Board of Directors Meeting Agenda - REVISED

I. Call to Order

a. Moment of Silence / Pledge of Allegiance (Please Stand)

b. Reading of the Promise of Community Action (Please Stand)

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

c. Board Seat Appointment – Jeremy Tobias, Chief Executive Officer – Action Item
   i. Accepting the appointment of Lily Pimentel-Stratton as the City of Bakersfield Mayor’s Office Representative (p. 4-7)

d. Roll Call

   Fred Plane (Chair)  Jimmie Childress  Gina Martinez
   Maritza Jimenez (Vice Chair)  Mia Cifuentes  Jonathan Mullings
   Ana Vigil (Secretary)  Jeff Flores  Yolanda Ochoa
   Michelle Jara-Rangel (Treasurer)  Curtis Floyd  Guadalupe Perez
   Denise Boshers  Nila Hogan  Lily Pimentel-Stratton

II. Introduction of Guests / Public Forum

The public may address the Board of Directors on items not on the agenda but under the jurisdiction of the Board. Speakers are limited to 3 minutes. If more than one person wishes to address the same topic, the total group time for the topic will be 10 minutes. Please state your name before making your presentation.

III. Special Presentation

a. Brown Act Training by Attorney Alex Dominguez of Klein DeNatale Goldner

b. Results Oriented Management & Accountability (ROMA) Certified Implementors by Pritika Ram, Chief Business Development Officer (p. 8)

IV. Consent Agenda

The Consent Agenda consists of items that are considered routine and non-controversial. These items are approved in one motion unless a member of the Board or the Public requests removal of a particular item. If comment or discussion is requested, the item will be removed from the Consent Agenda and will be considered in the order listed – Action Item

a. Minutes from May 31, 2023, Board of Directors Meeting (p. 9-13)
b. Minutes from the June 7, 2023 Personnel Committee Meeting (p. 14-15)
c. Head Start Division Reclassification of Job Descriptions \((p. \text{16-54})\)
d. Minutes from the June 14, 2023 Program Review & Evaluation Committee Meeting \((p. \text{55-59})\)
e. CES Program Presentation \((p. \text{60-71})\)
f. May 2023 Program Reports \((p. \text{72-109})\)
g. May 2023 Application Status Report & Funding Profiles \((p. \text{110-115})\)
h. May 2023 Head Start / State Child Development Enrollment Update & Meals Report \((p. \text{116-117})\)
i. 2021-2025 Strategic Plan Update for Goal 2, Goal 3, and Goal 5 \((p. \text{118-130})\)
j. Minutes from the June 21, 2023, Budget & Finance Committee Meeting \((p. \text{131-133})\)
k. Head Start / Early Head Start Budget to Actual Reports for April, 2023 \((p. \text{134-141})\)
l. Resolution to Approve the Submission of the 2022 Department of Energy Bipartisan Infrastructure Law Weatherization Assistance Program (DOE BIL WAP) Contract #22P-7010 \((p. \text{142-144})\)
m. Strategic Plan Goal 6 Update \((p. \text{145-153})\)
n. April 2023 Financial Statements \((p. \text{154-211})\)

V. New Business

a. Workers Compensation Insurance Renewal – \textit{Info Item (p. 212-227)} Emilio Wagner, Director of Operations

b. Friendship House Fencing Contract Award - \textit{Action Item (p. 228-234)} Emilio Wagner, Director of Operations

c. 18th Street Design Build Contract Award - \textit{Action Item (p. 235-334)} Emilio Wagner, Director of Operations

d. Calendar Year 2024 – 2025 Community Action Plan and Community Needs Assessment – \textit{Action Item (p. 335-464)} Vanessa Mendoza, Grant Administrator

e. Head Start / Early Head Start Carry Over Request – \textit{Action Item (p. 465-466)} Jerry Meade, Assistant Director - Program

f. Head Start & Early Head Start School Readiness Goals 2023-2024 – \textit{Action Item (p. 467-490)} Rashi Strother, Education Manager

g. Selection of Insurance Broker – \textit{Action Item (p. 491)} Lisa McGranahan, Director of Human Resources

h. HHAP Contract #2023-302 - \textit{Action Item (p. 492-513)} Freddy Hernandez, Director of Youth & Community Services

i. San Joaquin County Office of Education (SJCOE) Annual Contract Renewal – \textit{Action Item (p. 514-539)} Jerry Meade, Assistant Director - Program

VI. Foundation Board Report

a. CAPK Foundation Report – \textit{Action Item (p. 540-548)} Catherine Anspach, Director of Development

1. Minutes from the March 28, 2023 meeting.
2. CAPK Foundation Financial Reports for April 2023

VII. Advisory Board Reports

a. Head Start Policy Council Report – \textit{Action Item (p. 549-556)} Nila Hogan, PC Representative
2. May 23, 2023 Policy Council Minutes

VIII. **Chief Executive Officer Report**

   a. CEO Report for June 2023 – *Info Item (Verbal Report)*

      1. General Update

IX. **Board Member Comments**

X. **Next Scheduled Meeting**

   Board of Directors Meeting
   12:00 pm
   August 30, 2023
   5005 Business Park North
   Bakersfield, CA 93309

XI. **Adjournment**

   *This is to certify that this Agenda Notice was posted in the lobby of the CAPK Administrative Office at 5005 Business Park North, Bakersfield, CA and online at www.capk.org by 12:00 pm, June 23, 2023. Paula Daoutis, Administrative Coordinator.*
L. PIMENTEL-STRATTON

EDUCATION

Walden University
Doctor of Education 2014
Doctoral Research Project: Child-Care Workers’ Perceptions: Issues of Retention and Turnover in their Profession
Honors: Dissertation passed “with Distinction”

California State University, Los Angeles
M.A., Early Childhood Development 1993
Duplication of BA in Child Development coursework prior to entering M.A. program

California Polytechnical University, Pomona
B.A., Communication Arts 1979
Area of Concentration: Journalism track

PROFESSIONAL EXPERIENCE

Bakersfield College
Professor- Child Development [on campus and on-line] 2005-Present
Develop syllabus, Develop Course Outline of Record/Curriculum, Develop Andragogical tools for classroom instruction, provide instruction in English and Spanish languages, administer and evaluate assignments, determine grades, provide guidance/counseling, serve department through participation in manifold committees, serve college and students through participation in campus and student clubs, and all of the sundry other duties of a tenured professor.

University of California, Los Angeles Extension
Adjunct Faculty [on-campus and on-line] 2002-Present
Develop Syllabus, Develop Andragogical tools for classroom instruction, provide instruction in English and in Spanish languages, Administer and evaluate assignments, determine grades, Provide guidance/counseling to students, and all of the sundry other duties of an adjunct faculty.

University of California, Los Angeles Extension: Kern County Cohort 2013-2017
Worked with community to develop a Early Childhood Basic Certificate Spanish Language Cohort for Kern County. In addition to
all of the duties above, developed community connections in our region to gain buy-in from community partners.

**Pacific Oaks College**
*Adjunct Faculty [on-campus]*
2004-2007
Develop Syllabus, Develop Andragogical tools for classroom instruction, provide instruction, Administer and evaluate assignments, determine grades, Provide guidance/counseling to students, and all of the sundry other duties of an adjunct faculty.

**Bakersfield College**
*Adjunct Faculty [on-campus and on-line]*
2002-2005
Develop Syllabus, Develop Andragogical tools for classroom instruction, provide instruction in English and in Spanish languages, Administer and evaluate assignments, determine grades, Provide guidance/counseling to students, and all of the sundry other duties of an adjunct faculty.

**East Los Angeles City College**
*Adjunct Faculty [on-campus]*
1997-1999
Develop Syllabus, Develop Andragogical tools for classroom instruction, provide instruction in English and Spanish Languages, Administer and evaluate assignments, determine grades, Provide guidance/counseling to students, and all of the sundry other duties of an adjunct faculty.

**RELATED EXPERIENCE**

**Early Childhood Council of Kern**
Council Member
2022-Present

**Infant & Toddler Seminar**, planning, organizing & execution.
4/22/2023

**California Early Childhood Mentor Program**
*Regional Coordinator*
2016-Present
Bakersfield College and Taft College, Recruitment of new Mentor Teachers, maintain regional database, conduct yearly mentor teacher meetings Selection committee lead, provide quarterly and annual reporting of CECMP activities in Kern, community network and outreach
Head Start and Early Head Start City of Oakland

**Educational Consultant**  
2008-2010

Technical support for teachers in infant/toddler and preschool classrooms. ECE Curriculum training and support for teachers and staff.

WestED Program for Infant Toddler Caregivers

**Bilingual Regional Coordinator/Trainer**  
2001-2005

Development of regional network of PITC Certified Trainer. Community outreach, provide child development workshops and trainings for partners in ECE programs throughout the Central Valley.

Head Start and Early Head Start City of North Hollywood

**Educational Consultant**  
1998-1999

Designed and coordinated instructional ECE curriculum for teachers in infant/toddler and preschool classrooms. ECE Curriculum training and support for teachers and staff.

Volunteers of America, North Hollywood

**Education and Curriculum Consultant**  
1997-1999

Technical support and training for teachers in infant/toddler and preschool classrooms. ECE Curriculum training and support for teachers and staff. Organize and conduct Parenting/playgroup instruction for children and families.

Department of Child and Family Services, Los Angeles

**Child Development Specialist**  
1993-1995

Child and family advocate, community outreach, training and technical support for ECE teachers and staff. Intervention support for at-risk children and families.

**PUBLICATIONS AND PAPERS**

Child-Care Workers’ Perceptions: Issues of Retention and Turnover in their Profession  
UMI Dissertation Publishing. UMI # 3610878  
2014
LANGUAGES

- Spanish— native language
- English— Second language- speak, read and write with native language proficiency.

MEMBERSHIPS

- Early Childhood Council of Kern County
- Kern County child Development Conference Steering Committee
- California Early Childhood Mentor Program
- PEACH Early Childhood Higher Education Collaborative.

CURRICULUM TAUGHT

- Available upon request.
Results Oriented Management & Accountability (ROMA)

ROMA provides a framework for continuous growth and improvement among local CAAs and a basis for state leadership and assistance.

**Results Oriented Management Principles**
- Assess poverty needs and conditions within the community.
- Define a clear anti-poverty mission for the CSBG Network and the strategies and services to address those needs, both immediate and longer term, in the context of existing resources and opportunities in the community.
- Identify specific improvements, or results, to be achieved among people with low-incomes and communities in which they live.
- Organize and implement programs, services, and strategies within the agency and among partnering organizations, to achieve anticipated results.
Board of Directors Meeting Minutes

I. Call to Order

Chairman Fred Plane called the meeting to order at 12:02 pm at the Community Action Partnership of Kern Administrative Building, located at 5005 Business Park North, Bakersfield, CA.

a. Moment of Silence / Pledge of Allegiance

b. Reading of the Promise of Community Action

c. Roll Call was taken with a quorum present:

   Present: Fred Plane (Chair), Maritza Jimenez (Vice Chair, left at 12:47 pm), Ana Vigil, (Secretary), Michelle Jara-Rangel (Treasurer), Denise Boshers, Jimmie Childress, Mia Cifuentes, Jeff Flores (arrived at 12:05 pm, left at 1:07 pm), Curtis Floyd, Gina Martinez, Yolanda Ochoa (arrived at 12:13 pm), Guadalupe Perez (left at 1:01 pm).

   Absent: Nila Hogan, Jonathan Mullings

   Others present: Jeremy Tobias, Chief Executive Officer; Gabrielle Alexander, Director of Finance; Catherine Anspach, Director of Development; Louis Gill, Chief Program Officer; Yolanda Gonzales, Director of Head Start / State Child Development; Freddy Hernandez, Director of Youth & Community Services; Susana Magana, Director of Health & Nutrition; Lisa McGranahan, Director of Human Resources; Rebecca Moreno, Director of Community Development; Emilio Wagner, Director of Operations; Tracy Webster, Chief Financial Officer; other CAPK staff.

II. Introduction of Guests / Public Forum

No one addressed the Board.

III. Special Presentation

a. Re-Think Your Drink Campaign – Alan Rodriguez, CalFresh Health Living Program Administrator

• Alan Rodriguez provided a summary of the CalFresh program, highlighting the Re-Think Your Drink Campaign for the month of May. Staff from CalFresh provided two healthy drink options for the Board with fruit/vegetable infused water. The presentation focused on the need for individuals and families to transition away from sugary drinks and select healthy options to avoid obesity and other health conditions.

IV. Consent Agenda

Board Chair Fred Plane asked members of the Board, and the public, if they would like to remove any items from the Consent Agenda for further discussion. Michelle Jara-Rangel asked for Items IV(c) & IV(e) to be removed.
Motion was made and seconded to approve all items on the Consent Agenda, except items IV(c) & IV(e). Carried by unanimous vote (Jimenez/Perez).

Item IV(c) Head Start Personnel Update – Michelle Jara-Rangel asked how many vacant positions are at state mandated sites. Jerry Meade said about 80% and that there are only 8 facilities that are non-state mandated. Michelle also asked if any part-year staff are willing to work full-days for a summer bridge program. Jerry said there is not a summer bridge program this year.

Motion was made and seconded to approve item IV(c) from the Consent Agenda. Carried by unanimous vote (Perez/Ochoa).

Item IV(e) Head Start Division Reclassification of Job Descriptions - Michelle Jara-Rangel said she did not see the Education Manager listed on the attached org chart that was previously on the org chart that was presented in March. Yolanda Gonzales said there are two Education Manager job descriptions for Early Head Start (EHS) and Head Start (HS); however, the EHS position has not been presented yet and is not on the org chart. Michelle then asked why one position is reporting to the Director and the other to the Assistant Director. Jerry Meade said that the EHS position is located in San Joaquin County, so it made sense to have that position report to the Assistant Director in San Joaquin.

Michelle also asked about the Support Services Manager position and noted that there was a person over support services in the past, and now there appears to be a large workload under the Assistant Director. Jerry Meade replied that the workload is divided based on the number of reports. The Service Manager positions are in Kern County and fall under the Assistant Director in Kern County. The Support Services Manager position will now oversee the supervisors in that subset. The Assistant Director position will provide guidance, support, and evaluate work performance and make sure all regulations are in compliance.

Michelle asked why the center-based administrators have an Admin Assistant and a Program Assistant and other positions don’t have the same level of support staff. Jerry Meade said the staffing is largely dependent upon the workload and the number of supplies to be ordered and managed, which is why there is additional administrative support.

Michelle also asked if we are on track to open classrooms under construction. Jerry Meade said that we have received the license for the Pete Parra center and the Harvey Hall center is nearly complete. Classrooms will be ready pending licensing and available staff to open the classrooms but noted that staff shortages will inhibit the opening of centers in the fall. Michelle asked if the home base program is still in place. Jerry said that educators are being onboarded and there is a new curriculum for ages 0-5 with 26 available slots.

Motion was made and seconded to approve item IV(e) from the Consent Agenda. Carried by unanimous vote (Jara-Rangel/Ochoa).

V. New Business

a. Updated COVID Policies and Recommendations – Lisa McGranahan, Director of Human Resources - Action Item

Lisa McGranahan provided a summary of the presentation provided at the last meeting, and staff was directed to go back to the Head Start Centers and Policy Council. The Board previously asked staff to
get a collective opinion and staff met with Policy Council members on May 23 where there was a lot of parent engagement, and all were in support of staff’s recommendation.

Michelle Jara-Rangel asked if this information was presented at the center level. Jerry Meade confirmed that it had.

Fred Plane asked if the Union Reps have been advised and Lisa McGranahan said that it was not necessary to advise the Union.

Jeff Flores asked about the new protocol for suspected and confirmed cases. Lisa said if there is exposure but no symptoms, the employees can come to work. If the employee has had an exposure and is symptomatic, HR staff will provide test kits to the employee for at-home testing.

b. M Street Navigation Center Update and 3-Year Anniversary Highlights – Rebecca Moreno, Director of Housing & Supportive Services – **Info Item**

Rebecca Moreno reported that the M Street Navigation Center celebrated the 3-year anniversary of operations in May and thanked the Board Members who have come out to the center for a tour or volunteer opportunities. Rebecca provided statistics on the number of individuals served, number of meals, the number of clients who have gone on to permanent housing placements, and the numerous programs offered by CAPK and partners.

Rebecca also reported that next month is the 1-year anniversary of the safe camping / safe parking program and Rebecca provided some stats, which included 9 housing placements directly from safe camping. Another 19 individuals have moved to the center and are taking advantage of the services provided and concentrating on achieving permanent housing.

Fred Plane acknowledged the partnership with the County of Kern for the services they provide that contribute to the success of the program. Rebecca confirmed that the partnership with the County is extremely valuable.

Jimmie Childress asked if staff from M Street will be responsible for operations at the Supportive Services Village, if CAPK is awarded the contract to operate the facility. Rebecca said a new team would be assembled for the Supportive Services Village and staff from M Street will provide the training. Rebecca also confirmed that if existing staff are interested in applying for positions at the Supportive Services Village, they are welcome to apply.

Jeff Flores asked about the number of clients housed vs. served. Rebecca said the served population is the number of people coming through the doors. Coming and leaving, sometimes it takes multiple times to be ready to fully partake in the programs and services offered. Out of 1,966 clients served, over 232 were placed in permanent housing.

Ana Vigil asked about the number of Veterans served at M Street. Rebecca said she would need to get that information as she did not have that information readily available.

Mia Cifuentes asked if staff tracks the permanent housing placements after they leave M Street, and the Higher Up graduates, and said it would be nice to know if the housing placements are still in permanent housing, and if the Higher UP graduates are still employed. Rebecca said that the former clients are tracked for a short time, but not on a long-term basis.
VI. **Advisory Board Reports**

   a. **Head Start Policy Council Report** – Nila Hogan, Policy Council Representative – *Action Item*

   Lisa Gonzales, Governance Coordinator presented the above action item on behalf of Nila Hogan and reported that the Policy Council items presented at the April 25, 2023 meeting were approved.

   Motion was made and seconded to approve the May 2023 Policy Council report and all items. Carried by unanimous vote (Ochoa/Jara-Rangel).

VII. **Chief Executive Officer Report**

   a. **CEO Report for May 2023** – Jeremy Tobias, Chief Executive Officer – *Info Item*

   1. **Report on CSD Director Visit to CAPK on May 25, 2023.**

   Jeremy Tobias reported that staff hosted the California Department of Community Services & Development (CSD) with the Director, David Scribner and Leslie Taylor, Deputy Director. It was a one-day tour that was concentrated on the CSD funded programs. CAPK staff arranged for tours of M Street Navigation Center, VITA, Energy, Friendship House, and the Food Bank. The Executive Leadership Team also hosted a lunch with a presentation of all programs. Board Chair Fred Plane and Vice Chair Maritza Jimenez were also in attendance for the lunch and presentation. Jeremy reported that CAPK and staff received a great review from the CSD Directors, and they consider CAPK one of the highest performing CAP agencies in the state and said that staff provided them with good ideas for them to share with others in the network.

   Fred Plane added that Director David Scribner said that CAPK is the “Crown Jewel” in California.

VIII. **Board Member Comments**

   • No Comments.

IX. **Closed Session**

Prior to entering into Closed Session, Board Member Jeff Flores left the meeting.

Motion was made and seconded to enter into Closed Session at 1:08 pm. Carried by unanimous vote (Childress/Jara-Rangel).

   a. **Conference with Real Property Negotiators pursuant to Section 54956.8:**

   Property Address: 1300 18th Street, Bakersfield, CA 93301

   Agency Negotiators: Jeremy Tobias, Tracy Webster, and Emilio Wagner

   Negotiating Parties: County of Kern

   Under Negotiation: Concerning price and terms

Motion was made and seconded to enter into Open Session at 1:33 pm. Carried by unanimous vote (Jara-Rangel/Vigil).
X. **Closed Session Report**

Jeremy Tobias reported that the Board approved the Purchase and Sale Agreement between CAPK and the County of Kern, for a 50 percent interest of the building located at 1300 18th Street, Bakersfield, CA 93301, and authorized the CEO to sign the agreement. The agreement is available for public review.

XI. **Next Scheduled Meeting**

Board of Directors Meeting
12:00 pm
Wednesday, June 28, 2023
5005 Business Park North
Bakersfield, CA 93309

XII. **Adjournment**

The meeting was adjourned at 1:35 pm.
Personnel Committee Minutes

1. Call to Order

Committee member Nila Hogan called the meeting to order at 12:02 pm at the Community Action Partnership of Kern administrative building, located at 5005 Business Park North, Bakersfield, CA.

2. Roll Call

Roll Call was taken with a quorum present.

Present: Jonathan Mullings, Guadalupe Perez, and Nila Hogan

Absent: Maritza Jimenez (Chair)

Others present: Lisa McGranahan, Director of Human Resources; Yolanda Gonzales, Director of Head Start; Freddy Hernandez, Director of Youth and Community Services; other CAPK staff.

3. Public Comments

No one addressed the Committee.

4. New Business


Jerry Meade presented the above informational item and ended with a presentation on the San Joaquin job fair.

Currently, there are 589 Head Start employees with 112 vacancies. For May, 12 employees were onboard, but there were 11 resignations. Jerry added that we have conducted seven (7) series of interviews in May for multiple positions.

Jerry presented a summary on the San Joaquin County job fair that CAPK participated in conjunction with the San Joaquin County Office of Education. The event took place on Saturday, June 3, 2023. Representatives for credentialing, background checks, and public health were present to perform on-site tests. CAPK hosted on-site interviews and Human Resources was in attendance for support. Over 41 applications were submitted, and 17 interviews were conducted. CAPK extended numerous offers to applicants that brought in the required documentation, and once we receive missing documentation from other applicants, additional offers will be extended. The estimated number of participants was in the hundreds.
Pastor Mullings extended a congratulations to the staff for a job well done.

Nila Hogan asked if the open positions were all teaching positions. Jerry responded that 102 are direct services staff, so the majority are teaching staff.

b. **Head Start Division Reclassification of Job Descriptions – Jerry Meade, Assistant Director of Head Start, Program – Action Item**

Jerry Meade presented the above action item for approval.

Motion was made and seconded to approve staff’s recommendation. Carried by unanimous vote (Mullings/Perez).

