Chapman University
- Claremont Graduate University
- Claremont McKenna College
- Harvey Mudd College
- Keck Graduate Institute
- Mills College
- Pepperdine University
- Pitzer College
- Point Loma Nazarene University
- Pomona College
- San Jose State University
- Santa Clara University
- Scripps College
- Stanford University
- University of California, Berkeley

University of California, Santa Cruz
 University of San Diego
 Whittier College

How have these relationships supported the department's recruitment efforts?

To reach the most diverse recruitment pool, the TTC advertises its recruitments with various schools and organizations locally, statewide, and nationally. Outreach depends on the level of the position and the potential for qualified candidates in the local labor pool. In addition to external outreach efforts, the TTC notifies all employees within the department of new postings and encourages them to apply. Interested applicants and employees are provided with instructions on the use of "Job Interest Cards" in the applicant tracking system. Employees are notified when a recruitment for a specific position is opened.

Continued recruitment, outreach, and internal development efforts of the Office of the Treasurer-Tax Collector resulted in hiring four (4) females, three (3) being Hispanic, internally promoting eight (8) Hispanic females, and seeing one (1) Hispanic female promoted to a higher-level position in another department.

How many selective certification waivers did your department request last year? How many were granted and why?

No certification waivers were requested and none were granted in 2023.

Hiring

What selection criteria does the department use in the fit interview?

Interviewers ask behavior-based and job-specific questions to determine an applicant's fit for a position. Such questions are devised by subject matter experts in that field who intrinsically understand the tasks and behavioral requirements necessary for the role.

How does your department ensure diversity on panels of screeners and interviewer panelists?

To ensure diversity among the screeners on the interviewing panels and, dependent on their availability, the department utilizes a mixture of managers, supervisors, leads, and peers that represent minorities and genders.

What training or information is given to screeners and interview panelists to help minimize bias in decision-making?

Screeners and panelists are briefed by the department's Senior Personnel Analyst on objectivity, rating, impression, and scoring with guidelines regarding rating and documenting scores. This briefing is a necessary step in the interviewers' decision-making process concerning an applicant or application. Screeners and panelists understand the importance of remaining objective or recusing themselves from rating or interviewing if they know the candidate or if they feel they cannot remain objective. Direction

is also given to not be swayed by negative or positive first impressions, but to instead focus on the applicant's ability to perform the job based on information provided in their responses to the supplemental and/or interview questions.

Promotions

What processes, procedures, or systems have been implemented in your department to support protected groups moving into senior job classifications beyond regular career progression (e.g., training, leadership development, mentoring, etc.)?

The Office of the Treasurer-Tax Collector continues to operate as a model department with an environment of inclusion where all employees are valued. In an effort to provide opportunities for cross-training and upward mobility to all interested employees, the TTC provides periodic training sessions and remote team building exercises for skill development. These trainings prove to be instrumental in helping staff grow and advance in their chosen careers. Generally, throughout the year, managers, supervisors, and staff attend trainings and workshops, including yearly conferences and workshops pertinent to the divisions of the Treasurer-Tax Collector's office. Following the relaxation of COVID restrictions in 2023, numerous trainings saw a resurgence in participation, especially where a virtual alternative was offered.

How effective have these initiatives been in supporting promotional opportunities for women and people of color?

The TTC supports each staff member in taking advantage of trainings inside and outside the agency, in which numerous employees attend workshops on subjects such as Career Development, Personality Styles, and Generational Engagement Workshops. Monterey County provides courses through Alliance Career Training Solutions, who offer computer and program training classes, like Microsoft Excel and Accounting Fundamentals. These opportunities aid staff in technical and professional development, gaining and/or keeping their skills current, and are helpful for advancement or promotion.

The percentages reflected in the *Retention and Inclusion* section reflect favorable numbers of women and individuals of color who are hired, promoted, and retained. The department's *Organizational Profile* also reflects a positive number of managers who are female and people of color, and, in some job groups, all positions are comprised of female employees who are people of color.

How does your department utilize performance evaluations to assess employees' commitment to building a diverse and inclusive workforce? How is this commitment considered when considering employees for promotional opportunities?

The Office of the Treasurer-Tax Collector utilizes performance evaluations as a tool to improve performance and behavior. During performance evaluations, the employee and manager discuss and document the employee's career goals and the potential training needed to support those goals.

It is the responsibility of both the supervisor and the manager to pinpoint areas where performance is deficient and work with the employee to enhance performance to a satisfactory level in a timely fashion.

Training and skill development are some of the methods used to improve performance and continuous feedback and communication is expected of the supervisor and the manager as well as the employee.