5. **Committee Member Comments**

6. **Next Scheduled Meeting**

Personnel Committee  
12:00 pm  
August 2, 2023  
5005 Business Park North  
Bakersfield, CA 93309

7. **Adjournment**

The meeting was adjourned at 12:19 pm.
MEMORANDUM

To: Personnel Committee

From: Jerry Meade, Assistant Director of Head Start, Program

Date: June 7, 2023

Subject: Agenda Item 4(b): Head Start Division Reclassification of Job Descriptions – Action Item

The Head Start/State Child Development Division has updated job descriptions to align with the reorganization approved by the Board of Directors in March 2023. The updated job descriptions allow for consistency in language within each classification, as well as update antiquated language and incorporate new job descriptions for new positions that will allow for succession planning.

According to the reorganization (as revised), the positions below have been added or revised. The Head Start/State Child Development Division worked closely with the Human Resources Department on these changes and collaborated to ensure consistency with like positions within CAPK. The grading of the job descriptions aligns with the approved CAPK Compensation Schedule.

<table>
<thead>
<tr>
<th>Position Title</th>
<th>Proposed Changes</th>
<th>Current Grade</th>
<th>New Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance Specialist</td>
<td>New Position: Assuming the responsibilities of the former CACFP Coordinator. Focus on CACFP and monthly reporting to the finance department.</td>
<td>N/A</td>
<td>8 ($21.09-$31.61)</td>
</tr>
<tr>
<td>Data Analyst Supervisor</td>
<td>New Position: Focus on supervising Quality Assurance Technician and acts as a liaison with vendors, departments, and public and private agencies. The Data Analyst Supervisor will report to the Quality Assurance Administrator.</td>
<td>N/A</td>
<td>9 ($24.21-$36.36)</td>
</tr>
<tr>
<td>EHS Partnership Supervisor</td>
<td>New Position: Responsible for the Partnership program and will report directly to the Education Manager.</td>
<td>N/A</td>
<td>9 ($24.21-$36.36)</td>
</tr>
<tr>
<td>Professional Development Coordinator</td>
<td>New position. Primary focus will be staffing for the Head Start/SCD.</td>
<td>N/A</td>
<td>8 ($21.09-$31.61)</td>
</tr>
</tbody>
</table>
Enrollment Supervisor  
Revised Position: Focus on supervising Enrollment Coordinator, as well as current enrollment technicians and specialists. 
9 ($24.21-$36.36)  
N/A

Family Engagement Supervisor  
New Position: Responsible for the family engagement program and will report directly to the Support Service Manager. 
N/A  
9 ($24.21-$36.36)

Health and Nutrition Supervisor  
New Position: Responsible for the Health and Nutrition program and will report directly to the Support Service Manager.  
N/A  
9 ($24.21-$36.36)

Maintenance Manager  
New Position: Focus on supervising Maintenance Technicians and will report directly to the Assistant Director in San Joaquin County.  
N/A  
10 ($27.88-$41.80)

Wellness and Inclusion Supervisor  
New Position: Responsible for the Wellness and Inclusion Program and will report directly to the Support Services Manager. 
N/A  
9 ($24.21-$36.36)

The fiscal impact is marginal as these positions align with previously budgeted positions prior to the reorganization. The Head Start leadership team has been working in conjunction with the Finance Division to ensure the positions present are within the Head Start budget. As the reorganization continues, a budget revision will be presented to the Board, if necessary. The implementation of the reorganization, including the positions included in this presentation, will be in July 2023.

As part of the 2021-25 Strategic Plan, specifically under Goal 4: *CAPK seeks to be an employer of choice and attract and retain a high-quality workforce to achieve the organization’s desired results*, this proposal supports staff development, growth, and retention by creating a pathway for current staff or new recruits to be place in supervisory position that will increase their knowledge base and provide experience in order to have the ability to promote within the organization.

**Recommendation:**
Staff recommends the Personnel Committee approve the above-mentioned revised Head Start job descriptions.

**Attachments:**
*Head Start Organizational Chart*
*Attendance Specialist Job Description*
*Data Analyst Supervisor Job Description*
*EHS Partnership Supervisor Job Description*
*Enrollment Supervisor Job Description*
*Family Engagement Supervisor Job Description*
*Health and Nutrition Supervisor Job Description*
*Maintenance Manager Job Description*
*Professional Development Coordinator Job Description*
*Wellness and Inclusion Supervisor Job Description*
Attendance Specialist

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a jobclass. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 08  FLSA Status: Non-Exempt  Date Approved: TBD

SUMMARY:
Under supervision of the Attendance Supervisor, the Attendance Specialist performs duties related to preparing, processing, maintaining, and reviewing attendance and Child and Adult Care Food Program (CACFP) statistical or fiscal documents and records. Work is carried out under the general supervision of the Enrollment and Attendance Manager but calls for considerable independent judgment on technical matters.

SUPERVISION RECEIVED:
Receives supervision from the Attendance Supervisor.

SUPERVISION EXERCISED:
None

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Provides direct monitoring and auditing of reports generated by Attendance Technicians. Maintains a strong understanding of Child and Adult Care Food Program (CACFP), Head Start Program, Performance Standards (HSPPS), California Code of Regulations Title 5 (CDE), and Title 22 (Community Care Licensing).
- Maintains a computerized database management system for Head Start, Early Head Start, and state programs which includes, but is not limited to, completing, entering, updating, and auditing sign-in and sign-out sheets.
- Responsible for aggregating attendance data to complete monthly claims.
- Tracks and monitors all areas of attendance data for federal and state programs to ensure an error-free audit and reviews.
- Reviews various fiscal documents, reports, and payments for accuracy and completeness.
- Supports the preparation of data, budgets, and monitoring reports to be submitted to the Board of Directors, Policy Council, Head Start Regional Office, CDE, CACFP and the finance department.
- Assists with audits and federal/state reviews.
- Monitors for compliance with internal controls.
- Assist in compiling periodic, monthly, and quarterly fiscal and statistical reports.
- Conducts training for center staff as required.
- Enter all information necessary in the designated database to ensure agency compliance with all funding sources.
- Communicate effectively with agency vendors and Central Kitchen staff to ensure meals are
provided to each child at each center.

- Provides technical support to staff in related attendance, CACFP, and administrative areas.
- Performs Attendance Technician duties as needed.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Maintains a safe and functional work environment.
- Works alternative hours as required, including nights and weekends.
- Performs any other like duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
- Agency policies and procedures
- Applicable federal, state, and local laws, codes, and regulations
- Departmental policies and procedures
- Current problems of socially and economically challenged families.
- The contributions of parents and volunteers who may be non-professional.
- Modern office practices, methods, procedures, and equipment including computers.
- Word processing, spreadsheet, database, and other related software applications

Ability to:
- Deal with conceptual matters
- Plan, organize, allocate, and control substantial resources.
- Communicate effectively verbally and in writing.
- Demonstrate and apply good interpersonal skills.
- Attend evening and weekend meetings.
- Establish professional working relationships with staff, agencies, and parents.
- Effectively communicate with community members and groups, managers, agencies, and families, both individually and in group settings.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Associate degree from accredited college or university with a major in finance, social services, early childhood development, human services, behavioral science, public or business administration is required.
- Bachelor’s degree from accredited college or university with a major in finance, social services, early childhood development, human services, behavioral science, public or business administration is preferred.
- Two (2) years working in an administrative field with an emphasis on finance, social services, case management, public administration, child development, or related field.
OTHER REQUIREMENTS:

- Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
- Bilingual language fluency (Spanish/English) desirable.
- Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Sitting</th>
<th>Occasionaly Up To 4 Hours</th>
<th>Frequently 4-8 Hours</th>
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<tbody>
<tr>
<td>Hours Per Day</td>
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<td>Sitting</td>
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<td>Bending (neck)</td>
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<td>Bending (waist)</td>
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<td>CARRYING</td>
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<td>Weight Range</td>
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SUMMARY:
Under the direction of the Quality Assurance Administrator, the Data Analyst Supervisor will oversee program data collection functions and data management processes and systems, prepares routine and comprehensive assessment reports for the Head Start and State Child Development programs, as well as the supervision of the Quality Assurance Technicians. Assist in the interpretation and implementation of all aspects of Head Start/Early Head Start Performance Standards, federal and state regulations, funding source requirements, and policies/procedures.

SUPERVISION RECEIVED:
Receives supervision from Quality Assurance Administrator

SUPERVISION EXERCISED:
Quality Assurance Technicians

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Develops and maintains a database and document related to all monitoring, community assessment activities, assessment(s) of children and CLASS, and prepare such reports for presentation and analysis to management, Board of Directors, and Policy Council.
- Analyzes and makes recommendations for program information systems, data processing, and computer-based office services, plans, designs and implements new and/or modified systems that promote increased efficiency.
- Provides technical direction and assistance to staff engaged in the resolution of complex and technical problems, system modification or upgrades.
- Oversees the planning, development and implementation of automated systems, technologies, and solutions and communicates status of projects to users and project participants.
- Acts as a liaison with vendors, departments, and public and private agencies.
- Identifies the need for staff development and training and conducts user and department system training as required.
- Acts as a major resource in the preparation and analysis of advances panning activities, advising in areas of technology, and projecting current data.
- Researches, evaluates, recommends, and provides leadership in implementing technology to program and leadership staff.
• Collects, analyzes, interprets, and summarizes data in preparation to produce qualitative and quantitative routine progress reports.
• Troubleshoot problems with the data collection systems, including concerns related to relevant database applications.
• Analyze the outcomes of assessments for children, classrooms, parent surveys, staff observations (CLASS), Preschool Language Information System (PLIS), and the annual Program Information Report.

Other Job Specific Duties:
• Attend all meetings, trainings, and conferences as assigned.
• Maintain a safe and functional work environment.
• Able to work a flexible schedule that may involve evenings, weekends, and overnight travel to attend trainings or conferences.
• Is proactive in the effort to recruit and enroll families that qualify for Head Start programs.
• Perform any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
• Supervisory principles and practices
• Experience working with adults and children.
• Conducting developmental assessments of children.
• Departmental and agency policies and procedures.
• Correspondence and report writing practices and procedures.
• Current problems of socially and economically diverse families.
• Modern office practices, methods, procedures, and equipment, including computers.
• Word processing, spreadsheet, database, and related software applications.
• Proper grammar in written communication.
• Applicable federal, state, and local laws, codes, and regulations.
• Data collection.

Ability to:
• Create professional, comprehensive, and informative charts and/or graphs.
• Prepare clear and concise reports.
• Exercise the reflective supervision process, analyze problems, and identify alternative solutions.
• Maintain client dignity and ensure confidentiality.
• Plan, organize, and allocate resources.
• Work collaboratively as part of a team.
• Communicate effectively verbally and in writing.
• Maintain record-keeping and reporting systems.
• Exercise sound, independent judgment within general policy guidelines.
• Analyze problems and identify alternative solutions.
• Work with accuracy and attention to detail.
• Effectively organize and prioritize assigned work.
• Effectively communicate with community members, managers, agencies, and families, individually and in group settings.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

• Associate degree with emphasis in computer science or related field, and/or two years of progressive job-related experience with demonstrated competence to conduct comprehensive research studies and analytical projects.
• Bachelor’s degree from any accredited college or university in computer science, or related field desired.
• Any equivalent combination of education, training and experience that will demonstrate the capabilities to perform the described duties considered.
• Minimum three (3) years of experience working with computers and data analysis.
• Two (2) years of supervisory experience.

OTHER REQUIREMENTS:
• Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
• Must have reliable transportation during working hours.
• Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
• Successful completion of live scan, physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

• Work is primarily performed indoors.
• Noise level varies.
• Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be provided to enable employees with disabilities to perform the essential duties.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Hours Per Day</th>
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<th>OCCASIONALLY UP TO 4 HOURS</th>
<th>FREQUENTLY 4-8 HOURS</th>
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<tr>
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<td>0-10 lbs</td>
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<td>11-25 lbs</td>
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Early Head Start Partnership Supervisor

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 09   FLSA Status: Non-Exempt   Date Approved: TBD

SUMMARY:
Under the direction of the Education Manager, provides oversight and support to Early Head Start Child Care Partnerships (EHS CCP). Implement short term and long-range planning for service delivery, monitoring, and training. Assist in managing the Partnership staff with the integration of all content areas into the day-to-day program. Ensure all performance standards for education, nutrition, mental wellness, inclusions, health, and family engagement are in full compliance with all aspects of Early Head Start state and federal regulations. Administer effective communication among administration leadership, staff, families, and community collaborators.

SUPERVISION RECEIVED:
Receives supervision from the Education Manager.

SUPERVISION EXERCISED:
Supervision of Family Advocates

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Responsible for the oversight and support of full compliance of required regulations, performance standards, and responsibilities as written on agreements of childcare partnerships.
- Completes on-going reports based on measurable and objective criteria and related to the program service area plans and goals, transitions, enrollment, and on-going trainings.
- Works with the Education Manager to ensure budget and expenditures are in full compliance with grant requirements.
- Works with Education Manager to monitor grants and budget to actual. Reports to the Board and Policy Council monthly.
- Evaluates performance, provides mentoring, coaching, and necessary disciplinary action for assigned staff.
- Oversees and provides support to ensure delivery of services in all functional areas, utilizing internal and external resources to provide supplies and medical, social, mental health, educational, and special services as deemed appropriate.
- Conduct ongoing monitoring site visits to ensure compliance of all daily operation.
- Implements and maintains monthly management team meetings comprised of all comprehensive service areas.
- Responsible for responding to non-compliance reports and the completion of corrective action plans.
• Provides monthly comprehensive reports to the Education Manager of all performance standards and Head Start Act as it relates to the partnership and the grant.
• Works closely with the Enrollment and Attendance Team to ensure full enrollment.
• Works in partnership to support service managers and Education Manager to implement school readiness and family engagement framework.
• Ensures that effective communication is maintained between the Partnership and Head Start leadership.
• Oversees the implementation of all required assessments and screenings are completed in a timely manner.
• Manages the coordination of professional development and mentor coaching.

Other Job Specific Duties:
• Attends all meetings, trainings, and conferences as assigned.
• Maintains a safe and functional work environment.
• Works alternative hours as required, including nights and weekends.
• Is proactive in the effort to recruit and enroll families that qualify for Head Start Programs.
• Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
• Conducting developmental assessments of children.
• Departmental policies and procedures.
• Correspondence and report writing practices and procedures.
• Current problems of socially and economically diverse families.
• Modern office practices, methods, procedures, and equipment, including computers.
• Word processing, spreadsheet, database, and related software applications.
• Agency policies and procedures.
• Proper grammar in written communication.
• Applicable federal, state, and local laws, codes, and regulations
• Supervisory principles and practices

Ability to:
• Maintain client dignity and confidentiality.
• Exercise the reflective supervision process, analyze problems, and identify alternative solutions.
• Deal with conceptual matters.
• Plan, organize, allocate, and control substantial resources.
• Communicate effectively, verbally and in writing.
• Demonstrate professional interpersonal skills.
• Work collaboratively as part of a positive team.
• Work independently
• Prepare clear and concise reports.
• Attend evening and weekend meetings.
• Exercise sound, independent judgment within general policy guidelines.
• Establish professional working relationships with staff, agencies, and parents.
• Work with accuracy and attention to detail.

**EDUCATION AND EXPERIENCE:**
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

• Associate degree from any accredited college or university with major in one of the following disciplines: early childhood development, education, human development, or related field required.
• Bachelor’s degree from any accredited college or university with major in one of the following disciplines: early childhood development, education, human development, or related field preferred.
• Program Director’s permit desired. At minimum, must possess a valid Site Supervisor permit issued by the Commission for Teacher Preparation and Licensing.
• Minimum of two (2) years supervisory experience.
• One (1) year of direct experience in social service or similar programs required.

**OTHER REQUIREMENTS:**

• Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
• Must have reliable transportation during working hours.
• Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
• Must have completed a First Aid/CPR certificate or will obtain one within 90 days of employment.
• Bilingual language fluency (Spanish/English) highly desirable.
• Successful completion of live scan, physical, substance abuse screening, TB, and all required vaccinations.

**WORK ENVIRONMENT:**
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

• Work is primarily performed indoors.
• Noise level is quiet to moderately quiet.
• Hazards are minimal.

**ESSENTIAL PHYSICAL DEMANDS:**
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

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<td>EHS Partnership Supervisor</td>
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<p>| POSITION TITLE | EHS Partnership Supervisor |</p>
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Enrollment Supervisor

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 09  FLSA Status: Non-Exempt  Date Approved: TBD

SUMMARY:
Under the supervision of the Enrollment and Attendance Manager, the Enrollment Supervisor is responsible for the oversight and management of the eligibility, recruitment, selection, and enrollment of the HS/SCD Division. The Enrollment Supervisor provides management and oversight of the Head Start and California Department of Education (CDE) state contracts enrollment requirements through an auditing and monitoring process completed by the enrollment department to mitigate fraud risks. Work is carried out under the general supervision of the Enrollment and Attendance Manager but calls for considerable independent judgment on technical matters.

SUPERVISION RECEIVED:
Receives supervision from the Enrollment and Attendance Manager.

SUPERVISION EXERCISED:
Direct supervision of Enrollment Coordinator, Enrollment Specialists, and Enrollment Technicians.

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Ensures full enrollment is always maintained.
- Provides guidance and ensures compliance on procedures and overall department production related to eligibility, selection, recruitment, and enrollment.
- Conducts department performance evaluations through a scheduled monitoring, reporting, and audit process that is data driven.
- Develops staff training from data outcomes that is delivered through on-site consultation, coaching, and mentoring of staff, and group trainings that includes measurable criteria leading to quality outcomes.
- Identifies and implements strategies to ensure consistency in process and compliance of departmental procedures.
- Ensures eligibility criteria and selection processes are implemented according to regulations and funding requirements.
- Ensures documentation for eligibility and certification is accurate and in compliance according to funding sources, prior to enrollment.
- Collaborates with Attendance, Program Staff, Support Service Staff, other departments, and community members as appropriate.
- Supervises recruitment, including planning, participation in recruitment events, ordering and distribution of materials, accessing media and technology, collaborating with
community partners, and other recruitment activities to ensure compliance for the program.

- Provides technical and procedural assistance and training to administrative and program staff on ChildPlus.net and NoHo.
- Assists with audits and funding source reviews.
- Monitors for compliance with internal controls.
- Assists with developing, maintaining, and updating written policies and procedures as needed.
- Performs Enrollment Coordinator, Enrollment Specialist and Enrollment Technician duties as needed.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Maintains a safe and functional work environment.
- Works alternative hours as assigned, including nights and weekends.
- Is proactive in the effort to recruit and enroll families that qualify for CAPK programs.
- Performs other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
- Age and developmentally appropriate education practices for children age 0-5.
- Reflective supervision process, analyze problems, and identify alternative solutions.
- Experience working with adults and children.
- Conducting developmental assessments of children.
- Departmental policies and procedures.
- Correspondence and report writing practices and procedures.
- Current problems of socially and economically diverse families.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and related software applications.
- Agency policies and procedures.
- Proper grammar in written communication.
- Applicable federal, state, and local laws, codes, and regulations.

Ability to:
- Ensure confidentiality.
- Reasonably obtain knowledge of Agency policies and procedures.
- Able to deal with conceptual matters.
- Plan, organize, allocate, and control substantial resources.
- Communicate effectively, verbally and in writing.
- Demonstrate professional interpersonal skills.
- Work as a positive team member.
- Work independently
- Prepare clear and concise reports.
- Attend evening and weekend meetings.
• Exercise sound, independent judgment within general policy guidelines.
• Establish professional working relationships with staff, agencies, and parents.
• Work with accuracy and attention to detail.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

• Associate degree with emphasis in business administration, accounting, or related field.
• Bachelor’s degree from accredited college or university with a major in finance, social services, early childhood development, human services, behavioral science, public or business administration is optional.
• Three (3) years working in an administrative field with an emphasis on finance, social services, case management, public administration, child development, or related field.
• Two (2) years of supervisory experience. Any equivalent combination of education, training, and experience which will provide the capabilities to perform the described duties will be considered.

OTHER REQUIREMENTS:

• Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
• Must be fingerprinted, if required by funding source or state licensing, and have such records filed with the State Department of Social Services, Community Care Licensing.
• Bilingual language fluency (Spanish/English) desirable.
• Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

• Work is primarily performed indoors.
• Noise level is quiet to moderately quiet.
• Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

<table>
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<th>Activity</th>
<th>Hours Per Day</th>
<th>NEVER 0 HOURS</th>
<th>OCCASIONALLY UP TO 4 HOURS</th>
<th>FREQUENTLY 4-8 HOURS</th>
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<td>Activity</td>
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<tr>
<th>Weight Range</th>
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<td>11-25 lbs</td>
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<td>100+ lbs</td>
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Family Engagement Supervisor

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class. sa

Salary Range: Grade 09  FLSA Status: Non-Exempt  Date Approved: TBD

SUMMARY:
Under the direction of the Support Services Manager, the Family Engagement Supervisor is responsible for assisting in the development and planning of a comprehensive Head Start and Early Head Start program, including providing supervision, leadership, training, and technical expertise for program staff. Responsible for the ongoing monitoring, data collection, record keeping, planning, and supervision of assigned staff. Responsible for the overall compliance and requirements of all policies and procedures as outlined in the Performance Standards, Community Care Licensing and State Requirements in the Family Services Area.

SUPERVISION RECEIVED:
Receives supervision from Support Services Manager.

SUPERVISION EXERCISED:
Supervision of Family Engagement Content Area Specialists

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Ongoing research as it relates to best practices and strategies as they relate to both Family Engagement and Inclusions.
- Evaluate performance, provide training, mentoring, coaching, and any necessary disciplinary action as needed to support staff in the areas of Family Engagement and Inclusion.
- Oversees the Family Engagement and Inclusion assessment of Head Start / State Child Development participants and weekly collection of data necessary.
- Complete ongoing data monitoring, tracking, follow-up, and analysis of Family Engagement and Inclusion services to ensure analysis of department data is complete for annual reports, PIR, Self-Assessment, Attendance, Parent, Family and Community Engagement Outcomes, and School Readiness Goals.
- Ensure coordination of communication with staff, parents, program consultants, and community partners to support services to children and families.
- Coordinates referrals and follows-up with appropriate medical providers and/or LEA’s to ensure that services for children are followed up and services are delivered as required by their IFSP or IEP as appropriate.
- Support staff with necessary modifications as needed to support the least restrictive environment.
- Update Family Engagement and Inclusion procedures, forms, and service area plans in accordance with Head Start Performance Standards and applicable laws and regulations.
- Integrate Family Engagement and Inclusion education into children's curriculums.
- Attend and facilitate Inclusion committee meetings as required.
- Collaborate closely with all services areas to ensure holistic and quality services to children with inclusions and participation of family engagement.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Maintains a safe and functional work environment.
- Works alternative hours as required, including nights and weekends.
- Is proactive in the effort to recruit and enroll families that qualify for CAPK programs, including participating in recruitment events.
- Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
- Applicable federal, state, and local laws, codes, and regulations
- Agency policies and procedures.
- Regulations governing the administration of Head Start Program and State related programs desirable.
- Principles and methods of organization, planning and coordination.
- Supervisory principles and practices
- Correspondence and report writing practices and procedures.
- Current problems of socially and economically diverse families.
- Word processing, spreadsheet, database, and other related applications.
- Modern office practices, methods, procedures, and equipment, including computers.
- Departmental policies and procedures.
- Principles and techniques of training, program development, and operation.