Retention and Inclusion

What data collection procedures/tools have you implemented to track the turnover rate for protected groups? What does the data show regarding turnover rates of protected groups compared to your department’s general population? Based on the data collected, what are the negative and positive trends you have found, and how will you act on them?

The Office of the Treasurer-Tax Collector tracks its own demographic trends and had done so since 2016. Trends for 2023 show as follows:

Group	General Population in Department		2023 Turnover		2023 New Hires		2023 Promotions	
	#	%	#	%	#	%	#	%
Female	31	81.6%	6	100%	4	100%	8	100%
Male	7	18.4%						
Group	General Population in Department		2023 Turnover		2023 New Hires		2023 Promotions	
	#	%	#	%	#	%	#	%
White	8	21.1%			1	25%		
African American								
Asian/Pacific Islander								
American Indian/Alaskan Native								
Hispanic	30	78.9%	6	100%	3	75%	8	100%

2023 data analysis yields the following conclusions:

Staff turnover: Six (6) turnovers; 100% Hispanic, 100% female

New hires: Four (4) new hires; 75% Hispanic, 100% female

Promotions: Eight (8) promotions; 100% Hispanic, 100% female

Turnover details: Two (2) retirements, one (1) promoted to other department

Reflecting on past and present data, the Office of the Treasurer-Tax Collector continues in its initiative to hire and promote females and minorities. The department ensures its work to utilize diverse hiring and screening panels, track turnover rates, and report on significant trends. Continued workshops, trainings, and seminars are offered to staff for professional and technical development. To better accommodate the needs of our changing workforce, and to foster employee loyalty, the department continues to collaborate with external stakeholders to implement programs and initiatives.

Not the least of these is the department’s efforts to offer training and development to enable employees to advance in their careers. Many employees have advanced through the ranks from entry-level positions

into senior roles as a result of the training, support, and opportunities made available to them over their tenure with the department.

What steps has the department taken to ensure lactation accommodations for all its employees? What is the department's practice when an employee requests an accommodation?

The Office of the Treasurer-Tax Collector offers each new employee information on the County's lactation policy and the *Monterey County Supports Breastfeeding* brochure. At this time, new employees are informed about the lactation room located on the first floor.

Likewise, upon being informed by an employee of their pregnancy, the department's Human Resources (HR) representative initiates the conversation regarding leave options and provides the employee with lactation information. Upon the employee's return to the workplace, HR staff discuss lactation needs including the lactation schedule and the location of the lactation room. A lactation schedule is worked out between HR, the employee, and their supervisor. If for some reason the room is unexpectedly unavailable, HR staff finds an alternative lockable location that can be provided.

Does the department conduct exit interviews? If so, what do you do with the answers to promote diversity and inclusion? If not, what alternative methods do you use to collect information regarding reasons for separation?

The TTC's Human Resources representatives provide each employee the opportunity for an exit interview. When the employee requests an exit interview, Human Resources will discuss those instances where the employee feels the department should do more to promote greater diversity and inclusion. Responses are discussed with the department manager and necessary actions and/or stops are taken to achieve the necessary changes.

Department managers are encouraged to establish open and consistent communication with their teams. This would include talking about career goals, making plans to achieve the stated career goals, and providing support for the employee to cross-train, attend trainings, and take classes to better prepare themselves for promotional opportunities.

What has been the greatest success/es regarding inclusiveness in your department?

The department's greatest successes rest in providing an environment in which all individuals may grow and enhance their knowledge, skills, and abilities. This example is seen many times where minorities and women, who began their employment in the department in entry/clerical positions, are now in executive, supervisory, and advanced positions – either in this department or in other departments throughout the county.

What opportunities for improvement have you found, and how will you address them?

The Office of the Treasurer-Tax Collector continues to build on the survey information provided to develop our own employees for promotion, help them reach their career goals, and encourage input on

new ideas for processes, training, and overall improvements. The TTC continues to recognize and celebrate staff successes and their years of dedication to the County. This type of recognition contributes to better morale, increased productivity, and overall job satisfaction within the department.

In the upcoming year, the TTC will provide the necessary training and cross-training for growth, success, and advancement. In addition, leadership will continue to ensure that equal opportunity is applied for all applicants in the areas of recruitment, hiring, promotions, performance evaluations, and career development, and that no instances of unlawful discrimination occur at any point in the process.

Section 7

Accomplishments and Resource Needs

Please highlight your department's successes in achieving a diverse workforce in this section. Describe your department's assessment of resource needs from the Civil Rights Office. Please share any suggestions and recommendations for improvement you can offer regarding current policies and procedures. Feel free to use examples or specify by job group.