Ability to:
- Plan, organize, allocate and control confidential data and organizational resources.
- Exercise the reflective supervision process, analyze problems, and identify alternative solutions.
- Demonstrate professional interpersonal skills.
- Maintain client dignity and confidentiality.
- Work collaboratively as part of a team.
- Deal with conceptual matters
- Work under frequent time pressures or deadlines.
- Work independently.
- Exercise sound, independent judgment within general policy guidelines.
- Provide guidance and interpret and explain policies and procedures.
- Analyze administrative, operational, and organizational problems to evaluate alternatives and reach sound solutions.
• Communicate effectively verbally and in writing.
• Gather and analyze data.
• Establish and maintain effective working relationships, internally and externally.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

• Associate degree from any accredited college or university in child development, health, or related field required.
• Bachelor’s degree from any accredited college or university in child development or health related field preferred.
• Minimum three (3) years of experience in family services and disabilities or related field.
• Minimum two (2) years of supervisory experience.
• Experience working with young children and their families is highly desirable.
• Direct experience in managing government funded programs is highly desirable.

OTHER REQUIREMENTS:
• Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
• Must have reliable transportation during working hours.
• Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
• Bilingual language fluency (Spanish/English) highly desirable.
• Successful completion of live scan, physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

• Work is primarily performed indoors.
• Noise level varies.
• Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be provided to enable employees with disabilities to perform the essential duties.

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<th>Activity</th>
<th>Hours Per Day</th>
<th>NEVER 0 HOURS</th>
<th>OCCASIONALLY UP TO 4 HOURS</th>
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<th>Weight</th>
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<td>0-10 lbs</td>
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Health and Nutrition Supervisor

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 09       FLSA Status: Non-Exempt       Date Approved: TBD

SUMMARY:
Under the direction of the Support Services Manager, the Health and Nutrition Supervisor is responsible for assisting in the development and planning of a comprehensive Head Start and Early Head Start program, including providing supervision, leadership, training, and technical expertise for program staff. Responsible for the ongoing monitoring, data collection, record keeping, planning, and supervision of assigned staff. Must ensure the overall compliance and requirements of all policies and procedures as outlined in the Performance Standards, Community Care Licensing, and state requirements in the Health and Nutrition Service Area.

SUPERVISION RECEIVED:
Receives supervision from Support Services Manager.

SUPERVISION EXERCISED:
Supervision of Health and Nutrition Content Area Specialists.

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Responsible for the ongoing research as it relates to best practices and strategies, as they relate to both health and nutrition.
- Responsible for evaluating performance, providing training, mentoring, coaching, and necessary disciplinary action as needed to support staff in the areas of health and nutrition.
- Manages the Health and Nutrition assessment of Head Start/State Child Development participants and weekly collection of data necessary.
- Complete ongoing data monitoring, tracking, follow-up, and analysis of Health and Nutrition services, to ensure data is complete for annual reports, PIR, Self-Assessment, Parent, Family and Community Engagement Outcomes, and School Readiness Goals.
- Research State Immunization Registry records to update the data system to complete required State and CSBG immunization reports.
- Monitors all injury reports and follows-up on any trends and patterns, immediately ensure all reports and follow up to medical emergencies and communicable diseases are submitted timely to appropriate agency.
- Collaborate with community agencies and oversee the annual collection of agreements from dental providers and acquire Memorandums of Understanding regarding health services and payment plans as needed.
- In collaboration with staff and Dietician, responsible for reviewing referrals, special dietary needs, and follow up on plans of action for health and nutrition concerns.
• Ensures that nutrition and growth assessments, meal changes, and hematocrit and lead screenings are conducted and completed.
• Update Health and Nutrition procedures, forms, and service area plans in accordance with Head Start Performance Standards and applicable laws and regulations.
• Integrate Health and Nutrition education into children's curriculums.
• Coordinates the Health and Nutrition Advisory Committees.

Other Job Specific Duties:
• Attends all meetings, trainings, and conferences as assigned.
• Maintains a safe and functional work environment.
• Work alternative hours as required, including nights and weekends.
• Is proactive in the program effort to recruit and enroll families that qualify for CAPK programs, including participating in recruitment events.
• Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
• Applicable federal, state, and local laws, codes, and regulations
• Agency policies and procedures.
• Regulations governing the administration of Head Start Program and State relat programs desirable.
• Principles and methods of organization, planning and coordination.
• Supervisory principles and practices
• Correspondence and report writing practices and procedures.
• Current problems of socially and economically diverse families.
• Word processing, spreadsheet, database, and other related applications.
• Modern office practices, methods, procedures, and equipment, including computers.
• Departmental policies and procedures.
• Principles and techniques of training, program development, and operation.

Ability to:
• Plan, organize, allocate and control confidential data and organizational resources.
• Exercise the reflective supervision process, analyze problems, and identify alternative solutions.
• Demonstrate good interpersonal skills.
• Work collaboratively as a positive part of a team member.
• Work with conceptual matters
• Work under frequent time pressures or deadlines.
• Supervise, mentor, and motivate a diverse group of individuals.
• Work independently.
• Exercise sound, independent judgment within general policy guidelines.
• Provide guidance and interpret and explain policies and procedures.
• Analyze and evaluate administrative, operational, and organizational problems.
• Alternative to reach sound solutions.
• Communicate effectively, verbally and in writing.
• Gather, analyze data, and report findings.
• Establish and maintain effective working relationships, internally and externally.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

• Associate degree from any accredited college or university in child development, nutrition, or health-related field required.
• Bachelor’s degree from any accredited college or university in child development, nutrition, or health related field preferred.
• Minimum three (3) years of experience in any Health/Nutrition related field.
• Minimum of two (2) years supervisory experience.
• Experience working with young children and their families is highly desirable.
• Experience working with government funded programs is highly desirable.

OTHER REQUIREMENTS:
• Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
• Must have reliable transportation during working hours.
• Must become a CPR/First Aid instructor within 90 days of employment.
• Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
• Bilingual language fluency (Spanish/English) highly desirable.
• Successful completion of live scan, physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

• Work is primarily performed indoors.
• Noise level varies.
• Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

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Maintenance Manager (Non-Represented)

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 10    FLSA Status: Exempt    Date Approved: TBD

SUMMARY:
Under general direction of the and the Head Start Assistant Director the maintenance manager does a variety of skilled and semi-skilled trades related to the construction/maintenance of buildings, grounds, and equipment, maintains related records, and ensures compliance with all required regulations.

SUPERVISION RECEIVED:
Receives supervision from the Head Start Assistant Director.

SUPERVISION EXERCISED:
Supervision of Maintenance Technicians II

DUTIES AND RESPONSIBILITIES:
Disclaimer – This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Monitors facilities work orders to ensure requests are appropriately handled and resolved in a timely manner.
- Maintains status, generates, closes, and ensures material cost and labor hours have been added in the work order system.
- Evaluates and prioritizes facilities work orders to determine assignments/scheduling in consultation with the Assistant Director.
- Consults with the Assistant Director to determine when projects should be contracted.
- Supervises and evaluates daily tasks completed by the Maintenance Technicians II.
- Provides training and ongoing support to the Maintenance Technicians II.
- Performs and/or schedules routine preventive maintenance (plumbing, electrical, and structural) to ensure proper and safe operation of the Agency facilities.
- Repairs carpentry, masonry, painting, etc. of equipment and facilities. Performs light carpentry (builds fixtures/cabinets, etc.) and paints exterior and interior surfaces.
- Organizes and maintains appropriate documentation for all facilities and maintenance jobs, projects, and equipment.
- Monitors and evaluates the quality and completion of jobs performed by contractors.
- Conducts ongoing facilities monitoring and provides reports to Assistant Director.
- Coordinates and/or performs routine emergency repairs and maintenance at all sites including evening and weekend emergency calls.
- Responds to evening and weekend alarm calls.
- Assists in the procurement of goods and services for the repairs and maintenance of...
facilities.
- Prepares basic scopes of work and schematics for bidding purposes. Works with the Director of Operations and Fiscal Specialist to finalize bid packets and gains a full understanding of the requirements of the project.
- Meets prospective bidders at the site to conduct job walks.
- Collects proposals from prospective bidders and packages them for transmittal to the Fiscal Specialist and/or Director of Operations.
- Maintains daily written records of activities, mileage, log, purchase orders, receipts, etc.
- Conducts and attends meetings and training as appropriate.
- Performs other duties as assigned.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Maintains safe and functional work environment.
- Works alternative hours as required, including nights and weekends.
- Is proactive in the program effort to recruit and enroll families that qualify for Partnership programs.
- Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Departmental policies and procedures.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and other related software applications.
- Vehicle maintenance/repair

Ability to:
- Deal with conceptual matters. Plan, organize, allocate, and control substantial resources.
- Communicate effectively.
- Demonstrate good interpersonal skills.
- Attend evening and weekend meetings.
- Effectively present program information to the public.
- Establish professional working relationships with staff, agencies, and parents.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- High School diploma or equivalent.
- Five (5) years of work experience and verifiable knowledge of building construction and/or maintenance repair.
- Two (3) years supervisory experience in building and/or construction/maintenance.

Maintenance Manager
OTHER REQUIREMENTS

- Possession of a valid California Driver’s License and State automobile insurance, and acceptable driving record substantiated by a DMV printout.
- Successful completion of a physical, substance abuse screening, TB, and all required vaccinations.
- Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
- Bilingual language fluency (Spanish/English) fluency highly desirable.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal to moderate in doing routine/preventative maintenance as well as physical/safety hazards in doing repair work.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

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<tr>
<th>ACTIVITY (HOURS PER DAY)</th>
<th>NEVER 0 HOURS</th>
<th>OCCASIONALLY UP TO 4 HOURS</th>
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Maintenance Manager
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Maintenance Manager
Professional Development Coordinator

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 8  FLSA Status: Non-Exempt  Date Approved: TBD

SUMMARY:
Under the direction of the Professional Development Manager, the Professional Development Coordinator is responsible for developing and maintaining the Head Start and State Child Development Division’s comprehensive professional development systems and leading the Professional Development department with monitoring staff development data. The Professional Development Coordinator will support Head Start leadership with evaluating the professional growth needs of the program, assisting with the implementation of Head Start/Early Head Start Performance Standards, federal and state regulations, Community Care Licensing regulations, funding source requirements, and policies/procedures as they relate to staff ratios and staff qualifications.

SUPERVISION RECEIVED:
Receives supervision from Professional Development Manager.

SUPERVISION EXERCISED:
None.

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- In conjunction with Head Start leadership, develops and maintains Professional Growth Plan procedures.
- Provides guidance and documents course work, continuing education, certificates, and other Professional Growth opportunities for staff.
- Develops resources and partnerships within the community to facilitate professional development activities, e.g., colleges, universities, and other educational opportunities.
- Monitors staff qualifications as required by federal and state requirements.
- Ensures training event documentation and record keeping is current.
- Ensures compliance with the Head Start Performance Standards, Community Care Licensing requirements, and state funding terms and conditions.
- Write proposal and grant applications, including the development, oversight, and monitoring of the HS/EHS Training and Technical Assistance Grant.
- Interface with local schools and businesses to design and implement a range of public relations efforts to attract Early Childhood Education careers for staff, program parents, and volunteers while building public awareness of Head Start in our communities.
- Utilize a range of current and modern job-related equipment, computer hardware, software applications, and best practices, and maintains records and database information on
prospective, past, and current.
- Coordinates special program/agency events through effective project planning and assuming responsibility for the special event and/or activity.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Maintains a safe and functional work environment.
- Works alternative hours as required, including nights and weekends.
- Is proactive in the effort to recruit and enroll families that qualify for Partnership programs.
- Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Departmental policies and procedures.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and related software applications.
- Principles and techniques of training, program development, and operation.
- Problems of socially and economically challenged families.
- The contributions of parents and volunteers who may be non-professional.

Ability to:
- Deal with conceptual matters.
- Plan, organize, allocate, and control substantial resources.
- Communicate effectively, verbally and in writing.
- Demonstrate good interpersonal skills.
- Attend evening and weekend meetings.
- Effectively present program information to the public.
- Establish professional working relationships with staff, agencies, community partners, and parents.
- Reasonably obtain knowledge of Agency and departmental policies and procedures.

EDUCATION AND EXPERIENCE:
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Associate degree from an accredited college in business administration, human resources development, education administration or closely related field required.
- Bachelor’s degree from an accredited college in business administration, human resources development, education administration or closely related field preferred.
- Three (3) years’ progressive administrative experience and community outreach in public or non-profit programs, or related field.
• Minimum two (2) years working in administration or related human resources experience.

OTHER REQUIREMENTS:

• Possession of a valid California driver's license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
• Must be fingerprinted and have such records filed with the Department of Justice and the State Department of Social Services and Community Care Licensing.
• Bilingual language fluency (Spanish/English) desirable.
• Successful completion of physical, substance abuse screening, TB, and all required vaccinations.

WORK ENVIRONMENT:
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

• Work is primarily performed indoors.
• Noise level is quiet to moderately quiet.
• Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable employees with disabilities to perform the essential duties.

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<th>Activity</th>
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<th>OCCASIONALLY UP TO 4 HOURS</th>
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Reaching (below shoulder level) | x
Wellness and Inclusion Supervisor

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 09    FLSA Status: Non-Exempt    Date Approved: TBD

SUMMARY:
Under the direction of the Support Services Manager, the Wellness and Inclusion Supervisor is responsible for assisting in the development, planning, and delivery of services complies with all the pertinent regulations, as well as developing, present, and ensures implementation of training programs for staff, parents, and volunteers. Responsible for the ongoing monitoring, data collection, record keeping, planning, and supervision of assigned staff. Responsible for the overall compliance and requirements of all policies and procedures as outlined in the Performance Standards, Community Care Licensing and State Requirements in the Family Services and Disabilities Service Area

SUPERVISION RECEIVED:
Receives supervision from the Support Services Manager.

SUPERVISION EXERCISED:
Supervision of the Content Area Specialist-Family Wellness and Content Area Specialist-Inclusion.

DUTIES AND RESPONSIBILITIES:
Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:
- Provide ongoing professional development through child development, role modeling, mentoring, and training that supports Parent, Family and Community Engagement Framework and School Readiness Agency Plan for staff and parents.
- Develop, arrange, and schedule Family Education Trainings.
- Identify and provide family services to parents, staff, consultants, community partners, policy council as requested, including new hire orientation and other mandated training.
- Analysis of a variety of data sources to facilitate consistent comprehensive quality program operations.
- Research Family Services (including Information Memorandums) to provide information and support to appropriate staff.
- Collaborate with Content Area Specialist, Education Manager, Program Managers, and Mentor Coaches to provide monitoring, training and/or intervention.
- Collaborate with management to ensure regulations are being followed and create and implement appropriate monitoring systems and reports to include service area plans, and goals and objectives.
- Collaborate with community agencies to ensure services to families are met, including mental health.
Ongoing research into mental health trends to provide the latest strategies and techniques to appropriate staff.

Assist with facilitating Policy Council and parent committees in communicating with parents to ensure that they understand their rights, responsibilities, and opportunities in the program and to encourage their participation in the program and volunteer their services for in-kind.

Responsible for assisting with the interpretation and implementation of all aspects of Head Start/Early Head Start Performance Standards, State and Federal regulations, funding source requirements, and policies and procedures.

Model communication and interactions that respects all individuals and their languages, abilities, religions, and cultures.

Other Job Specific Duties:
- Attends all meetings, trainings, and conferences as assigned.
- Maintains safe and functional work environment.
- Work alternative hours as required, including nights and weekends.
- Is proactive in the program effort to recruit and enroll families that qualify for CEDS programs.
- Performs any other duties as assigned.

MINIMUM QUALIFICATIONS:
The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:
- Conducting developmental assessments of children.
- Departmental policies and procedures.
- Correspondence and report writing practices and procedures.
- Current problems of socially and economically diverse families.
- Modern office practices, methods, procedures, and equipment, including computers.
- Word processing, spreadsheet, database, and related software applications.
- Agency policies and procedures.
- Proper grammar in written communication.
- Applicable federal, state, and local laws, codes, and regulations

Ability to:
- Reasonably obtain knowledge of Agency policies and procedures.
- Exercise the reflective supervision process, analyze problems, and identify alternative solutions.
- Deal with conceptual matters.
- Plan, organize, allocate, and control substantial resources.
- Maintain client dignity and confidentiality.
- Communicate effectively, verbally and in writing.
- Work collaboratively as part of a team.
- Work independently.
- Prepare clear and concise reports.
- Attend evening and weekend meetings.
Wellness and Inclusion Supervisor

- Exercise sound, independent judgment within general policy guidelines.
- Establish professional working relationships with staff, agencies, and parents.
- Work with accuracy and attention to detail.

**EDUCATION AND EXPERIENCE:**
The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- Associate degree from any accredited college or university within one of the following disciplines is desired: Human Development, Family Development, Social Services, Psychology, and Sociology. Additional experience may be substituted for education requirements required.
- Bachelor’s degree from any accredited college or university within one of the following disciplines is desired: Human Development, Family Development, Social Services, Psychology, and Sociology preferred. Minimum three (3) years of case management experience in family services with Head Start, Early Head Start, social service program, or related group work and community organizations.
- Minimum of two (2) years of supervisory experience.

**OTHER REQUIREMENTS:**
- Possession of a valid California Driver’s License and State automobile insurance, and acceptable driving record substantiated by a DMV printout.
- Must have reliable transportation during work hours.
- Must be fingerprinted and have such records filed with the State Department of Social Services, Community Care Licensing.
- Successful completion of live scan, physical, substance abuse screening, TB, and all required vaccinations.
- Bilingual language fluency (Spanish/English) fluency highly desirable.

**WORK ENVIRONMENT:**
The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level varies.
- Hazards are minimal.

**ESSENTIAL PHYSICAL DEMANDS:**
The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Hours Per Day</th>
<th>NEVER 0 HOURS</th>
<th>OCCASIONALLY UP TO 4 HOURS</th>
<th>FREQUENTLY 4-8 HOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sitting</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Walking</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Standing</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Bending (neck)</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Activity</td>
<td>LIFTING</td>
<td>CARRYING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------</td>
<td>------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>NEVER 0 HOURS</td>
<td>OCCASIONALLY UP TO 4 HOURS</td>
<td>FREQUENTLY 4-8 HOURS</td>
<td>NEVER 0 HOURS</td>
</tr>
<tr>
<td>Bending (waist)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Squatting</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Climbing</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kneeling</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crawling</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twisting (neck)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twisting (waist)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simple Grasping (right hand)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simple Grasping (left hand)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power Grasping (right hand)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power Grasping (left hand)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fine Manipulation (right hand)</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Fine Manipulation (left hand)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pushing &amp; Pulling (right hand)</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Pushing &amp; Pulling (left hand)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reaching (above shoulder level)</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Reaching (below shoulder level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Lifting and carrying weight:

- **NEVER**: 0 hours
- **OCCASIONALLY**: Up to 4 hours
- **FREQUENTLY**: 4-8 hours

<table>
<thead>
<tr>
<th>Weight Range</th>
<th>Lifting</th>
<th>Carrying</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10 lbs</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>11-25 lbs</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>26-50 lbs</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>51-75 lbs</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>76-100 lbs</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>100+ lbs</td>
<td>x</td>
<td></td>
</tr>
</tbody>
</table>
Program Review & Evaluation Committee Minutes

1. **Call to Order**

   Committee Chair Ana Vigil called the meeting to order at 12:03 pm at the Community Action Partnership of Kern Administrative Building, located at 5005 Business Park North, Bakersfield, CA.

2. **Roll Call**

   Roll call was taken with a quorum present.

   Present: Ana Vigil, Jimmie Childress, Mia Cifuentes, Gina Martinez, and Yolanda Ochoa

   Absent: None

   Others Present: Jeremy Tobias, Chief Executive Officer; Rebecca Moreno, Director of Housing Services; Pritika Ram, Chief Business Development Officer; Yolanda Gonzales, Director of Head Start/State Child Development; Emilio Wagner, Director of Operations; and other CAPK staff.

3. **Public Comments**

   No one addressed the Committee.

4. **Program Presentation**

   1. Coordinated Entry System (CES), Joseph Aguilar, Homeless Services CES Program Manager, and California Advancing and Innovating Medi-Cal (CalAIM) by Rebecca Moreno, Director of Housing and Supportive Services

   Rebecca Moreno provided an update on the Coordinated Entry System and said CAPK is contracted with the Bakersfield Kern Regional Homeless Collaborative to operate the CES for the counties Continuum of Care (CoC). Rebecca highlighted the new Coordinated Entry logo and provided the highlights identified on the attached slides.

   Joseph Aguilar provided an update on what the Coordinated Entry team did the past year. Joseph introduced the new program CalAIM and said that CAPK is currently partnered with Kern Health Systems. Joseph proudly said that they have housed nineteen clients, and not a lot of them had gone through the homeless response system, and that staff provided the support and had open conversations with the clients looking further into their barriers and addressing them effectively. Joseph said staff are always promoting the services and trying to engage with community members who may not know about the services.

   Ana Vigil asked about the locations in Shafter. Rebecca provided the location information for the Richland Family Resource Center in Shafter and the Family Resource Center in Lake Isabella.

   Yolanda Ochoa asked if there is a particular day of the week that CAPK will be at the Resource Centers in Lake Isabella. Joseph said the days can vary since they currently travel with HEAP on the 1st or 3rd Tuesday
of the month, or whichever day they are allowed to travel. Yolanda requested to speak with staff after the meeting to discuss the number of homeless individuals going to the Salvation Army.

Jimmy Childress asked about the likelihood of clients getting housing, and asked if CAPK has a supply of houses waiting. Rebecca said the homeless individuals are competing for the units that everyone else is competing for and said the housing inventory in Kern County is low and is very competitive. Rebecca said the program started in February 2023 and since then, the team has been able to house nineteen clients.

Jimmy Childress asked if there are dedicated staff within the organization that is tasked with looking for more housing units. Rebecca said they don’t have anyone within the agency who does the landlord engagement, however, they do have some of those positions within the CoC that share the information and also have an app software that is called Padmission they utilize as the CoC.

Rebecca Moreno said part of the CalAIM Services is sustainability, once housed, the clients are provided with six months of case management services, which includes budget education, identifying what constitutes a lease violation, and to ensure the client is supported to help them stay in their housing.

Jimmy Childress stressed that there should be a position within CAPK where the primary function is to search for housing or for an old facility that could be rehabbed and brought up to standard. Pritika said it’s not feasible at this point in time to staff a position like that, and there isn’t enough funding for staff to follow the client year after year, but it might be something to consider in the future.

Ana Vigil said six months is a good amount of time to track people, and they will usually come back when they need support.

Gina Martinez said she agrees with six months and added that unemployment will give you that guarantee of six months to gain financial literacy.

Jimmy Childress said there is a new housing funding in FHA for $5 million and a 501(c)3 qualifies to apply, however, there is a lot of red tape that is difficult to get people in. Jimmy recommended that staff engage with local banks to inquire about the Community Reinvestment Act to solicit funding.

Pritika Ram emphasized that staff is working with available resources, and part of the Strategic Plan Goal 3 is to investigate other available options.

Mia Cifuentes said she wants to know more about the Bakersfield College Leadership Program. Pritika said last year they had an opportunity through Bakersfield College to offer non-credit no-cost professional development to our management team. Pritika said CAPK had fourteen graduates this past cohort and because of the successful turnout, there will be a second cohort for internal staff to provide professional development for CAPK staff at no cost. Pritika said Dr. Wright sent the communication through constant contact and will ask Paula to forward it to the Board as well. Gina Martinez asked if it’s available for the Board. Pritika said she will ask Dr. Wright. Jeremy clarified that the BC Leadership Program was set up for staff professional development agency wide, not only for the CES program.

Gina Martinez asked if CES will provide services in Delano. Rebecca said there are partner agencies providing services in Delano but said staff will be expanding their outreach to Delano soon.

Gina Martinez & Ana Vigil thanked the staff for the detailed presentation.
5. **New Business**

a. **May 2023 Program Reports – Pritika Ram, Chief Business Development Officer** - *Action Item*

Pritika Ram presented the May 2023 Program Reports for approval and provided notable highlights for WIC, 2-1-1, Operations, and HR’s efforts with staff recruitment.

Motion was made and seconded to approve the May 2023 Program Reports. Carried by unanimous vote (Childress/Cifuentes).

b. **May 2023 Application Status Report & Funding Profiles – Vanessa Mendoza, Grant Administrator** – *Action Item*

Vanessa Mendoza presented the above action item for approval and provided a summary of the May status report.

Gina Martinez asked if staff receives an explanation of why grant applications are denied. Vanessa said not all denial notices include feedback, however, for the denials that do include feedback, it is an opportunity for staff to review if opportunities were missed in the application process.

Gina asked if there is a file where this feedback is kept and looked at so if an opportunity comes up there is a to-do list on file. Vanessa said yes, there is.

In regard to the VITA report, Gina Martinez said one of the things that she sees personally is that many individuals don’t have documents, such as a Driver’s License or California ID card and asked if individuals could still open a bank account and get financial literacy education. Vanessa said yes, and the great thing about having relationships like the one with Tri-Counties is that a lot of the conversation includes best practices, and advocacy.

Ana Vigil asked if the cooking funding is for the whole year or the summer. Vanessa said the application was denied, but Angie Nelson, Program Manager at Shafter Youth Center has a connection with an individual that’s a chef. Angie received a quote involving the health nutrition component and for an actual cooking demonstration where the children would engage in discussions and partake in the meal after. Ana said Wasco High School has a culinary program and suggested maybe reaching out to the teacher to inquire about providing a summer program if not the whole year. Ana said that in the rural areas there are many obese children that do not know what to eat, or they are not eating properly, nor do they have the ability to participate in sports because of the cost. Ana requested time with Vanessa to discuss this topic further after this committee meeting.

Motion was made and seconded to approve the May 2023 Application Status Report & Funding Profiles. Carried by unanimous vote (Ochoa/Cifuentes).


Rebert Espinosa presented the above action item for approval and provided a summary of the May status report.
Robert Espinosa reported that staff participated in a job resource fair in San Joaquin County and conducted 17 on-the-spot interviews. Robert said some of the candidates did not pass their credentials and background check, but he said it was a great success for Human Resources and the Kern staff.

Ana Vigil asked how many units are required for early childhood development. Robert said with Early Head Start, 3 units are required and for Head Start, 6 units plus transcripts. Yolanda Ochoa asked if CAPK provides assistance to staff members who are interested in expanding their education. Robert said there are opportunities for staff to be placed on an education plan.

Motion was made and seconded to approve the staff’s recommendation. Carried by unanimous vote (Martinez/Ochoa).

d. 2021-2025 Strategic Plan Update – Info Item

1. Goal Group 2 Update – Yolanda Gonzalez, Director of Head Start / State Child Development

Yolanda Gonzales provided updates on the Bakersfield College leadership courses, the HS Parent Resource Fair scheduled for June 10th, the Workforce Fair at Rafer Johnson School on June 16th, and the upcoming CAPK Job Fair on June 23rd.

Ana Vigil asked about the education plan for existing Head Start staff. Yolanda replied that many of the staff are currently on an education plan and are encouraged to take part in the education offered by CAPK to move up. Yolanda stressed that there is a nationwide shortage of early childhood education teachers and said that parents are encouraged to apply. Yolanda shared that she got her start as a Head Start parent and participated in the education opportunities provided to her from CAPK.

Gina Martinez asked if there are vacant positions in Delano. Yolanda said they are well staffed in Delano.

2. Goal Group 3 Update – Rebecca Moreno, Director of Housing & Supportive Services

Rebecca Moreno provided an update for Goal 3 and Gina Martinez asked if volunteers have the opportunity to apply for vacant positions. Rebecca said there is opportunity for several of the programs, but volunteers are encouraged to continue volunteering to build their capacity until the time they can secure employment. Ana Vigil asked if there is a stipend for volunteers, and Rebecca said they use donated items as incentives. Ana then asked if Board Members can participate in the Goal Groups. Pritika Ram replied that the Board has received invitations to participate, and she will ask the goal group leads to reach out to the Board Members again.

3. Goal Group 3 Update – Emilio Wagner, Director of Operations

Emilio Wagner reported that Goal Group 3 had intended to demonstrate the client data platform, but they are going through staffing changes and were not able to provide the demonstration. Emilio said the new IT Administrator is working to fill the open positions and the group is hopeful they can provide a demonstration at the August meeting to show how programs can benefit from making data driven decisions.
3. Committee Member Comments

- Yolanda Ochoa mentioned she had the opportunity to go to Phoenix to the National Head Start Association Conference and said so many things have changed since the last time she attended, and thanked Yolanda Gonzales and Jeremy Tobias for the opportunity, and also and said that CAPK was well represented at the conference.

- Ana Vigil said she also attended the NHSA conference, and she was also impressed with how well-known CAPK is within the Head Start community and the staff representation at the conference.

4. Next Scheduled Meeting

Program Review & Evaluation Committee
12:00 pm
August 9, 2023
5005 Business Park North
Bakersfield, CA  93309

5. Adjournment

The meeting was adjourned at 1:20 pm
HUD
Definition of Homelessness

- HUD’s definition of homelessness is organized into 4 categories
  - Category 1: Literally Homeless
  - Category 2: Imminent Risk of Homelessness
  - Category 3: Homeless Under Other Federal Statutes (McKinney Vento Youth)
  - Category 4: Fleeing/Attempting to Flee Domestic Violence

- HUD also separately defines chronic homelessness
Category 1: Literally Homeless

- **DEFINITION:** An individual or family who lacks a fixed, regular, adequate nighttime residence, meaning-
  - Has a primary nighttime residence that is a public or private place not mean for human inhabitation
Category 2: Imminent Risk of Homelessness

**DEFINITION:** Individual or family who will immediately lose their primary nighttime residence, provided that:

- Residence will be lost within 14 days of the date of application or homeless assistance
- No subsequent residence has been identified; and
- The individual or family lacks the resources or support networks needed to obtain other permanent housing.
Category 4: Fleeing/Attempting to Flee Domestic Violence

**DEFINITION:** Any individual or family who:
- Is fleeing, or is attempting to flee, domestic violence
- Has no other residence; and
- Lacks the resources or support networks to obtain other permanent housing
Why do we use Coordinated Entry?

- The US Department of Housing and Urban Development (HUD) requires that Continuums of Care (CoC) establish and operate a coordinated entry (CE) process—and that recipients of CoC Program and Emergency Solutions Grants (ESG) program funding within the CoC’s must use that CE process.

Once an VI-SPDAT is completed, the client is placed on the Prioritization Match List and prioritized by vulnerability score, chronicity, and disability.

**Homeless**

1st Priority: Chronically homeless: A person that has been homeless for 12 consecutive months, or homeless 3 times in the last 4 years equal to 12 months and has a chronic disability.

2nd Priority: Not Chronic, with a Disability and score of 9 or greater.

3rd Priority: Not Chronic, with a Disability and score of 8 or less.

4th Priority: Person with a Disability enrolled in a Transitional Housing Program.

5th Priority: Not Chronic, No Disability.

******************************************************************************

**At Risk of Homelessness**

1st Priority: Court ordered eviction, 60/30 Day Notice, Notice to Vacate, or 3 Day Pay or Quit.

2nd Priority: Lacks a permanent nighttime residence (couch surfing, staying with family or friends)
CalAIM

- CalAIM is a new initiative by the Department of Health Care Services (DHCS) to improve the quality of life and health outcomes of Medi-Cal beneficiaries by implementing broad delivery of system, programmatic, and payment system reforms.
- Under the CalAIM Case Management partnership, CAPK would serve as a Community Support agency providing rental assistance and other support for clients.
- Housing Navigators will perform Housing Search and Stabilization services by assisting members in their search for housing, completion of rental applications, securing required documentation for housing applications, and provision of rental assistance payments. The Housing Navigators' program goals for members will include reducing housing barriers, preventing homelessness, and connecting individuals to services that promote stable housing.
2022-2023 Highlights

- 10 Outreach events
- Milestone Housing Project, Stuff the Bus, Veteran Stand Down, Career Expo, Haven Drive Middle School, Shafter Family Resource, HDMC Community Resource Fair, Financia Fest, CSV Health and Resource Fair
- 2023 Point in Time Count
- Univision Interview: Somos Kern
- Added 3 Access Points: Shafter, Lake Isabella, Mojave
- BC Leadership program
2022-2023 Highlights

- 14,232 households served through CAPK CES staff in 2022
- 7,156 households served through CAPK CES staff in 2023
- 624 referrals through Cal-AIM
- 220 enrolled in the Cal-AIM project
- 11 housed through Cal-AIM
Rebecca Moreno, Director of Housing & Supportive Services
(661)379-8221 or (661)336-5236 ext. 1150
rmoreno@capk.org

Joseph Aguilar, CES Program Manager
(661)407-2855 ext.: 4255
jaguilar@capk.org
Housing and Supportive Services

Coordinated Entry Services
M Street Homeless Navigator Center
CalAIM - Homeless Services
## Community Action Partnership of Kern
### Monthly Report 2023

<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Work Unit</th>
<th>Coordinated Entry Services (CES)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division/Director</td>
<td>Rebecca Moreno</td>
<td>Program Manager: Joseph Aguilar</td>
</tr>
<tr>
<td>Reporting Period</td>
<td>January 1, 2023 - December 31, 2023</td>
<td></td>
</tr>
</tbody>
</table>

### Program Description

Coordinated Entry Services (CES) is the system to assist communities in ending homelessness by providing a clear and systematic pattern for helping individuals to quickly access the most appropriate services available through standardized access, a standardized assessment process, and a coordinated referral (match) process for individuals to preventions, housing, and/or other related services. The following counties are currently being served by CAPK CES, Kern County.

### Homeless Referrals/Assessments (SRV 7c)

<table>
<thead>
<tr>
<th></th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kern County</td>
<td>2,307</td>
<td>7,159</td>
<td>14,000</td>
<td>49%</td>
<td>51%</td>
</tr>
</tbody>
</table>

### Pending Assessments

<table>
<thead>
<tr>
<th></th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kern Pending contact/call back</td>
<td>0</td>
<td>0</td>
<td>15</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Performance: Number of applicants who received a response within 24 Hours

<table>
<thead>
<tr>
<th></th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kern County</td>
<td>1,934</td>
<td>6,271</td>
<td>11,000</td>
<td>53%</td>
<td>57%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)

This month CES has received 1,000 calls over our monthly average. At one point, we had 3 FTE's out for various reasons. Staff have been working OT including weekends to manage the call volume.

### Program Strategic Goals

1. Make CES more accessible for rural and non-shelter homeless individuals
   - HHAP 3 grant approved for Mojave Drop in Center. Meeting with Tehachapi Collaborative 6/5/23.

2. Increase staff recruitment and retention.
   - Wage adjustment processed for all staff. 2 FTE positions pending offers

3. Build provider network support with KHS-CES
   - Data exchange has been fully automated. Continued monthly meetings.

### Program Highlights

- 1. Make CES more accessible for rural and non-shelter homeless individuals
  - HHAP 3 grant approved for Mojave Drop in Center. Meeting with Tehachapi Collaborative 6/5/23.

- 2. Increase staff recruitment and retention.
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# Community Action Partnership of Kern
## Monthly Report 2023
### Month

<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Work Unit</th>
<th>M Street Navigation Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Division/Director

<table>
<thead>
<tr>
<th>Division/Director</th>
<th>Program Manager</th>
<th>Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebecca Moreno</td>
<td>Laurie Hughey</td>
<td>January 1, 2023 - December 31, 2023</td>
</tr>
</tbody>
</table>

### Program Description
CAPK operates the 147-bed homeless Low Barrier Navigation Center in partnership with the County of Kern. This 24-hour shelter offers housing, meals and an array of mental health, medical care and economic resources to unsheltered individuals with pets and partners.

### Shelter Services

<table>
<thead>
<tr>
<th>Shelter Services</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Residents (Assigned Beds) (FNPI 4a &amp; SRV 7b, SRV 4m)</td>
<td>124</td>
<td>641</td>
<td>1,000</td>
<td>149%</td>
<td>64%</td>
</tr>
<tr>
<td>Total Clients Served</td>
<td>234</td>
<td>1,132</td>
<td>2,400</td>
<td>117%</td>
<td>47%</td>
</tr>
<tr>
<td>Pets (i.e., kennel, emotional support assistance and service pet)</td>
<td>6</td>
<td>34</td>
<td>100</td>
<td>72%</td>
<td>34%</td>
</tr>
<tr>
<td>Residents Under 90 days length of stay</td>
<td>81</td>
<td>397</td>
<td>700</td>
<td>139%</td>
<td>57%</td>
</tr>
<tr>
<td>Exits to Permanent Housing (FNPI 4b)</td>
<td>5</td>
<td>57</td>
<td>100</td>
<td>60%</td>
<td>57%</td>
</tr>
<tr>
<td>Exits-Self</td>
<td>13</td>
<td>83</td>
<td>150</td>
<td>104%</td>
<td>55%</td>
</tr>
<tr>
<td>Exits-Involuntary</td>
<td>99</td>
<td>383</td>
<td>700</td>
<td>170%</td>
<td>55%</td>
</tr>
<tr>
<td>Case Management Services (SRV 7a)</td>
<td>688</td>
<td>3,124</td>
<td>8,000</td>
<td>103%</td>
<td>39%</td>
</tr>
<tr>
<td>Critical Incidents</td>
<td>33</td>
<td>154</td>
<td>250</td>
<td>158%</td>
<td>62%</td>
</tr>
<tr>
<td>Shelter Residents Meals (SRV 5ii)</td>
<td>6,812</td>
<td>31,554</td>
<td>60,000</td>
<td>136%</td>
<td>53%</td>
</tr>
<tr>
<td>Number of Volunteers (duplicated)</td>
<td>378</td>
<td>706</td>
<td>100</td>
<td>4536%</td>
<td>706%</td>
</tr>
<tr>
<td>Volunteers Hours (duplicated)</td>
<td>95</td>
<td>1,453</td>
<td>1,500</td>
<td>76%</td>
<td>97%</td>
</tr>
</tbody>
</table>

### Safe Camping

<table>
<thead>
<tr>
<th>Safe Camping</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total clients served (SRV 7b)</td>
<td>61</td>
<td>382</td>
<td>500</td>
<td>146%</td>
<td>76%</td>
</tr>
<tr>
<td>Current client census</td>
<td>41</td>
<td>249</td>
<td>300</td>
<td>164%</td>
<td>83%</td>
</tr>
<tr>
<td>Meals (SRV 5ii)</td>
<td>2,382</td>
<td>13,711</td>
<td>15,000</td>
<td>191%</td>
<td>91%</td>
</tr>
<tr>
<td>Pets</td>
<td>15</td>
<td>80</td>
<td>75</td>
<td>240%</td>
<td>107%</td>
</tr>
<tr>
<td>Clients moved to Shelter (SRV 4m)</td>
<td>0</td>
<td>5</td>
<td>50</td>
<td>0%</td>
<td>10%</td>
</tr>
<tr>
<td>Exits to Permanent Housing (FNPI 4b)</td>
<td>0</td>
<td>11</td>
<td>40</td>
<td>0%</td>
<td>28%</td>
</tr>
<tr>
<td>Exits-Self</td>
<td>4</td>
<td>21</td>
<td>50</td>
<td>96%</td>
<td>42%</td>
</tr>
<tr>
<td>Exits-Involuntary</td>
<td>2</td>
<td>60</td>
<td>75</td>
<td>32%</td>
<td>80%</td>
</tr>
<tr>
<td>Critical Incidents</td>
<td>1</td>
<td>23</td>
<td>100</td>
<td>12%</td>
<td>23%</td>
</tr>
</tbody>
</table>

### Safe Parking

<table>
<thead>
<tr>
<th>Safe Parking</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total clients served</td>
<td>10</td>
<td>38</td>
<td>50</td>
<td>240%</td>
<td>76%</td>
</tr>
<tr>
<td>Current client census</td>
<td>10</td>
<td>38</td>
<td>50</td>
<td>240%</td>
<td>76%</td>
</tr>
<tr>
<td>Clients moved to Shelter (SRV 4m)</td>
<td>0</td>
<td>0</td>
<td>25</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)
Clients are not wanting to move into the shelter, they are comfortable with less structure, and not wanting to exit Safe Camp area. Only one incident requiring a critical incident report in Safe Camp, clients pet bit the security guard.

### Program Strategic Goals

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1
1. Number of clients participating in job training program, (i.e. Project Hire-Up, financial Literacy, Recycling Lives, Open Door Network)  
Three clients participating in this next Project Hire-Up cohort, 6 completed the Financial Literacy classes with Chase Bank. 11 clients working in various jobs out in the community, and one client attending CSUB, and one attending UEI.

2. Increase job retention/recruitment at M street by (1) developing job descriptions that accurately reflect job performance and (2) regrading/classification of job descriptions.  
There are 3 remaining job descriptions that need to be repointed Volunteer Coordinator, Program Coordinator and Transport Driver. Director of Housing and Supported Services will be presenting those job descriptions at the next Personal Committee meeting on 5/10/23.

The M Street packets have been submitted for review, still under corrections from leadership. PA is reviewing the P & P's to make adjustments for current program procedures.

4. Increase the number of clients who transition to permanent housing by 15% from the prior year (2022 - 99) to 114 clients.  
57 clients obtained permanent supportive housing after 5 months of service.