The following chart identifies represented and under-represented minority and gender categories by the Office of the Treasurer-Tax Collector. All results reflect data captured between January 1 and December 31, 2023.

Job Group	Minorities			Females		
	Current Dept. Utilization	Goal	Results	Current Dept. Utilization	Goal	Results
Job group 01 (Management II)	0%	34.6%	Not Met	0%	52.8%	Not Met
Job Group 02 (Management I)	66.7%	37.6%	Met	66.7%	49.1%	Met
Job Group 03 (Professionals-Administration)	50%	52.8%	Not Met	62.5%	59.6%	Met
Job group 13 (Paraprofessional-Technicians II)	90.9%	65.2%	Met	90.9%	71.2%	Met
Jon group 14 (Paraprofessional-Technicians I)	100%	54.9%	Met	100%	73.6%	Met
Job Group 17 (Office Clerical II)	87.5%	79.9%	Met	87.5%	84.6%	Met
Job Group 18 (Office Clerical I)	100%	64.9%	Met	100%	69.9%	Met

The TTC's workforce culture and policies are designed to be inclusive and supportive of all employees. Practices are regularly assessed with input from staff members from diverse backgrounds, and initiatives have been implemented to address any concerns identified. The department has diligently worked to implement a range of strategies and initiatives to achieve a diverse and inclusive workforce that reflects the demographics of the community. The TTC remains committed to continuous improvement and welcomes the ongoing support and guidance of the Civil Rights Office.

Please include your department's current compliance rates with the required training from the Civil Rights Office. All employees must complete the Harassment and Discrimination Prevention Training and the Civil Rights Training every two years.

The following chart reflects the TTC's Civil Rights and Harassment and Discrimination Prevention training compliance rates for 2023.

Harassment & Discrimination Prevention Training	Total Number of Employees	# of Employees who Completed Training	Percentage of Employees Completed Training
Supervisors/Managers	12	12	100%
Employees (non-supervisor/non-manager)	26	26	100%
Totals	38	38	100%

Civil Rights Training	Total Number of Employees	# of Employees who Completed Training	Percentage of Employees Completed Training
Supervisors/Managers	12	12	100%
Employees (non-supervisor/non-manager)	26	26	100%
Totals	38	38	100%

Section 8

Follow-Up Requested by the Commission

Please discuss any follow-up requested by the Commission during past years' presentations on the Departmental Equal Opportunity Plan in this section. Follow-up may occur via action, memorandum, or additional presentation to the Commission.

The Commission did not request any follow-up to the TTC's 2023 Equal Opportunity Plan.

Section 9

Title VI of the Civil Rights Act Implementation*

	Requirement	Implementation Notes	Completed
General	Title VI notice at public counters	Located on bulletin board in lobby	Y
	Internal process to forward discrimination complaints to Civil Rights Office	Incorporated in department procedures	Y
	Nonstandard contracts include a nondiscrimination clause	Ongoing reference in contracts questionnaire	Y
	Data is collected on the ethnicity and language of the people served	Data used is provided by the County	Y
Language Access	Departmental language assessment completed	43% English/ Spanish 57% English	Y
	Vital documents translated into Spanish	Customer Service Survey, correspondence, and working on Update of Tax Bills	Y
	Website – minimize PDFs. When using PDFs, include a Spanish version	Project is ongoing and efforts continue to translate as many key documents as possible	Y
	Procedures and budget for the use of interpretation and translation services	Procedure written to utilize Language Line services via master agreement with the County	Y
	Communication services for people who are deaf or hard of hearing	ASL services provided as part of county-wide contract	Y
	Public voicemails in English and Spanish	On the main line and department, after hours or closure messaging	Y
	Public counters: language charts available	Posted on bulletin board	Y
	Public counters: all signage in English and Spanish	Provided on signage and Jumbotron	Y
	Public counters: procedures to have bilingual staff available	Department policy requirement for staff	Y
Community Engagement	Projects, programs, policies, and services reflect County stakeholders and are sensitive to diverse demographic backgrounds	Bilingual Staff Engaged Language Line	Y
	Analyzed potential disproportionate adverse human health or environmental effects on communities of color, tribal communities, or others underrepresented in the public process	N/A	N/A
	Considerations taken to ensure equitable engagement	Bilingual Staff Engaged Language Line	Y
	Key community engagement contacts established	N/A	N/A

* The County's [Title VI of the Civil Rights Act Implementation Plan](#) includes a general overview of how the County of Monterey will comply with requirements pertaining to Title VI of the Civil Right Act of 1964. Learn about the County's Title VI Plan by following the link.