### M Street Navigation Center - Client Demographic Information

<table>
<thead>
<tr>
<th>Race Demographic</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>21</td>
</tr>
<tr>
<td>25 - 34</td>
<td>48</td>
</tr>
<tr>
<td>35 - 44</td>
<td>55</td>
</tr>
<tr>
<td>45 - 54</td>
<td>53</td>
</tr>
<tr>
<td>55 - 61</td>
<td>36</td>
</tr>
<tr>
<td>62+</td>
<td>21</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>234</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Race Demographic</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Indian or Alaska Native</td>
<td>7</td>
</tr>
<tr>
<td>Asian</td>
<td>4</td>
</tr>
<tr>
<td>Black or African American</td>
<td>56</td>
</tr>
<tr>
<td>Native Hawaiian or Other Pacific Islander</td>
<td>2</td>
</tr>
<tr>
<td>White</td>
<td>154</td>
</tr>
<tr>
<td>Multiple races</td>
<td>6</td>
</tr>
<tr>
<td>Client Don't know / Refused</td>
<td>5</td>
</tr>
<tr>
<td>No Answer</td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>234</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>94</td>
</tr>
<tr>
<td>Male</td>
<td>138</td>
</tr>
<tr>
<td>Trans Female (MTF or Male to Female)</td>
<td></td>
</tr>
<tr>
<td>Trans Male (FTM or Female to Male)</td>
<td></td>
</tr>
<tr>
<td>Not specified</td>
<td>41</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>234</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Month</th>
<th>Zip Code</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>93301</td>
<td>49</td>
<td>93241</td>
<td>1</td>
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<tr>
<td>93304</td>
<td>29</td>
<td>90004</td>
<td>1</td>
</tr>
<tr>
<td>93305</td>
<td>19</td>
<td>90056</td>
<td>1</td>
</tr>
<tr>
<td>93306</td>
<td>12</td>
<td>93250</td>
<td>1</td>
</tr>
<tr>
<td>93307</td>
<td>13</td>
<td>93036</td>
<td>1</td>
</tr>
<tr>
<td>93308</td>
<td>25</td>
<td>96001</td>
<td>1</td>
</tr>
<tr>
<td>93309</td>
<td>9</td>
<td>93555</td>
<td>1</td>
</tr>
<tr>
<td>93311</td>
<td>5</td>
<td>92410</td>
<td>1</td>
</tr>
<tr>
<td>93312</td>
<td>2</td>
<td>93268</td>
<td>1</td>
</tr>
<tr>
<td>93313</td>
<td>3</td>
<td>93280</td>
<td>3</td>
</tr>
<tr>
<td>93314</td>
<td>1</td>
<td>93283</td>
<td>1</td>
</tr>
<tr>
<td>90212</td>
<td>1</td>
<td>93285</td>
<td>1</td>
</tr>
<tr>
<td>93516</td>
<td>1</td>
<td>45426</td>
<td>1</td>
</tr>
<tr>
<td>93206</td>
<td>1</td>
<td>97224</td>
<td>1</td>
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<tr>
<td>93505</td>
<td>1</td>
<td>85736</td>
<td>1</td>
</tr>
<tr>
<td>92234</td>
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<td>95307</td>
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<td>93215</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>93702</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>93240</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>234</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Safe Camping - Client Demographic Information

<table>
<thead>
<tr>
<th>Race Demographic</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>3</td>
</tr>
<tr>
<td>25 - 34</td>
<td>16</td>
</tr>
<tr>
<td>35 - 44</td>
<td>17</td>
</tr>
<tr>
<td>45 - 54</td>
<td>18</td>
</tr>
<tr>
<td>55 - 61</td>
<td>4</td>
</tr>
<tr>
<td>62+</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>61</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Race Demographic</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Indian or Alaska Native</td>
<td>1</td>
</tr>
<tr>
<td>Asian</td>
<td>1</td>
</tr>
<tr>
<td>Black or African American</td>
<td>6</td>
</tr>
<tr>
<td>Native Hawaiian or Other Pacific Islander</td>
<td>1</td>
</tr>
<tr>
<td>White</td>
<td>51</td>
</tr>
<tr>
<td>Multiple races</td>
<td>1</td>
</tr>
<tr>
<td>Client Don't know / Refused</td>
<td></td>
</tr>
<tr>
<td>No Answer</td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>61</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>26</td>
</tr>
<tr>
<td>Male</td>
<td>34</td>
</tr>
<tr>
<td>Trans Female (MTF or Male to Female)</td>
<td></td>
</tr>
<tr>
<td>Trans Male (FTM or Female to Male)</td>
<td></td>
</tr>
<tr>
<td>Gender Non-Conforming (i.e. not exclusively male or female)</td>
<td>1</td>
</tr>
<tr>
<td>Client doesn't know</td>
<td></td>
</tr>
<tr>
<td>Client refused</td>
<td></td>
</tr>
<tr>
<td>No Answer</td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>61</strong></td>
</tr>
</tbody>
</table>

### Program Highlights

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>93301</td>
<td>5</td>
</tr>
<tr>
<td>93304</td>
<td>2</td>
</tr>
<tr>
<td>93305</td>
<td>11</td>
</tr>
<tr>
<td>93306</td>
<td>3</td>
</tr>
<tr>
<td>93307</td>
<td>5</td>
</tr>
<tr>
<td>93308</td>
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</tr>
<tr>
<td>93309</td>
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<td>93238</td>
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<td>93252</td>
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<tr>
<td>58801</td>
<td>1</td>
</tr>
<tr>
<td>75014</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Not specified</th>
<th>13</th>
</tr>
</thead>
</table>

**Total:** 61
# Community Action Partnership of Kern
## Monthly Report 2023

<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Work Unit</th>
<th>California Advancing and Innovating Medi-Cal (CalAIM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Division/Director</th>
<th>Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebecca Moreno</td>
<td>January to December 2023</td>
</tr>
<tr>
<td>Director of Community Services</td>
<td></td>
</tr>
<tr>
<td>Program Manager</td>
<td>Joseph Aguilar</td>
</tr>
</tbody>
</table>

## Program Description

CalAIM is a new initiative by the Department of Health Care Services (DHCS) to improve the quality of life and health outcomes of Medi-Cal beneficiaries by implementing broad delivery of system, programmatic, and payment system reforms. A key feature of CalAIM is the introduction of a new menu of “in lieu of services” (ILOS), or Community Supports, which, at the option of a MediCal managed care health plan (MCP) and a Member, can substitute for covered Medi-Cal services as cost-effective alternatives. MCPs will be responsible for administering Community Supports. For this partnership, CAPK would serve as a Community Support providing rental assistance.

## Housing Transition Navigation Services

<table>
<thead>
<tr>
<th>Housing Navigator to client ratio 1:75</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>220</td>
<td>220</td>
<td>300</td>
<td>880%</td>
<td>73%</td>
</tr>
</tbody>
</table>

## Housing Deposits

<table>
<thead>
<tr>
<th>One time use up to $5000 per client</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>2</td>
<td>25</td>
<td>96%</td>
<td>8%</td>
</tr>
</tbody>
</table>

## Housing Tenancy and Sustaining Services

<table>
<thead>
<tr>
<th>Housing Navigator to client ratio 1:75</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11</td>
<td>11</td>
<td>150</td>
<td>88%</td>
<td>7%</td>
</tr>
</tbody>
</table>

## Explanation (Over/Under Goal Progress)

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milestone 1: 2 FTE HN to establish caseload (1:35) by 3/31/23</td>
<td>1 FTE has established 35 client caseload, 1 FTE has begun to receive new incoming referrals to establish caseload.</td>
</tr>
<tr>
<td>Milestone 2: 2 FTE HN to establish caseload (1:35) by 6/30/2023</td>
<td>2 new navigators were onboarded this month, training schedule will be approx. 6 weeks</td>
</tr>
<tr>
<td>Milestone 3: 4 FTE HN to increase to full capacity (1:75) by 7/31/2023</td>
<td>TBD</td>
</tr>
</tbody>
</table>

## Program Highlights
Health and Nutrition Services

Cal-Fresh Health Living Program
Food Bank
Migrant Childcare Alternative Payment
Women, Infant, and Children
### Program Description

The CalFresh Healthy Living (CFHL) program, Funded by the USDA and administered by CDSS, improves the nutritional health of low-income Kern County residents by providing access to nutrition education, physical activity education, and leadership within community collaboratives that focus on health and nutrition. The program does this by providing Direct Education classes, Indirect Education materials and resources, and Policy Systems and Environmental Changes (PSE’s). CFHL has 3 subcontractors that assist in carrying out the goal of educating the student population.

### Supplemental Nutrition Assistance Program-Education (SNAP-Ed) eligible participants, receiving Nutrition Education 10/1/2022-9/30/2023 (FNPI 5a) (SRV 5f).

<table>
<thead>
<tr>
<th>Program/Work Unit</th>
<th>Month</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Action Partnership of Kern (CAPK) Direct Education provided.</td>
<td>179</td>
<td>279</td>
<td>2,000</td>
<td>27%</td>
<td>14%</td>
</tr>
<tr>
<td>Kern County Superintendent of Schools (KCSOS) Subcontractor Direct Education provided.</td>
<td>520</td>
<td>2,370</td>
<td>2,000</td>
<td>78%</td>
<td>119%</td>
</tr>
<tr>
<td>Kernville Unified School District (KUSD) Subcontractor Direct Education provided.</td>
<td>257</td>
<td>705</td>
<td>1,000</td>
<td>77%</td>
<td>71%</td>
</tr>
<tr>
<td>Lamont Elementary School District (LESD) Subcontractor Direct Education provided.</td>
<td>21</td>
<td>853</td>
<td>1,000</td>
<td>6%</td>
<td>85%</td>
</tr>
<tr>
<td>Complete the Healthy Food Pantry Assessment Toolkit (HFPAT) to identify potential growth opportunities for 6 different food pantries.</td>
<td>0</td>
<td>2</td>
<td>6</td>
<td>0%</td>
<td>33%</td>
</tr>
<tr>
<td>Cumulative Indirect Education: Indirect education, for SNAP-Ed purposes, is defined as the distribution or display of information and resources which involve no participant interaction with an instructor or multimedia.</td>
<td>2,855</td>
<td>9,988</td>
<td>30,000</td>
<td>29%</td>
<td>33%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)

In May 2023 CFHL Staff were successful in increasing the amount of Direct Education for the month. This year there was a slight decrease in Direct Education due to the State asking program to focus on more Policy, System, and Environmental changes which move along at a slower pace. an HFPAT was rescheduled from May to June for CSUB’s Food Pantry and Indirect education increased steadily as well.

### Program Strategic Goals

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimize staff turn-over and become fully staffed.</td>
<td>Currently CFHL is at 80% capacity. The CFHL team is currently running 2 Health Educator positions. Interviews will be held in June.</td>
</tr>
<tr>
<td>Creative a new Food Pantry Collaborative in Kern County where Pantries can collaborate, plan, and discuss ideas to improve services and strategically plan for encouraging Nutrition based decisions for clients.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
</tr>
<tr>
<td>In May 2023, CFHL continued Direct Education classes with Owen's Valley and started classes with Taft College, Greenfield Resource Center, and Rio Mirada Emergency Housing. CFHL also presented at Sterling HS center and for the CAPK Central Kitchen. CFHL attended events at the Cal City Farmer's Market, Shafter Resource Fair, F St. Farmers Market, East Bakersfield Festival, and Wasco Mental Health Awareness Month Event.</td>
<td></td>
</tr>
<tr>
<td>Partner with community agencies and collaboratives that are SNAP-Ed approved, including other CAPK Programs, to increase the amount of Direct Education, Indirect Education, and PSE’s which improve the opportunities for the SNAP-Ed eligible population to have healthy food choices, physical activity, and nutrition information.</td>
<td></td>
</tr>
<tr>
<td>The CSUB Food Pantry will be conducting their HFPAT in June 2023. Originally the HFPAT was going to be conducted in May 2023 but CSUB had to reschedule. They are excited to identify what areas to strengthen.</td>
<td></td>
</tr>
<tr>
<td>Progress with assessing Food Pantries and the progress in partnering in implementing improvement measures based on the data of the Healthy Food Pantry Assessment Toolkit (HFPAT).</td>
<td></td>
</tr>
<tr>
<td>Kern County Food Pantry Collaborative (KCFPC) held its second meeting on April 10, 2023 with a total of 18 participants. The collaborative focused on Mission &amp; Goal Strategy, featured presentation on Food Recovery, Recent Pantry Partner Connections as a result of the first KCFPC, Current NPP progress, Agency Partner Conference update and the benefits of NPP client-choice model, Grant Opportunities and Resources. The following Meeting will be held in August/September 2023 and a CAPK Food Bank Representative will join the collaborative to answer any question the pantries my have.</td>
<td></td>
</tr>
</tbody>
</table>

### Program Highlights

The CFHL team had California Department of Public Health (CDPH) Visit on 5/30/2023 to discuss program progress and conduct observations on program activities. The visit was a success and the State representatives gave the CAPK CFHL Team praise on implementing the program. The visit ended with an observation of a Direct Education class at the Rio Mirada. State staff commended the CFHL Health Educator’s Deveney and Diana for implementing an interactive and productive class. The visit report will be coming into the CFHL team sometime mid-June.
The Food Bank provides food assistance to low-income families and individuals through a network of more than 150 agency partner distribution sites across Kern County.
Community Action Partnership of Kern  
Monthly Report 2023

<table>
<thead>
<tr>
<th>Explanation (Over/Under Goal Progress)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total pounds distributed in May declined due to the transition to the online ordering system. Agency partners are ordering less of the donated items and more of the bulk CalFood procured items. During phase 3 of construction in June, staff is considering testing a hybrid model where agencies order bulk items online, but are able to shop in person for the sorted donated items. Also, Brighter Bites served half of the previous month's total due to the school year coming to an end. Only half of the schools have a summer program. Lastly, our CSFP senior box program exceeded their caseload passing the 5,000 individuals served threshold.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2023 Program Strategic Goals</th>
<th>Progress Towards 2023 Strategic Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultivate strong relationships with organizations working on food insecurity including the food policy council.</td>
<td>CAPK is engaging with community organizations in a meeting on June 29th</td>
</tr>
<tr>
<td>Re-configure the pantry program from on-site shopping to online ordering.</td>
<td>Online model is fully operational. Hired a staff member to oversee the pantry program. Making modifications to continue online ordering for bulk items while giving agencies additional in person on demand access.</td>
</tr>
<tr>
<td>Create additional access points in the county by adding new pantries as well as providing night and weekend pantry access.</td>
<td>We added 2 pantries this month. Our total pantry partner count is: 129.</td>
</tr>
<tr>
<td>Develop a classification system for measuring, tracking and increasing the nutrition level of the food distributed.</td>
<td>Classification of food in nutritional categories will begin in Q4 after the completion of the expansion project.</td>
</tr>
<tr>
<td>Develop a direct to client home delivery program for emergency food assistance.</td>
<td>Development of this program is set to begin in Q4 after the completion of the expansion project.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>The month of May was a month of transitions. We were able to fully transition our pantry program to online shopping. In conjunction with that transition, we reassigned a staff member who previously was an Admin Clerk, to become the first ever Pantry Specialist. This month, Food Bank Administrator Kelly Lowery visited the LA Regional Food Bank and it's CEO Michael Flood as well as the Orange County Food Bank and it's CEO, Mark Lowry. During these visits, we were inspired to further utilize available technology to enhance our agency relations, reporting and consider a hybrid model for the pantry program. Also in May, we hosted a tour with CSD Director David Scribner. Lastly, in May we celebrated the 10 year work anniversary of our Warehouse Specialist George Alexander.</td>
</tr>
</tbody>
</table>
**Month** | May-23
---|---
**Program/Work Unit** | Migrant Childcare Alternative Payment (MCAP)
**Division/Director** | Susana Magana
**Program Administrator** | Laura Porta
**Reporting Period** | January 01, 2023 to December 31, 2023

### Program Description

The Migrant Childcare Alternative Payment (MCAP) program provides childcare subsidy to migrant, agriculturally working families. Families can apply for child care services in six entry counties: Kern, Kings, Madera, Merced, Tulare, and Fresno. Once a family is enrolled in the program, the family can migrate anywhere in California to follow agricultural work and their childcare services can continue.

<table>
<thead>
<tr>
<th>Services</th>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Child Enrollments</td>
<td>252</td>
<td>1,197</td>
<td>500</td>
<td>605%</td>
<td>239%</td>
</tr>
<tr>
<td>Childcare Providers (SRV 7f)</td>
<td>29</td>
<td>111</td>
<td>120</td>
<td>290%</td>
<td>93%</td>
</tr>
</tbody>
</table>

**MCAP Subsidies (SRV 7e)***

<table>
<thead>
<tr>
<th>Provider Payments-Subsidies Expended</th>
<th>Month of April processed in May</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,091,284</td>
<td>$8,833,858</td>
<td>$14,000,000</td>
<td>179%</td>
<td>63%</td>
<td></td>
</tr>
</tbody>
</table>

### MCAP FY 2022 / 2023 Progress

<table>
<thead>
<tr>
<th>Services</th>
<th>Current Month</th>
<th>FYTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child Enrollments</td>
<td>252</td>
<td>2690</td>
<td>2300</td>
<td>10.96%</td>
<td>116.96%</td>
</tr>
<tr>
<td>Provider Payments-Subsidies Expended</td>
<td>$2,091,284</td>
<td>$14,479,608</td>
<td>$21,500,000</td>
<td>117%</td>
<td>67%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)

The Migrant Childcare Alternative Payment Program continues to make significant progress in reaching the target enrollment goals in family enrollments and childcare provider reimbursements. Management has implemented different outreach strategies for reaching the target enrollment populations and increasing the participation of childcare providers in our program. This ensures that families have a choice for services in their immediate community. Further, in the last few months our program implemented an on the spot enrollment process which helped the program have increased enrollments, monthly, and increase program participant satisfaction, which was reflected in our Program Self Evaluation (PSE) survey.

### Program Strategic Goals

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fill Staff Vacancies.</td>
<td>MCAP management has completed a full training course for our most recent hired staff members. We will begin recruiting for an outreach technician position to be filled early in the month of July 2023.</td>
</tr>
<tr>
<td>2. Staff Retention and Training</td>
<td>Program management is continuing with the revision of our program training manual and conducting monthly staff development trainings to enhance work effectiveness, productivity and work place satisfaction.</td>
</tr>
</tbody>
</table>
### 3. Contingency Staffing Plan & Solidify Program Growth.

<table>
<thead>
<tr>
<th>Program Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>All program personnel is fully dedicated to reaching our enrollment goals and fully earning our contract. New management team members are now fully functioning in their positions and contributing to reaching the goal of our program.</td>
</tr>
</tbody>
</table>

May was a very successful month for MCAP! During the month of May 2023, Susana Bailon, and Evelyn Ramirez from our management team graduated from CAPK’s /BC leadership program. We were able to reach the $2.09 million dollars processed in childcare reimbursements for services used during April 2023. This is the higher reimbursement totals, reached for a single month, for the history of the MCAP Program. MCAP was also able to break the program record in child enrollments, currently a total of 2690 children are actively receiving services from MCAP. This is also the highest enrollment total in the history of our program.
## Program Description

The Women Infants & Children (WIC) program provides education, breastfeeding support and food vouchers for families with infants, children up to age 5, and women who are pregnant, postpartum or breast feeding. CAPK WIC operates in 21 sites throughout Kern County, 5 locations in San Bernardino County, and through one mobile WIC clinic to reach hard-to-serve populations.

### Services

<table>
<thead>
<tr>
<th>Services</th>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caseload (SRV 5g)</td>
<td>13,946</td>
<td></td>
<td>14,610</td>
<td>95%</td>
<td></td>
</tr>
<tr>
<td>Local Vendor Liaison-Contact Stores</td>
<td>9</td>
<td>135</td>
<td>268</td>
<td>40%</td>
<td>50%</td>
</tr>
<tr>
<td>Breast Feeding 30% of infants are breastfed (i.e., some, mostly or fully breastfeeding compared to formula)</td>
<td>1,019</td>
<td></td>
<td>900</td>
<td>113%</td>
<td></td>
</tr>
</tbody>
</table>

### Outreach

<table>
<thead>
<tr>
<th>Outreach</th>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Enrollment</td>
<td>173</td>
<td>902</td>
<td>1,500</td>
<td>138%</td>
<td>60%</td>
</tr>
<tr>
<td>WIC Presentations and Outreach Events</td>
<td>9</td>
<td>44</td>
<td>72</td>
<td>150%</td>
<td>61%</td>
</tr>
<tr>
<td>Publication in newspaper, television, and/or social media postings (English and Spanish)</td>
<td>23</td>
<td>120</td>
<td>260</td>
<td>106%</td>
<td>46%</td>
</tr>
</tbody>
</table>

### Regional Breast Liaison (RBL)

Meet with key community stakeholders (i.e., medical managed care, hospital staff, lactation support, health care providers, other WIC agencies) in Region 24 to increase breastfeeding awareness and referrals to the WIC program, as well as share WIC digital materials and utilization.

<table>
<thead>
<tr>
<th>RBL</th>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10</td>
<td>50</td>
<td>120</td>
<td>100%</td>
<td>42%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)

Caseload remained at same level as April. Our LVL visited about 40% of the assigned stores, completing visits to those in the more rural areas. The LVL Triannual assignment 2 from Feb1-May31, 2023 was completed. Triannual assignment 3 training for LVL began this week and assignment 3 will span June 1-Sept 30, 2023.

Outreach events has increase since covid restrictions went away so we need to re-visit our projections for these events as well as on-line enrollments as both are exceeding our projected numbers.
| Develop strategies to increase WIC retention and re-engagement with current participants | We continue to work on re-engagement with current participants. This month it has been difficult due to staff shortages. |

Program Highlights
Youth and Community Services

East Kern Family Resource Center
Oasis Family Resource Center
Energy, Weatherization, and Utility Assistance
Friendship House Community Center
Shafter Youth Center
Volunteer Income Tax Assistance
### Program Description

East Kern Family Resource Center (EKFRC) is a regional resource center based in Mojave, CA. The EKFRC assists individuals and families from the desert and Tehachapi Mountain communities. The primary focus is on referred families with children who are at risk of abuse and neglect, and families unprepared to enter kindergarten successfully. The EKFRC also assists walk-in clients with basic needs, clothing, faxing/copying services, HEAP applications and referrals.

### Differential Response

<table>
<thead>
<tr>
<th>Differential Response</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR Referrals - Received from DHS</td>
<td>34</td>
<td>142</td>
<td>125</td>
<td>82%</td>
<td>114%</td>
</tr>
<tr>
<td>Case Management-Families (SRV 7a)</td>
<td>7</td>
<td>23</td>
<td>50</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>Case Management-Children (SRV 7a)</td>
<td>31</td>
<td>79</td>
<td>125</td>
<td>74%</td>
<td>63%</td>
</tr>
<tr>
<td><strong>Differential Response Total</strong></td>
<td>72</td>
<td>244</td>
<td>300</td>
<td>72%</td>
<td>81%</td>
</tr>
</tbody>
</table>

### First 5

<table>
<thead>
<tr>
<th>First 5</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parents Receiving Case Management Services (SRV 7a)</td>
<td>0</td>
<td>7</td>
<td>30</td>
<td>0%</td>
<td>23%</td>
</tr>
<tr>
<td>Children Receiving Case Management Services (SRV 7a)</td>
<td>0</td>
<td>9</td>
<td>30</td>
<td>0%</td>
<td>30%</td>
</tr>
<tr>
<td>Parents Participating in Court Mandated Classes (FNPI 5d &amp; SRV 5mm)</td>
<td>0</td>
<td>4</td>
<td>10</td>
<td>0%</td>
<td>40%</td>
</tr>
<tr>
<td>Children Educational Center Base Activities (FNPI 2b)</td>
<td>0</td>
<td>3</td>
<td>30</td>
<td>0%</td>
<td>10%</td>
</tr>
<tr>
<td>Children Educational Home Base Activities (FNPI 2b)</td>
<td>0</td>
<td>8</td>
<td>30</td>
<td>0%</td>
<td>27%</td>
</tr>
<tr>
<td>Children Summer Bridge Activities (FNPI 2b)</td>
<td>1</td>
<td>1</td>
<td>15</td>
<td>20%</td>
<td>7%</td>
</tr>
<tr>
<td>Family Support Services for non-clients with children 5 and under</td>
<td>40</td>
<td>116</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collaborative Meetings Participated</td>
<td>1</td>
<td>5</td>
<td>12</td>
<td>25%</td>
<td>42%</td>
</tr>
<tr>
<td><strong>First 5 Total</strong></td>
<td>42</td>
<td>153</td>
<td>157</td>
<td>6%</td>
<td>97%</td>
</tr>
</tbody>
</table>

### Walk-In Community Services (Duplicated Clients & Case)

<table>
<thead>
<tr>
<th>Walk-In Community Services</th>
<th>Month</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Assistance</td>
<td>140</td>
<td>596</td>
</tr>
</tbody>
</table>
Program Highlights

EKFRC was awarded 2 Grants in the month of May. We were awarded the Homeless Housing Assistance and Prevention Grant for $300,000 and the Kern Family Health Care Community Grant in the amount of $4000. We are very excited to begin our new program for homeless beginning July 1, 2023.

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Find additional funding.</td>
<td>We are working on a Stater Bros grant for Healthy living.</td>
</tr>
<tr>
<td>2. Participate in community events.</td>
<td>We participated in the Mental Health Awareness Resource Fair with College Community Services on May 24, 2023.</td>
</tr>
<tr>
<td>3. Expand our reach across the East Kern Communities.</td>
<td>We are rounding up for our Summer Bridge Program across East Kern Enrollment has begun for both sessions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Explanation (Over/Under Goal Progress)</th>
</tr>
</thead>
</table>
In the month of May all except for one goal has been met in First 5. Our Summer Bridge program will begin on June 15. Parents have showed interest in the upcoming session by picking up applications at the center.
The Oasis Family Resource Center provides resources, education, and crisis assistance to individuals, families, and children in Ridgecrest and surrounding communities. They focus on providing case management and educational support to families to build resilience.

<table>
<thead>
<tr>
<th>First 5 Kern (Unduplicated Services)</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal (12 Mo)</th>
<th>Month Progress</th>
<th>Annual Progress (12 Mo)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parents Receiving Case Management Services (SRV 7a)</td>
<td>2</td>
<td>9</td>
<td>30</td>
<td>80%</td>
<td>30%</td>
</tr>
<tr>
<td>Children Receiving Case Management Services (SRV 7a)</td>
<td>1</td>
<td>9</td>
<td>30</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Parents Participating in Court Mandated Classes (FNPI 5d &amp; SRV 5mm)</td>
<td>0</td>
<td>7</td>
<td>10</td>
<td>0%</td>
<td>70%</td>
</tr>
<tr>
<td>Children Educational Home Base Activities (FNPI 2b)</td>
<td>1</td>
<td>7</td>
<td>15</td>
<td>80%</td>
<td>47%</td>
</tr>
<tr>
<td>Children Summer Bridge Activities (FNPI 2b)</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Family Support Services for non-clients with children 5 and under</td>
<td>20</td>
<td>78</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>First 5 Total</strong></td>
<td><strong>24</strong></td>
<td><strong>110</strong></td>
<td><strong>95</strong></td>
<td><strong>76%</strong></td>
<td><strong>116%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Walk-In Community Services (Duplicated &amp; Non First 5 Kern Clients)</th>
<th>Month</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food/Household Items (SRV 7c )</td>
<td>76</td>
<td>391</td>
</tr>
<tr>
<td>Household Items (SRV 7c )</td>
<td>81</td>
<td>487</td>
</tr>
<tr>
<td>Baby Supplies</td>
<td>87</td>
<td>340</td>
</tr>
<tr>
<td>Referrals/Administrative Services (SRV 7c)</td>
<td>69</td>
<td>305</td>
</tr>
<tr>
<td>Court Mandated Correspondence</td>
<td>3</td>
<td>34</td>
</tr>
<tr>
<td>Emergency Clothing (SRV 7n)</td>
<td>11</td>
<td>77</td>
</tr>
<tr>
<td>Copies</td>
<td>23</td>
<td>85</td>
</tr>
<tr>
<td>Educational Supplies</td>
<td>10</td>
<td>55</td>
</tr>
<tr>
<td>Transportation Assistance (SRV 7d )</td>
<td>20</td>
<td>87</td>
</tr>
<tr>
<td>COVID-19 Supplies (SRV 5oo)</td>
<td>1</td>
<td>63</td>
</tr>
<tr>
<td><strong>Total Community Services</strong></td>
<td><strong>381</strong></td>
<td><strong>1924</strong></td>
</tr>
</tbody>
</table>

**Explanation (Over/Under Goal Progress)**

The First 5 Kern numbers may appear to be low in May but the Oasis FRC has already met or exceeded all the F5K fiscal year 2022-2023 goals as reporting is from July 2022 to June 2023.

**Program Strategic Goals**

<table>
<thead>
<tr>
<th>1. Offer Court Mandated Nurturing Parenting Class every other quarter.</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The class will be offered again in the fall.</td>
</tr>
</tbody>
</table>
### Program Highlights

The Oasis Family Resource Center provided services to a total of 191 families in May. The FRC is planning its June Summer Bridge program and registration is almost at full capacity. The Oasis purchased a Ford Explorer using funding received from Wells Farge and Kern Health Systems.

<table>
<thead>
<tr>
<th>2. Apply for three funding opportunities that would help extend range of services outside First 5 clients for under served families (Parenting, Children 6-18, seniors, and homeless individuals).</th>
<th>The Oasis Family Resource Center participated in the Give Big Kern Campaign this month.</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Participate in community outreach activities to promote CAPK &amp; Oasis FRC services and seek donations from local business partners (in-kind and monetary).</td>
<td>Eric the supervisor of the Oasis FRC was elected as a board member of the Ridgecrest Chamber of Commerce this month for a 3-year term. This will help the Oasis FRC to continue building relationships with local businesses and community members.</td>
</tr>
</tbody>
</table>
## Program Description

The Energy Program assists income-eligible Kern County residents with utility bill payment, free weatherization, and energy education at no cost to the participant. Weatherization services include weather stripping; repair or replacement of windows and doors, heating/cooling appliances, stoves, refrigerators, and more.

### Energy & Utility Assistance

<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Work Unit</th>
<th>Energy &amp; Utility Assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-23</td>
<td>Fred Hernandez</td>
<td>Wilfredo Cruz Jr.</td>
</tr>
</tbody>
</table>

**January 1, 2023 - December 31, 2023**

### Program/Work Unit

- **Energy & Utility Assistance**

### Low-income Home Energy Program (LIHEAP) 2022

<table>
<thead>
<tr>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households Served - Utilities Assistance</td>
<td>0</td>
<td>42</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Utility Payments</td>
<td>$</td>
<td>63,947</td>
<td>$</td>
<td>0%</td>
</tr>
<tr>
<td>Households Served - Weatherization</td>
<td>0</td>
<td>64</td>
<td>64</td>
<td>0%</td>
</tr>
</tbody>
</table>

### American Rescue Plan Act (ARPA) 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households Served - Utilities Assistance</td>
<td>480</td>
<td>2,453</td>
<td>2,000</td>
<td>72%</td>
</tr>
<tr>
<td>Utility Payments</td>
<td>$</td>
<td>702,075</td>
<td>$</td>
<td>2,793,309</td>
</tr>
</tbody>
</table>

### Low-Income Household Water Assistance Program (LIHWAP) 2021

<table>
<thead>
<tr>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households Served - Utilities Assistance</td>
<td>118</td>
<td>480</td>
<td>2,000</td>
<td>18%</td>
</tr>
<tr>
<td>Utility Payments</td>
<td>$</td>
<td>91,858.77</td>
<td>$</td>
<td>340,118.67</td>
</tr>
</tbody>
</table>

### Low-income Home Energy Program (LIHEAP) 2023

<table>
<thead>
<tr>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households Served - Utilities Assistance</td>
<td>251</td>
<td>1,098</td>
<td>1,900</td>
<td>45%</td>
</tr>
<tr>
<td>Utility Payments</td>
<td>$</td>
<td>391,546</td>
<td>$</td>
<td>1,446,536.52</td>
</tr>
</tbody>
</table>

### Emergency Supplemental Low-income Home Energy Program (ESLIHEAP) 2023

<table>
<thead>
<tr>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households Served - Utilities Assistance</td>
<td>22</td>
<td>22</td>
<td>175</td>
<td>38%</td>
</tr>
<tr>
<td>Utility Payments</td>
<td>$</td>
<td>40,464.54</td>
<td>$</td>
<td>40,464.54</td>
</tr>
<tr>
<td>Households Served - Weatherization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Totals

<table>
<thead>
<tr>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households Served - Utility Assistance (FNPI 4z, SRV 4i, SRV 7b)</td>
<td>905</td>
<td>4,095</td>
<td>5,900</td>
<td>46%</td>
</tr>
<tr>
<td>Total Utility Payments</td>
<td>$</td>
<td>1,225,944</td>
<td>$</td>
<td>4,684,375.99</td>
</tr>
<tr>
<td>Households Weatherized (FNPI 4h, FNPI 4z, SRV 4q, SRV 7b, &amp; SRV 4t)</td>
<td>21</td>
<td>85</td>
<td>170</td>
<td>37%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)

The new ESLIHEAP is a first-time contract for our agency. At this time, we are currently focused on expending 2021 ARPA and then 2023 LIHEAP as soon as possible. The ESLIHEAP contract allows us to assist clients who have already received services from the two aforementioned contracts. We are not, currently, able to establish a monetary goal for this contract - but instead will focus on assisting at least 25 clients a month under this contract.

### Progress Towards Goal

1. Fully implementing online client self-application for Utility Assistance
   - Currently in process of testing self-application system in Eastern Kern
2. Become fully staffed and trained in Weatherization and Utility Assistance
   - Wx - 90% staffers, 85% trained
   - UA - Fully staffed, 65% trained (influx of temp employees)
<table>
<thead>
<tr>
<th>3) Fully expend 2022 LIHEAP and 2021 ARPA contracts by end of contract dates</th>
<th>2022 LIHEAP almost fully expended, 2021 ARPA in process</th>
</tr>
</thead>
</table>

**Program Highlights**

1) Record month for Weatherization in work submitted to CSD for reimbursement  
2) First-ever outreach event completed in partnership with Cal Water  
3) LIHWAP marketing campaigns has begun - radio, tv, newspapers, mail drops, cuadrillas
Located in Southeast Bakersfield, the program serves children, adults, and families through after-school, summer and mentor programs, nutrition education, sports, access to social services, and more.

### Youth Programs

<table>
<thead>
<tr>
<th>Youth Programs</th>
<th>Current Enrolled</th>
<th>Month (Added)</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youth Mentoring (FNPI 2c.2., FNPI 2c.3, SRV 2p) Reporting ends June 30, 2023</td>
<td>42</td>
<td>0</td>
<td>42</td>
<td>100</td>
<td>0%</td>
<td>42%</td>
</tr>
<tr>
<td><strong>Summer Program</strong> (Max Capacity due to COVID) (SRV 2m)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>25</td>
<td>25</td>
<td>25</td>
<td>35</td>
<td>0%</td>
<td>71%</td>
</tr>
<tr>
<td>After School/Learning Pods Enroll (FNPI 2c.2., FNPI 2c.3, SRV 2p)</td>
<td>N/A</td>
<td>5</td>
<td>16</td>
<td>50</td>
<td>120%</td>
<td>32%</td>
</tr>
</tbody>
</table>

### Medi-Cal Outreach

<table>
<thead>
<tr>
<th>Social media emails and impressions</th>
<th>Month (Added)</th>
<th>YTD</th>
<th>YTD Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2680778</td>
<td>7,711,944</td>
<td>7,000,000</td>
<td>460%</td>
<td>110%</td>
</tr>
<tr>
<td>Canvassing phone calls and flyers</td>
<td>1195</td>
<td>5,938</td>
<td>10,000</td>
<td>143%</td>
<td>59%</td>
</tr>
</tbody>
</table>

### Explanation (Over/Under Goal Progress)

Youth participants are not currently enrolled in the afterschool program because the summer program is being offered at this time. The Medi-Cal outreach campaign continues, which includes additional billboard and GET Bus advertisements. In addition, 211 staff will start providing in-person Medi-Cal application/renewal assistance at the Friendship House on Tuesdays and Thursdays beginning July 6, 2023.

### Program Strategic Goals

- **Plan and facilitate Friendship House (FHCC) Advisory Board fundraising event to benefit the Friendship House.**
  - The Passport to Success fundraising event for the Friendship House is scheduled for October 5, 2023. Sponsorship opportunities are available.

- **Recruit and secure staffing for the Friendship House.**
  - The Friendship House is currently recruiting for one Program Educator for the Health Navigator Medi-Cal Program.

- **Work with the CAPK Executive Team to increase the number of grants researched/submitted for the CAPK Friendship House.**
  - The Friendship House received a grant award from Kern Health Systems to provide a STEM program to community youth during the summer.

### Program Highlights

The Bakersfield Police Department will be hosting a meet and greet event at the Friendship House on Wednesday, June 28th from 5pm-8:30pm. The event will offer free food, games, and an opportunity for families in the community to meet the BPD Officers that patrol the zone for southeast Bakersfield.
The Shafter Youth Center (SYC) serves children, adults, and families through youth after-school, summer and pre-employment programs, parenting classes, nutrition education, sports, access to social services, and more.

### Youth Programs

<table>
<thead>
<tr>
<th>Current Enrolled (duplicated)</th>
<th>Month (unduplicated)</th>
<th>YTD (unduplicated)</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Program starting in June (Max Capacity due to COVID) (SRV 2m) June/July</td>
<td>NA</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>After School Program Enroll (FNPI 2c &amp; SRV 2l) (hours of operation: 2-5pm; 1230p - 5pm for minimum day)</td>
<td>22</td>
<td>1</td>
<td>25</td>
<td>35</td>
<td>34%</td>
</tr>
</tbody>
</table>

### Community Programs

**Dignity Health Mental Health Project, Youth Basketball, Energy Program (Utility Assistance), Fitness Boot Camp and Girl Scouts**

8 groups

### Outreach Activities

<table>
<thead>
<tr>
<th>Outreach Events (presentations/informational updates)</th>
<th>Month</th>
<th>YTD</th>
<th>Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>8</td>
<td>6</td>
<td>400%</td>
<td>133%</td>
</tr>
<tr>
<td>Community Events (i.e., diaper, food, PPE distributions)</td>
<td>1</td>
<td>3</td>
<td>6</td>
<td>200%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Dignity Health Mental Health (Spanish) meets 1x per month in person; Adult basketball 4 per week; Energy Program hosts appointments 1x per month; Fitness Boot Camp meets 2x per week; Girl Scouts meet 2x per month; Service Clubs/Chamber of Commerce used for meetings this month. Citizenship classes, 2 students currently being served.

### Program Strategic Goals

<table>
<thead>
<tr>
<th>Goal</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increase youth program registration as COVID restrictions ease up while maintaining a safe environment.</td>
<td>Enrollment is increasing with the upcoming Summer program. Numbers will be reflected in June report</td>
</tr>
<tr>
<td>2. Increase attainment of program funding to provide larger variety of program offerings.</td>
<td>Grant and funding opportunities have been applied for. Some have not been successful. Although, there has been success in securing funding for the playground project</td>
</tr>
</tbody>
</table>
3. Increase community engagement, including volunteers, social media, program participation. | Community engagement increased with hosting the CAPK Resource Fair.

<table>
<thead>
<tr>
<th>Program Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shafter Youth Center was the host for this year's Community Action Resource Fair, in honor of Community Action Month.</td>
</tr>
</tbody>
</table>
Community Action Partnership of Kern  
Monthly Report 2023

<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Work Unit</th>
<th>Volunteer Income Tax Assistance (VITA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Division/Director: Fred Hernandez  
Program Manager: Jacqueline Guerra  
Reporting Period: January 1, 2023 - December 31, 2023

**Program Description**

VITA offers no-cost tax preparation and e-filing for low and moderate-income individuals and families. VITA also assists eligible clients to take advantage of the Earned Income Tax Credit (EITC), increasing their tax return and boosting the local economy. All VITA services are provided by IRS-certified staff and volunteers.

<table>
<thead>
<tr>
<th>Completed Tax Returns (SRV 3o) 10/01/2022 to 09/30/2023</th>
<th>Month</th>
<th>YTD</th>
<th>Goal Adjusted</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>185</td>
<td>4,628</td>
<td>6,000</td>
<td>37%</td>
<td>77%</td>
</tr>
<tr>
<td>State</td>
<td>191</td>
<td>4,600</td>
<td>6,000</td>
<td>38%</td>
<td>77%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Refunds and Credits (SRV 3o) 10/01/2022 to 09/30/2023</th>
<th>Month</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Refunds</td>
<td>$138,987</td>
<td>$3,219,970</td>
</tr>
<tr>
<td>State Refunds</td>
<td>$30,641</td>
<td>$1,098,291</td>
</tr>
<tr>
<td>Federal EITC (income limit $57,414/household)</td>
<td>$72,425</td>
<td>$2,015,152</td>
</tr>
<tr>
<td>CalEITC (income limit $30,000/household)</td>
<td>$16,893</td>
<td>$452,314</td>
</tr>
</tbody>
</table>

**Total Refunds and Credits**

10/01/2022 to 09/30/2023

- Federal: $258,946
- State: $6,785,727

**Individual Taxpayer Identification Number (ITIN) (SRV 3o)**

10/01/2022 to 09/30/2023

<table>
<thead>
<tr>
<th>Applications (New/Renewal)</th>
<th>Month</th>
<th>YTD</th>
<th>Goal Adjusted</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>146</td>
<td>150</td>
<td>140%</td>
<td>97%</td>
<td></td>
</tr>
</tbody>
</table>

**Explanation (Over/Under Goal Progress)**

Tax return count between federal and state can differ for several reasons. The most common is filing for specific eligible credits/stimulus.

**Program Strategic Goals**

- Continue to build relationships in rural communities in order to reach more clients
- Sites were extended until June in the following areas: McFarland, Wasco, Taft, Ridgecrest and Mojave.

**Program Highlights**

During the month of May we had several new clients thanks to our partnership with the local IRS office. The local IRS office identifies taxpayers who are low-medium income and refers them to the CAPK VITA assist with any tax return corrections, audit responses and catching up on tax years 2017 to date.
Operations

Data Services
Facilities & Maintenance
Information Technology
Risk Management
<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Work Unit</th>
<th>Operations Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-23</td>
<td>Emilio Wagner</td>
<td>Douglas Dill, Ryan Dozier, Laurie Sproule</td>
</tr>
</tbody>
</table>

**Reporting Period**: January 1, 2023 - December 31, 2023

**Division Description**
Facility repair and maintenance, information technology, risk insurance, and facility planning.

### Data Services

<table>
<thead>
<tr>
<th>Activity</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamic 365 Fixes</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Dynamic 365 Enhancements</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Projects

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universal Intake</td>
<td>Develop intake for programs that don't have an electronic process.</td>
<td>60%</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Management System</td>
<td>Track and manage contracts within the Agency</td>
<td>90%</td>
<td>90%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-kind Management</td>
<td>Application is used to track the total number of in-kind hours with built in automation. This application will eliminate the current paper process.</td>
<td>70%</td>
<td>70%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CalAIM - KHS</td>
<td>New grant form Kern Health Systems for the CALAIM funding. IS part is to generate flat files used to data upload and verifying SFTP is working correctly.</td>
<td>85%</td>
<td>85%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>M Street Services Check in</td>
<td>Project is used to track the many paper processes involving giving meals, showers, and other items at the M Street facility</td>
<td>95%</td>
<td>95%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feeding America Service Insights Project</td>
<td>Effort to digitize the intake process for our Food Bank and partner sites.</td>
<td>20%</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Facilities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Work Orders</td>
<td>309</td>
<td>516</td>
<td>348</td>
<td>1527</td>
</tr>
</tbody>
</table>

#### Construction Projects

- **Head Start Expansion**: Harvey Hall, Pete Parra, 100%
- **Food Bank Expansion**: Access Road & Site Utilities, 85%

#### Major Maintenance Projects

- **Oasis Renovation**: 15%
- **Angela Martinez**: 15%
- **Stockdale HS**: 80%
- **Playgrounds**: Sterling, Angela Martinez, Pete Parra EHS, 55%
### Information & Technology Projects

<table>
<thead>
<tr>
<th>Description</th>
<th>% Completed</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>SJC WIFI Replacement</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Head Start Expansion</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Stockdale HS</td>
<td>In Progress</td>
<td></td>
</tr>
</tbody>
</table>

**Help Desk Work Orders**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Desk Work Orders</td>
<td>322</td>
<td>61</td>
<td>340</td>
<td>1384</td>
</tr>
</tbody>
</table>
### Program Highlights

#### Risk Management

<table>
<thead>
<tr>
<th>Workers Compensation Claims</th>
<th>Reported</th>
<th>Reported YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Report Only</td>
<td>9</td>
<td>32</td>
</tr>
<tr>
<td>First Aid</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Medical</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Modified Duty</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Lost Time</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Under Invest / Non-Ind / Students / Parents / Volunteers / Clients</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Property</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Vehicle Incident / Grand Theft Auto</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Motor Vehicle Accident</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>Work Place Violence / ODs / Death</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>23</strong></td>
<td><strong>77</strong></td>
</tr>
</tbody>
</table>

#### Program Strategic Goals

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop a facility deferred maintenance program.</td>
<td>Initiated planning discussion for new work order system. The system will be designed to capture all deferred maintenance of facilities, incorporate associated budgets, and schedule</td>
</tr>
<tr>
<td>Develop and implement a Data Governance strategy.</td>
<td>TBD</td>
</tr>
<tr>
<td>Enhance customer experience —measured</td>
<td>TBD</td>
</tr>
</tbody>
</table>

**Program Highlights**
Community Development

Grant Development
CAPK Foundation
Outreach & Marketing
2-1-1 Kern Call Center
Community Schools Partnership Program (CSPP)
<table>
<thead>
<tr>
<th>Month</th>
<th>Program/Division/Director</th>
<th>Program Manager</th>
<th>Reporting Period</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>May-23</td>
<td>Pritika Ram</td>
<td>Program Manager</td>
<td>January 1, 2023 - December 31, 2023</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Program Description

The services under the Executive Division range from fund and grant development/research to outreach and media/public relations, as well as new business development. This includes project management of agency level initiatives, such as the 2021-25 Strategic Plan and CAA-related plans, and special projects.

#### Outreach Social Media

<table>
<thead>
<tr>
<th></th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website User Sessions</td>
<td>25,827</td>
<td>127,884</td>
<td>230,000</td>
<td>135%</td>
<td>56%</td>
</tr>
<tr>
<td>Facebook Impressions</td>
<td>69,000</td>
<td>426,955</td>
<td>600,000</td>
<td>138%</td>
<td>71%</td>
</tr>
<tr>
<td>Other Social Media</td>
<td>24,000</td>
<td>82,917</td>
<td>150,000</td>
<td>192%</td>
<td>55%</td>
</tr>
</tbody>
</table>

#### Outreach Advocacy

- Attended NCAF Webinar that hosted 2023-2024 policy objectives
- Assisted with Valley Strong Huggy-Heart Campaign – Foundation Fundraiser
- Assisted with: Give Big Kern – The Foundation raised $900
- Attended all city and county meeting to proclaim May as Community Action Month
- Hosted Community Action Month resource fair and food distribution at the Shafter Youth Center
- Assisted with the Applied leadership BC graduation
- Hosted Book Giveaway and Resource Fair
- Assisting with the posting and marketing of the draft Community Action Plan
- Attended local PACT meeting sharing CAPK services with recent probation enrolled individuals
- Attended local Clinca Sierra Vista meeting to share CAPK services with case managers
- Attended local VOAD meeting to offer CAPK services to flooded Kern County regions in collaboration with the County EOC

#### Outreach Special Projects

- Bank of America Neighborhood Champions - This grant will fund emergency supplies for Oasis and East Kern Family Resource Centers to provide for clients in need of emergency products. The purchase of these products will increase inventory and the number of clients served at the Family Resource Centers.
- Strategic Plan Goal 1 - Food Insecurity Assessment - In progress. Transforming Local Communities is currently finalizing the assessment. Findings will be ready by July 2023.
<table>
<thead>
<tr>
<th>Community Action Partnership of Kern Monthly Report 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Community Highlights</strong></td>
</tr>
<tr>
<td><strong>Program Highlights</strong></td>
</tr>
<tr>
<td><strong>Program Strategic Goals</strong></td>
</tr>
<tr>
<td><strong>Progress Towards Goal</strong></td>
</tr>
<tr>
<td><strong>Foundation</strong></td>
</tr>
<tr>
<td><strong>Process Improvement (i.e., ROMA, PCDD)</strong></td>
</tr>
<tr>
<td><strong>Explanation (Over/Under Goal Progress)</strong></td>
</tr>
<tr>
<td><strong>Project Details</strong></td>
</tr>
</tbody>
</table>

**Union Pacific** - This grant will help fund and diversify care packages given to persons experiencing homelessness or are at-risk of homelessness in the East Kern/Mojave area with items such as tents, sleeping bags, and hygiene kits. The purchase of these products will increase inventory and the number of homeless clients served at the East Kern Family Resource Center.

**Emergency Solutions Grant** - Application submitted requesting $700,000 for rental arrears, security and utility deposits to support low-income city residents.

**San Joaquin Valley Air Pollution Control District** - This grant will purchase portable air cleaners for SYC to provide Shafter residents access to a clean air shelter as designated by SJVAPCD. Once approved, SJVAPCD will purchase and drop ship portable air cleaning units to SYC. Resolution required.

**Community Services Block Grant (CSBG)**

Preparation for 2023 CSD CSBG Organizational Standards submission (August 2023).

**Process Improvement (i.e., ROMA, PCDD)**

ROMA - A new cohort of ROMA Implementers will begin training in September of 2023. 7 Staff members have been identified for this round, and they have completed the preliminary application.

**Foundation**

Submitted Waterman Foundation Grant for SYC

Meeting with Rose Pereirra/Tri-Counties Bank

Attended Taft City Council meeting to proclaim May as Community Action Month

Attended KAN Workshop - Developing an effective BOD

Attended Shafter Resource Fair

Foundation modeling meeting with BARC

Attended weekly Friendship House Mixer Meeting

Gave presentation to Kern County Management Council

**Explanation (Over/Under Goal Progress)**

   - This project is active. Reassessing approach for the 2023 reporting by program. This will be led by the Information System team.

2. Increase grant development and marketing
   - Staff continue to meet weekly to discuss Goals 1-6.

3. Agency-level adoption of Results Oriented Management & Accountability (ROMA) and Patient-Centered Data Driven Principles to programmatic and operational use.
   - Second ROMA cohort has completed the training and obtained their ROMA certification. The third cohort will begin in Sept 2023.
The Community School Partnership Program (CSPP) provides direct wrap around case management to school families for students who are enrolled within Bakersfield City School District's Community Schools. The program links student families to community-based services addressing food insecurities, housing stability, or other related basic services. The program is modeled after the Four Pillars of a successful Community School designed to mitigate academic and social impacts of emergencies affecting its local communities and improve school responsiveness to student and family needs.

### Explanation (Over/Under Goal Progress)

All Case Managers are co-located at Bakersfield City School District's (BCSD) school sites. BCSD is the direct referrer of student families. Case Managers should primarily receive referrals through the school's Family and Community Engagement Liaisons, School Social Workers, and the Multi-Tiered System of Support (MTSS) monthly meetings. Case Managers reported that the MTSS meetings are either not held monthly as scheduled or it does not always produce student-family referrals for the Case Managers.

<table>
<thead>
<tr>
<th>Services</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Families referred to Program (SRV 7c)</td>
<td>28</td>
<td>166</td>
<td>920</td>
<td>37%</td>
<td>18%</td>
</tr>
<tr>
<td>Total Families referred internally for Employment Resources (2-1-1)</td>
<td>1</td>
<td>21</td>
<td>153</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Total Families referred internally for Food and Nutrition (2-1-1 or CalFresh)</td>
<td>9</td>
<td>41</td>
<td>153</td>
<td>71%</td>
<td>27%</td>
</tr>
<tr>
<td>Total Families referred internally for Housing (CES)</td>
<td>4</td>
<td>32</td>
<td>153</td>
<td>31%</td>
<td>21%</td>
</tr>
<tr>
<td>Total Families referred internally for Childcare (Head Start)</td>
<td>1</td>
<td>37</td>
<td>153</td>
<td>8%</td>
<td>24%</td>
</tr>
<tr>
<td>Total Families referred internally for Utility Assistance (Energy)</td>
<td>9</td>
<td>64</td>
<td>153</td>
<td>71%</td>
<td>42%</td>
</tr>
<tr>
<td>Total Families referred internally for Weatherization (Energy)</td>
<td>2</td>
<td>16</td>
<td>153</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Families Receiving Case Management Services (SRV 7a)</td>
<td>15</td>
<td>106</td>
<td>460</td>
<td>39%</td>
<td>23%</td>
</tr>
</tbody>
</table>

### Program Strategic Goals

1) Student-Families Recruitment

Case Managers set up tabling at school events to promote program services, distribute flyers, and interact with student-families. Tabling at events helped the Case Managers to become more visible within the schools and raise awareness to the parents in the community.
| 2) Increase internal awareness of other CAPK programs | Program Supervisor and Case Managers toured other CAPK programs. The purpose of the tours was to boost our knowledge on their unique services in order to relay the information to student-families in need of specific services. We toured the Energy Program and Friendship House and will continue with touring other programs as they become available. |

**Program Highlights**

CSPP is in process of finalizing a program logo and updating our flyers. Each school site had a graduation celebration for student-families that were involved with the Parent Resource Center throughout the school year. The 2022-2023 school year has come to an end. Each Case Manager participated in the end of the year activities and will continue to be on site during summer school. Summer school will be held from 6/12/2023 - 6/30/23.
The 2-1-1 Kern is a 24/7 information and referral service that provides local residents with comprehensive information and links to community health and human services at no cost. The 2-1-1 Kern has a database of 1,500 social service agencies that are available to the public through the 2-1-1 Kern Online Resource Directory at www.211KernCounty.org. The program has over 15 years of experience in providing and linking community members to vital services, and currently serves multiple communities in the Central Valley including Kings, Tulare, Stanislaus, Fresno, and Madera through the United Way partnerships.

### Information and Referral Services

<table>
<thead>
<tr>
<th>Calls Handled</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kern County (SRV 7c)</td>
<td>6,818</td>
<td>23,943</td>
<td>90,000</td>
<td>91%</td>
<td>27%</td>
</tr>
<tr>
<td>Kings County (SRV 7c)</td>
<td>240</td>
<td>1,306</td>
<td>4,000</td>
<td>72%</td>
<td>33%</td>
</tr>
<tr>
<td>Tulare County (SRV 7c)</td>
<td>849</td>
<td>4,255</td>
<td>18,000</td>
<td>57%</td>
<td>24%</td>
</tr>
<tr>
<td>Stanislaus County (SRV 7c)</td>
<td>899</td>
<td>4,239</td>
<td>19,200</td>
<td>56%</td>
<td>22%</td>
</tr>
<tr>
<td>Fresno &amp; Merced</td>
<td>1,966</td>
<td>10,852</td>
<td>20,000</td>
<td>118%</td>
<td>54%</td>
</tr>
<tr>
<td>Merced &amp; Mariposa (effective March 2022)</td>
<td>80</td>
<td>483</td>
<td>500</td>
<td>192%</td>
<td>97%</td>
</tr>
</tbody>
</table>

### Total I&R Calls Handled

<table>
<thead>
<tr>
<th>Calls Handled</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10,852</td>
<td>45,078</td>
<td>151,700</td>
<td>86%</td>
<td>30%</td>
</tr>
</tbody>
</table>

### Staffing vs. Call Volume

2-1-1 staff designated for calls handled across all counties contracts with the expectation of 42 calls per staff for an 8-hour shift.

<table>
<thead>
<tr>
<th>Current Staff</th>
<th>Staff Needed Per Call</th>
<th>Staff Over/ Short</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>29.0</td>
<td>(15.02)</td>
</tr>
</tbody>
</table>

### Grant Funded Services

<table>
<thead>
<tr>
<th>Calls Handled</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>CalFresh Application (SRV 7b &amp; SRV 7c)</td>
<td>8</td>
<td>35</td>
<td>300</td>
<td>32%</td>
<td>12%</td>
</tr>
<tr>
<td>Medi-Cal Application (SRV 7b &amp; SRV 7c)</td>
<td>5</td>
<td>16</td>
<td>100</td>
<td>60%</td>
<td>16%</td>
</tr>
<tr>
<td>First 5 Help Me Grow (HMG) Ages &amp; Stages New Children Screened (SRV 5c, SRV 7b &amp; SRV 7c)</td>
<td>26</td>
<td>156</td>
<td>300</td>
<td>104%</td>
<td>52%</td>
</tr>
</tbody>
</table>

### 2-1-1 Website Visitors

<table>
<thead>
<tr>
<th>Calls Handled</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicated Visitors (i.e., accessing 2-1-1 e-services and database resources)</td>
<td>17,599</td>
<td>100,334</td>
<td>225,000</td>
<td>94%</td>
<td>45%</td>
</tr>
</tbody>
</table>

### Other Calls

<table>
<thead>
<tr>
<th>Calls Handled</th>
<th>Month</th>
<th>YTD</th>
<th>Annual Goal</th>
<th>Month Progress</th>
<th>Annual Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIHEAP (SRV 7b &amp; SRV 7c)</td>
<td>6,081</td>
<td>25,798</td>
<td>45,000</td>
<td>162%</td>
<td>57%</td>
</tr>
<tr>
<td>Mental Health (SRV 7c)</td>
<td>414</td>
<td>1,764</td>
<td>3,700</td>
<td>134%</td>
<td>48%</td>
</tr>
<tr>
<td>Health and Human Service Referrals</td>
<td>11,676</td>
<td>35,573</td>
<td>110,000</td>
<td>127%</td>
<td>32%</td>
</tr>
<tr>
<td>Total Other Services</td>
<td>18,171</td>
<td>63,135</td>
<td>158,700</td>
<td>137%</td>
<td>40%</td>
</tr>
</tbody>
</table>
1. Recruitment and Retention of staff

2-1-1 is actively recruiting for 3 Information & Referral Specialists with the assistance of a Staffing Agency. The program has onboarded 1 Individual on 5/1/2023 as a temporary employee from the staffing agency and another Individual on 5/8/23 as a permanent employee. The program continues to offer database support, schedule accommodations, basic technical assistance and opportunities to recognize special occasions for existing employees to align with its overall objective of staff retention.

2. Contract Retention

2-1-1 continues to maintain communication between its partners and contract grantors with an objective to discuss progress and meet objectives, deliverables, and goals. The program is consistently working on meeting the reporting expectations of all funding sources and maintaining a trusting relationship to strengthen the opportunity for existing contracts to be retained.

Program Highlights

2-1-1 implemented changes with Titles and Job Descriptions for primary call handling to promote growth and professional development. The program held its monthly meeting with its United Way Partners to discuss progress in call handling and recruitment efforts. By way of contract, 2-1-1 supported 2-1-1 LA with their hard launch to begin accepting calls and providing direction for the CA vs Hate campaign.

Explanation (Over/Under Goal Progress)

2-1-1 consistently aims to meet or exceed monthly and annual goals for all counties. The program has experienced high call volumes attributed to callers request for tax preparation services and appointment needs. Although Kings, Tulare, and Stanislaus are under the annual goal, the call handling service continues to be a necessity for those counties.

Program Strategic Goals

<table>
<thead>
<tr>
<th>Program Strategic Goals</th>
<th>Progress Towards Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Recruitment and Retention of staff</td>
<td>2-1-1 is actively recruiting for 3 Information &amp; Referral Specialists with the assistance of a Staffing Agency. The program has onboarded 1 Individual on 5/1/2023 as a temporary employee from the staffing agency and another Individual on 5/8/23 as a permanent employee. The program continues to offer database support, schedule accommodations, basic technical assistance and opportunities to recognize special occasions for existing employees to align with its overall objective of staff retention.</td>
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<tr>
<td>2. Contract Retention</td>
<td>2-1-1 continues to maintain communication between its partners and contract grantors with an objective to discuss progress and meet objectives, deliverables, and goals. The program is consistently working on meeting the reporting expectations of all funding sources and maintaining a trusting relationship to strengthen the opportunity for existing contracts to be retained.</td>
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Program Highlights

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<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Funder</th>
<th>Amount Requested</th>
<th>Amount Awarded</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>KDA Creative Corps (Kern Dance Alliance)</td>
<td>Status: Abandon Reason: Grant opportunity did not fit current program support needs. Individuals will be eligible for a grant of up to $150,000 while organizations may request up to $300,000</td>
<td>KDA Creative Corps (Kern Dance Alliance)</td>
<td>$</td>
<td>$</td>
<td>Abandoned</td>
</tr>
<tr>
<td>Community Economic Resilience Funds (CERF)</td>
<td>KCCD is the lead agency. The purpose of the CERF funding is to build an equitable and sustainable economy across California’s diverse regions and foster economic growth.</td>
<td>Kern Community College District</td>
<td>$ 5,000,000.00</td>
<td>$ 160,000.00</td>
<td>Awarded</td>
</tr>
<tr>
<td>Kern Family Health Care Community Grant Program</td>
<td>This project will fund learning materials for FHCC students and a field trip to the California Science Center.</td>
<td>Kern Family Health Care (KFHC)</td>
<td>$ 4,000.00</td>
<td>$ 4,000.00</td>
<td>Awarded</td>
</tr>
<tr>
<td>Kern Family Health Care Community Grant Program</td>
<td>Funds from this grant will be used to purchase gas cards, bus passes, feminine products, and baby supplies for EKFR clients.</td>
<td>Kern Family Health Care (KFHC)</td>
<td>$ 4,000.00</td>
<td>$ 4,000.00</td>
<td>Awarded</td>
</tr>
<tr>
<td>Kern Family Health Care Community Grant Program</td>
<td>Funds from this grant will be used to purchase gas cards, bus passes, feminine products, and baby supplies for Ridgecrest residents.</td>
<td>Kern Family Health Care (KFHC)</td>
<td>$ 4,000.00</td>
<td>$ 4,000.00</td>
<td>Awarded</td>
</tr>
<tr>
<td>Kern Family Health Care Community Grant Program</td>
<td>Funds from this project will be utilized to purchase hygiene products for M St. Navigation Center clients.</td>
<td>Kern Family Health Care (KFHC)</td>
<td>$ 4,000.00</td>
<td>$ 4,000.00</td>
<td>Awarded</td>
</tr>
<tr>
<td>Kern Family Health Care Community Grant Program</td>
<td>Funds from this project will provide healthy cooking lessons for youth at SYC.</td>
<td>Kern Family Health Care (KFHC)</td>
<td>$ 4,000.00</td>
<td>-</td>
<td>Denied</td>
</tr>
<tr>
<td>Kern Family Health Care Community Grant Program</td>
<td>Funds for this project will provide office supplies, gas cards, and meals for VITA volunteers.</td>
<td>Kern Family Health Care (KFHC)</td>
<td>$ 4,000.00</td>
<td>-</td>
<td>Denied</td>
</tr>
<tr>
<td>Walmart Local Community Grant</td>
<td>Funds from this project will be utilized to purchase dental products for M St. Navigation Center clients.</td>
<td>Walmart</td>
<td>$ 5,000.00</td>
<td>-</td>
<td>Denied</td>
</tr>
<tr>
<td>Emergency Solutions Grant</td>
<td>Homeless prevention services that includes financial assistance with housing.</td>
<td>City of Bakersfield</td>
<td>$ 700,000.00</td>
<td>-</td>
<td>Denied</td>
</tr>
<tr>
<td>Neighborhood Champion</td>
<td>Funds from this project will support the FRCs emergency supply inventory for homeless and low-income families.</td>
<td>Bank of America</td>
<td>$ 50,000.00</td>
<td>-</td>
<td>Denied</td>
</tr>
<tr>
<td>Waterman Foundation Rotary Club of Bakersfield</td>
<td>Project funds requested new classroom tables and software for a stem program Shafter Youth Center new classroom tables and STEM software for Shafter Youth Center.</td>
<td>Bakersfield Waterman Foundation</td>
<td>$ 16,425.00</td>
<td>-</td>
<td>Pending</td>
</tr>
</tbody>
</table>
Local Food Promotion Program

Feasibility study on a food incubator. We will assess the local interest level on a food incubator to see if food vendors and entrepreneurs would benefit from these services.

US Department of Agriculture (USDA) $ 250,000.00 $ - Pending

CalMoneySmart Grant

CalMoneySmart is a grant program created by Senate Bill 455 (Ch. 478, Stats. 2019), which established the Financial Empowerment Fund. Through this program, the Department of Financial Protection and Innovation (DFPI) offers grants of up to $200,000 each.

Department of Financial Protection and Innovation (DFPI) $ 200,000.00 $ - Pending

Union Pacific Foundation Local Grants

This grant will help fund and diversify care packages given to persons experiencing homelessness or are at-risk of homelessness in the East Kern/Mojave area with items such as tents, sleeping bags, and hygiene kits. The purchase of these items will be made.

Union Pacific $ 25,000.00 $ - Pending

Volunteer Income Tax Assistance (VITA) Matching Grant

Free tax preparation assistance for low-income individuals.

US Internal Revenue Service (IRS) $ 325,000.00 $ - Pending

AB 836 Clean Air Centers Pilot Program

The Clean Air Centers Pilot Program was established by Assembly Bill 836, which provided funding to create Wildfire Smoke Clean Air Centers for Vulnerable Populations and establish a network of publicly accessible facilities with high-efficiency air filtration systems for valley residents who may not otherwise have access to clean air during wildfire events.

San Joaquin Valley Air Pollution Control District $ 4,000.00 $ - Research

Healthy Refrigeration Grant

CDFA will fund energy-efficient and climate-friendly refrigeration and freezer equipment in corner stores.

California Department of Food and Agriculture $ 76,336.98 $ - Research
# Community Action Partnership of Kern

## Funding Profile

<table>
<thead>
<tr>
<th>Funding Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Type</td>
</tr>
<tr>
<td>CAPK Program</td>
</tr>
<tr>
<td>Funding Agency</td>
</tr>
<tr>
<td>Project Name</td>
</tr>
<tr>
<td>CFDA</td>
</tr>
<tr>
<td>Target Population</td>
</tr>
<tr>
<td>Reapplication (Y/N)</td>
</tr>
<tr>
<td>Number to be served</td>
</tr>
<tr>
<td>Estimated Request</td>
</tr>
<tr>
<td>Division Director</td>
</tr>
<tr>
<td>Award Period</td>
</tr>
<tr>
<td>Program Manager</td>
</tr>
</tbody>
</table>

## Project Goal (One sentence goal statement)

This project intends to increase financial knowledge for low-income individuals and small businesses.

## Project Description (Brief one paragraph description)

Smart Steps will provide free financial education resources and one-on-one financial assistance to low-income individuals and small business owners. This program will be housed through VITA and will hire a full-time and part-time Financial Coach to oversee and guide participants through Smart Steps. The financial coaches will provide tailored one-on-one assistance and ensure participants meet their financial goals by creating a SMART goal plan to achieve by the end of the program year. Internal VITA program data will assist in selecting potential Smart Steps participants, which will be vital to the program's outreach efforts. Tri-Counties Bank has provided their commitment to this program by offering additional group-setting classes during the program year.

## Estimated Budget Summary

Our proposed budget for Smart Steps includes $155,314 for personnel and fringe benefits, $41,124 for program costs, and $3,562 for our 10% de minimis indirect cost rate (administrative cost). Three staff members will be responsible for the implementation and evaluation of the program. The Site Supervisor noted in our budget currently is not currently staffed in our VITA program. Her background in financial services, tailoring service delivery efforts, and providing culturally competent services will support the success of our Smart Steps Program. CAPK will recruit two individuals for the Financial Educator positions. Program costs will support staff onboarding and training, community engagement and marketing strategies, office and program supplies, as well as meal costs for meetings. Together, these elements will ensure that staff have the tools and resources to successfully attract program participants, retain their participation throughout the program, and evaluate the success of this model.

### Approvals:

**Freddy Hernandez**

[Signature]

May 30, 2023

**Artiha Ram**

[Signature]

May 30, 2023

**Jenny Webster**

[Signature]

May 31, 2023

1. Division Director

Date

4. Chief Financial Officer

Date

May 31, 2023

2. Chief Business Development Officer

Date

5. Chief Executive Officer

Date

May 31, 2023

3. Chief Program Officer

Date

May 31, 2023

### Date Presented / Approved:

PRE Approval:  
B&F Approval:  
Executive Approval:  
Board Approval:  

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Community Action Partnership of Kern  
Funding Profile

<table>
<thead>
<tr>
<th>Funding Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Type</strong></td>
</tr>
<tr>
<td><strong>Funding Agency</strong></td>
</tr>
<tr>
<td><strong>CFDA</strong></td>
</tr>
<tr>
<td><strong>Reapplicant (Y/N)</strong></td>
</tr>
<tr>
<td><strong>Estimated Request</strong></td>
</tr>
<tr>
<td><strong>Award Period</strong></td>
</tr>
</tbody>
</table>

**Target Population**  
Individuals eligible for Medicaid

**Project Name**  
Medicaid Redetermination Project

**Project Goal (One sentence goal statement)**  
The unwinding of federal Medicaid continuous coverage requirement necessitates a coordinated, phased communications plan to reach beneficiaries with messages across multiple channels using trusted messengers.

**Project Description (Brief one paragraph description)**  
On April 1st, Medi-Cal resumed its normal redetermination process. The process will span the next 14 months and will re-determine eligibility for about 15 million current beneficiaries. California’s Department of Health Care Services (DHCS) estimates that two to three million beneficiaries may lose their Medi-Cal coverage.

In order to keep Medi-Cal coverage, beneficiaries need to login to their accounts to make sure that addresses, phone numbers, and email addresses are current.

CAPK will support Kaiser and local partners through local outreach efforts that focus on education. We will raise awareness of actions beneficiaries need to take and when they need to take them in order to maintain coverage.

<table>
<thead>
<tr>
<th>Estimated Budget Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personnel and fringe</strong></td>
</tr>
<tr>
<td><strong>Local travel</strong></td>
</tr>
<tr>
<td><strong>Space costs</strong></td>
</tr>
<tr>
<td><strong>Supplies</strong></td>
</tr>
<tr>
<td><strong>Other operating costs</strong></td>
</tr>
<tr>
<td><strong>Indirect costs</strong></td>
</tr>
</tbody>
</table>

**Approvals:**

1. Division Director  
   Date: Jun 5, 2023

2. Chief Business Development Officer  
   Date: Jun 5, 2023

3. Chief Program Officer  
   Date: Jun 5, 2023

4. Chief Financial Officer  
   Date: Jun 5, 2023

5. Chief Executive Officer  
   Date: Jun 5, 2023

**Date Presented / Approved:**

PRE Approval:  
B&F Approval:  
Executive Approval:  
Board Approval:  

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<table>
<thead>
<tr>
<th><strong>Funding Type</strong></th>
<th>Private</th>
<th><strong>CAPK Program</strong></th>
<th>Coordinated Entry Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Agency</strong></td>
<td>Walmart</td>
<td><strong>Project Name</strong></td>
<td>Walmart Community Grant Program</td>
</tr>
<tr>
<td><strong>CFDA</strong></td>
<td>N/A</td>
<td><strong>Target Population</strong></td>
<td>Persons experiencing homelessness or are at-risk of homelessness</td>
</tr>
<tr>
<td><strong>Request</strong></td>
<td>$5,000</td>
<td><strong>Division Director</strong></td>
<td>Rebecca Moreno</td>
</tr>
<tr>
<td><strong>Award Period</strong></td>
<td>August 2023 – July 2024</td>
<td><strong>Program Manager</strong></td>
<td>Joseph Aguilar</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>$5,000 in funding is being requested to support CES programing needs. Primarily to help purchase client personal items such as clothing, hygiene kits, sleeping bags and tents.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Funding Type</strong></th>
<th>Private</th>
<th><strong>CAPK Program</strong></th>
<th>EKFRC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Agency</strong></td>
<td>Stater Bros. Market</td>
<td><strong>Project Name</strong></td>
<td>Stater Bros. Grants</td>
</tr>
<tr>
<td><strong>CFDA</strong></td>
<td>N/A</td>
<td><strong>Target Population</strong></td>
<td>Children Well-being - Mojave</td>
</tr>
<tr>
<td><strong>Request</strong></td>
<td>$2,500</td>
<td><strong>Division Director</strong></td>
<td>Freddy Hernandez</td>
</tr>
<tr>
<td><strong>Award Period</strong></td>
<td>August 2023 – January 2024</td>
<td><strong>Program Manager</strong></td>
<td>Anna Saavedra</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>$2,500 in funding is being requested to support East Kern Family Resource Center’s Play and Learn preschool and Home-based services programing needs. Specifically, to add healthy eating habits and nutrition lessons to their current curriculum.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Funding Type</strong></td>
<td>Private</td>
<td><strong>CAPK Program</strong></td>
<td>WIC</td>
</tr>
<tr>
<td>------------------</td>
<td>---------</td>
<td>------------------</td>
<td>-----</td>
</tr>
<tr>
<td><strong>Funding Agency</strong></td>
<td>Best Buy</td>
<td><strong>Project Name</strong></td>
<td>Event Sponsorship</td>
</tr>
<tr>
<td><strong>CFDA</strong></td>
<td>N/A</td>
<td><strong>Target Population</strong></td>
<td>Breastfeeding Mothers</td>
</tr>
<tr>
<td><strong>Request</strong></td>
<td>$5,000</td>
<td><strong>Division Director</strong></td>
<td>Susana Magana</td>
</tr>
<tr>
<td><strong>Award Period</strong></td>
<td>TBA</td>
<td><strong>Program Manager</strong></td>
<td>Lorna Speight</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>This funding opportunity will allow WIC to purchase incentives for an upcoming event, Breastfeeding Awareness Week.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Funding Type</strong></th>
<th>Private</th>
<th><strong>CAPK Program</strong></th>
<th>CalFresh</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Agency</strong></td>
<td>Best Buy</td>
<td><strong>Project Name</strong></td>
<td>Event Sponsorship</td>
</tr>
<tr>
<td><strong>CFDA</strong></td>
<td>N/A</td>
<td><strong>Target Population</strong></td>
<td>Community</td>
</tr>
<tr>
<td><strong>Request</strong></td>
<td>$6,000</td>
<td><strong>Division Director</strong></td>
<td>Susana Magana</td>
</tr>
<tr>
<td><strong>Award Period</strong></td>
<td>TBA</td>
<td><strong>Program Manager</strong></td>
<td>Alan Rodriguez</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>This funding opportunity will allow CalFresh to purchase incentives for upcoming outreach events promoting the services offered at CalFresh.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Recommendation**: Staff recommends approval to submit the small funding application(s) up to $50,000 per year and authorize the Chief Executive Officer to execute the contract if awarded, and any subsequent amendments throughout the duration of the contract term.

**Date Presented/Approved**

<table>
<thead>
<tr>
<th>Policy Council:</th>
<th>PRE Presentation:</th>
<th>B&amp;F Approval:</th>
<th>Board Approval:</th>
</tr>
</thead>
</table>
DIVISION/PROGRAM MONTHLY ACTIVITY REPORT

**Division/Director:** Head Start/State Child Development/Yolanda Gonzales  
**Month/Year:** May 2023

**Program/Work Unit:** Head Start/Early Head Start  
**Program Manager/Administrator:** Carol Hendricks/Robert Espinosa

**Services:** Head Start and Early Head Start childhood education for low-moderate income children ages 0-5 in center-based, part-day or full-day environments and home-based options.

<table>
<thead>
<tr>
<th>Program</th>
<th>Funded Enrollment</th>
<th>Reportable Enrollment</th>
<th>Percentage</th>
<th>Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head Start</td>
<td>1242</td>
<td>956</td>
<td>77%</td>
<td>6%</td>
</tr>
<tr>
<td>• 8 Classrooms</td>
<td>155</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fully Closed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Early Head Start</td>
<td>831</td>
<td>636</td>
<td>77%</td>
<td>22%</td>
</tr>
<tr>
<td>• 10 Classrooms</td>
<td>107</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fully Closed/Partially</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program</th>
<th>Over Income 131%+ up to 10%</th>
<th>Up to 35%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head Start</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Early Head Start</td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Home Visiting Program**

<table>
<thead>
<tr>
<th>Cumulative Enrollment</th>
<th>Contract Enrollment Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>209</td>
<td>240</td>
</tr>
</tbody>
</table>

**Division Staffing = 701**

<table>
<thead>
<tr>
<th>Currently Employed</th>
<th>Vacant Positions</th>
<th>Continuous Family Leave</th>
<th>Intermittent Family Leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>589</td>
<td>112</td>
<td>26</td>
<td>53</td>
</tr>
</tbody>
</table>

**HIGHLIGHTS:** 12 staff were onboarded, and 11 resignations. 7 interviews were conducted for 4 open requisitions.

**Program Update & Compliance**

**Kern:**
- 5/6- Latina Mental Health Fair
- 5/6- Healthy Minds Resource Fair
- 5/12- DHS Resource Fair
- 5/13- CAPK Resource Fair (Shafter)
- 5/20- East Bakersfield Festival
- 5/24- CAPK Children’s Book Give Away

**SJC:**
- Staff received a reminder trainer in emergency preparedness for disaster and earthquake drills. All center and socialization room received emergency food.
- Community Medical Center had a dental clinic at St, Mary’s center.
- Classroom materials ordered for centers using QRIS monies. The order consisted of STEM and Loose Parts materials.
- Two Social Emotional Development Parent Workshops- Tucker Turtle (English/Spanish)
- El Concilio Parent Workshop- Emotional Health for Children (English/Spanish)
- Recruitment events: Human Services Agency; Mental Health Awareness Fair, and the Army and Air Force Exchange.

Partnership:
- 5/10- Mother’s Day Picnic at Escuelita Hernandez
- 5/11- Family Picnic at Garden Pathways
- Bakersfield College center completed their QRIS review and earned a 5-star rating. They are also entering into the program self-assessment component of the NAEYC accreditation process.
- Taft College Center completed their State Review, receiving 97% and zero deficiencies.

Program:
- The Office of Head Start has released the Program Information Report (PIR) that must be completed by all federally funded Head Start (HS) and Early Head Start (EHS) programs. The deadline to submit the 2022-2023 PIR is August 31, 2023.
- The PIR provides comprehensive data on services, staff, children, and families served by HS and EHS. PIR data is used many ways including:
  - To describe demographics of children and qualifications of staff;
  - To report the cumulative number of children enrolled throughout the program year;
  - To describe and quantify the services delivered; and
  - To identify trends among the PIR data reported
- Staff have been reviewing reports and data to ensure accurate and timely submission of the PIR.

<table>
<thead>
<tr>
<th>Central Kitchen</th>
<th>May 2023</th>
<th>Total # Prepared</th>
<th>Breakfast</th>
<th>Lunch</th>
<th>Snack</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals &amp; Snacks</td>
<td></td>
<td>55,697</td>
<td>20,807</td>
<td>17,053</td>
<td>17,873</td>
</tr>
<tr>
<td>Center Totals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HIGHLIGHTS:** Center staff continued to request cafeteria experience forms to incorporate the transitional experience to kindergarten with the children. There was a total of 16 cafeteria experiences in the month of May.

<table>
<thead>
<tr>
<th>CACFP</th>
<th>April 2023</th>
<th>Total Meals Delivered</th>
<th>Meals Allocated</th>
<th># of Meals Served</th>
<th>% of Meals Served</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Central Kitchen</td>
<td>Vendor Meals</td>
<td>Total Meals</td>
<td>CACFP/USDA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>54,202</td>
<td>8,968</td>
<td>63,170</td>
<td>26,124</td>
</tr>
</tbody>
</table>
MEMORANDUM

To: Program Review & Evaluation - PRE-Committee

From: Yolanda Gonzales – Director of Head Start/State Child Development

Date: June 14, 2023

Subject: Agenda Item 5d: Strategic Plan 2021-2025 – Goal 2 Update – Info Item

Strategic Goal 2 – All families in the communities we serve have access to high quality early learning and care choices to meet their diverse needs.

The team continues the process of collaborating with internal and external community partners that can help expand educational support services for the communities in Kern County.

- The Shafter Youth Center collaborated with the County of Kern in another job fair for the community of Shafter.
- Bakersfield College students were offered internship opportunities by the Friendship House and other CAPK departments in hopes of strengthening our partnerships within the community.
- The VITA program provided tax education services to 50 volunteers throughout Kern County.
- Community Action Partnership of Kern partnered with Bakersfield College on a new opportunity to assist our staff with professional development opportunities. Bakersfield College created the Applied Leadership Courses led by Dr. Maria Wright.
- The Head Start Program in collaboration with the San Joaquin County Office of Education created a job fair that turned out to be extremely successful. Head Start received 39 job applications and conducted 17 in person interviews which lead to a decent number of possible candidates.
- Head Start is still in the process of opening a Toddler option at the Ridgecrest facility to ensure we meet the needs of the community.

Group 2 met on June 2nd and is scheduled to meet again August 4th, 2023.

Attachment: Action Plan by Team Member Report - Yolanda Gonzales
Yolanda Gonzales  
My Summary for 2023  

Mission Statement
Community Action Partnership of Kern will address underlying causes of poverty, alleviate the effects, and promote dignity and self-sufficiency in the communities we serve.

Vision Statement
We envision communities where all people have equal opportunities to achieve greater self-sufficiency and attain their version of the American Dream.

Performance Summary
3 Goals
- 33% Achieved
- 33% On Target
- 33% Off Target
- 0% Critical
- 0% Deferred
- 0% Not Started

My Items

<table>
<thead>
<tr>
<th>Item</th>
<th>YTD Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1: Expand access to services and resources for health and safety of children and youth by providing a safe environment.</td>
<td>75%</td>
</tr>
<tr>
<td>2.1.1: Identify and leverage emerging funding opportunities to expand services for both early childcare and youth services.</td>
<td></td>
</tr>
<tr>
<td>2.1.2: Assess emerging needs in geographic areas not currently served by CAPK.</td>
<td></td>
</tr>
<tr>
<td>2.2: Support the quality and availability of non-traditional hours of service.</td>
<td></td>
</tr>
<tr>
<td>2.2.1: Expand service area and services to families by partnerships with existing agencies serving the 0-17 population. Expand the number of...</td>
<td>25%</td>
</tr>
<tr>
<td>2.2.1.1: Seek new funding streams for increasing the capacity of family resource centers, youth centers, and childcare centers to support...</td>
<td></td>
</tr>
<tr>
<td>2.2.1.2: Partner with resource agencies to identify potential providers that would benefit from a CAPK partnership to advocate for the...</td>
<td></td>
</tr>
<tr>
<td>2.2.2: Continue to work with partners like the Community Connection for Child Care (CCCC) on referrals and partnerships to increase capacity of...</td>
<td></td>
</tr>
<tr>
<td>2.3: Support workforce development and employment opportunities for CAPK clients.</td>
<td></td>
</tr>
<tr>
<td>2.3.1: Collaborate with adult schools, community colleges, and vocational trade schools to support and strengthen education pathways and...</td>
<td></td>
</tr>
<tr>
<td>2.3.1.1: Develop, maintain, and attract a skilled, adaptable, and diverse workforce by providing opportunities for self-sufficiency through...</td>
<td></td>
</tr>
<tr>
<td>2.3.1.2: Establish streamlined referral pathways and identify available point person (transition specialist and/or relevant intake personnel) at...</td>
<td></td>
</tr>
<tr>
<td>2.3.1.3: Obtain any relevant learning/professional pathway mapping from educational and training institutions to review with interested clients...</td>
<td></td>
</tr>
<tr>
<td>2.3.2: Establish a diverse workforce committee with partnerships to formalize pathways from entry-level to advanced positions through...</td>
<td></td>
</tr>
<tr>
<td>2.3.2.1: Develop and formalize internal pathway mapping inclusive of education/training to benefit clients and community members.</td>
<td></td>
</tr>
<tr>
<td>2.3.2.2: Identify and implement mechanisms to provide ongoing support to participants.</td>
<td></td>
</tr>
</tbody>
</table>
## Yolanda Gonzales
### My Items for 2023

#### Objective
**Expand access to services and resources for health and safety of children and youth by providing a safe environment. (2.1)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **75%**
  - **0%**
- **YTD Actual:** 10/01/21
- **YTD Target:** 39.1%
- **Last updated:** 12/07/22

#### Activity
**Identify and leverage emerging funding opportunities to expand services for both early childcare and youth services. (2.1.1)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **0%**
  - **100%**
- **YTD Actual:** 01/01/23
- **YTD Target:** 41.2%
- **Last updated:** 10/06/21

#### Activity
**Assess emerging needs in geographic areas not currently served by CAPK. (2.1.2)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **0%**
  - **100%**
- **YTD Actual:** 01/01/23
- **YTD Target:** 41.2%
- **Last updated:** 10/06/21

#### Objective
**Support the quality and availability of non-traditional hours of service. (2.2)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **25%**
  - **0%**
- **YTD Actual:** 10/01/21
- **YTD Target:** 39.1%
- **Last updated:** 12/07/22

#### Activity
**Expand service area and services to families by partnerships with existing agencies serving the 0-17 population. Expand the number of home care childcare providers to support early childhood care and development. (2.2.1)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **0%**
  - **100%**
- **YTD Actual:** 01/01/23
- **YTD Target:** 41.2%
- **Last updated:** 10/06/21

#### Activity
**Continue to work with partners like the Community Connection for Child Care (CCCC) on referrals and partnerships to increase capacity of existing and new provider networks (2.2.2)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **25%**
  - **0%**
- **YTD Actual:** 10/01/21
- **YTD Target:** 39.1%
- **Last updated:** 10/06/21

#### Objective
**Support workforce development and employment opportunities for CAPK clients. (2.3)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **45%**
  - **0%**
- **YTD Actual:** 10/01/21
- **YTD Target:** 39.1%
- **Last updated:** 06/05/23

#### Activity
**Collaborate with adult schools, community colleges, and vocational trade schools to support and strengthen education pathways and referral mechanisms for clients, community members, as well as staff. (2.3.1)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **0%**
  - **100%**
- **YTD Actual:** 01/01/23
- **YTD Target:** 41.2%
- **Last updated:** 10/06/21

#### Activity
**Establish a diverse workforce committee with partnerships to formalize pathways from entry-level to advanced positions through comprehensive career fields. (2.3.2)**

- **Owner:** Yolanda Gonzales
- **Measure:** Percent Complete
  - **0%**
  - **20.5%**
- **YTD Actual:** 01/01/23
- **YTD Target:** 20.5%
- **Last updated:** 10/06/21
No goals to display.
MEMORANDUM

To: Program Review & Evaluation Committee

From: Rebecca Moreno, Director of Housing & Supportive Services

Date: June 14, 2023

Subject: Agenda Item 5d: Strategic Plan 2021-2025 – Goal 3 Update - Info Item

CAPK’s Strategic Goal 3 is to advance economic empowerment and financial stability for low-income people in the communities we serve. We hope to achieve this goal through the following objectives as approved by the CAPK Board:

- 3.1 – Increase housing stability for people experiencing/at risk of homelessness.
- 3.2 – Increase CAPK capacity to provide long-term affordable housing solutions for low-to-moderate income people and families.
- 3.3 – Increase opportunities and supports for clients to advance through career and education pathways.
- 3.4 – Increase access to economic asset enhancement and financial educational opportunities.

Team members for Goal Group 3 include: Rebecca Moreno (lead), Keith Jackson, Savannah Maldonado, Sylvia Ortega, Bradley Fergon, Louis Gill, and Wilfredo Cruz. The group continues to meet monthly to discuss new ideas and progress on Goal 3 objectives.

During the last quarter, the group has continued to identify several opportunities being led by Community Development programs/efforts that enhance housing services for impacted populations in collaboration with the Bakersfield Kern Regional Homeless Collaborative and wraparound services through other departments, programs, and external stakeholders. Below is a short list of accomplishments from the last three months:

- Safe Camping and Safe Parking programs at M Street have launched well and are seeing results. All tents (41) in the Safe Camping area are currently inhabited, and there is a long waiting list for clients wanting to use the space. (3.1.2)
  - 17 people matched to a voucher/subsidies
  - 9 housed via vouchers/subsidies
  - 19 moved into the M Street shelter
  - 25 total people in Safe Parking
- M Street continues to function at a high capacity and quality service. (3.1.2)
  - 232 total housed via vouchers/subsidies
  - 18 working jobs in the community
  - 3 graduates from the last cohort of Project Hire Up
8 attended the financial literacy program through Chase bank

- CES process changes for the CoC continue to improve “throughput” for clients who need permanent supportive housing. (3.1.1)
- CES Cal-AIM staff have been onboarded and continue to work with KHS on the data exchange. (3.1.2)
  - 624 referrals have been received
  - 11 housing placements
  - 220 active clients

The team continues to meet and identify opportunities that will effectively support CAPK’s Goal 3 and the communities we serve.

**Attachment:**
*Action Plan Summary by Goal Group #3*
Mission Statement
Organizational Slogan
Community Action Partnership of Kern will address underlying causes of poverty, alleviate the effects, and promote dignity and self-sufficiency in the communities we serve.

Vision Statement
We envision communities where all people have equal opportunities to achieve greater self-sufficiency and attain their version of the American Dream.

Performance Summary
1 Goals
- 0% Achieved
- 100% On Target
- 0% Deferred
- 0% Not Started

My Items
<table>
<thead>
<tr>
<th>Item</th>
<th>YTD Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1: Increase housing stability for people experiencing or at risk of homelessness.</td>
<td>45%</td>
</tr>
<tr>
<td>3.1.1: Strengthen community support for reducing homelessness in alignment with the &quot;Home at Last! Kern County’s Plan to End Homelessness...</td>
<td>50%</td>
</tr>
<tr>
<td>3.1.2: Reduce impact of homelessness by ensuring continued provision of sufficient emergency shelter assistance and referral services.</td>
<td>45%</td>
</tr>
</tbody>
</table>
## Rebecca Moreno
### My Items for 2023

#### Objective
Increase housing stability for people experiencing or at risk of homelessness. (3.1)  
(last updated: 05/17/23)

**Aligned to:** #3 Economic Empowerment

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebecca Moreno</td>
<td>45%</td>
<td>10/01/21</td>
<td>12/31/25</td>
</tr>
</tbody>
</table>

### Activity
Strengthen community support for reducing homelessness in alignment with the "Home at Last! Kern County's Plan to End Homelessness by 2028" 10-year plan. (3.1.1)  
(last updated: 04/07/22)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebecca Moreno</td>
<td>50%</td>
<td>10/01/21</td>
<td>12/31/25</td>
</tr>
</tbody>
</table>

### Activity
Reduce impact of homelessness by ensuring continued provision of sufficient emergency shelter assistance and referral services. (3.1.2)  
(last updated: 06/06/23)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebecca Moreno</td>
<td>45%</td>
<td>10/01/21</td>
<td>12/31/25</td>
</tr>
</tbody>
</table>
Rebecca Moreno
Contributing to for 2023

Objective
Increase CAPK capacity to provide long-term affordable housing solutions for low-to-moderate income people and families. (3.2) (Last updated: 09/02/22)
Aligned to: #3 Economic Empowerment

Objective
Increase opportunities and supports for clients to advance through career and education pathways. (3.3) (Last updated: 09/29/22)
Aligned to: #3 Economic Empowerment

Activity
Strengthen and expand relationships with adult education providers (adult schools and community colleges), local employers, and industry leaders to build job skills and increase access to career and education pathways. (3.3.1) (Last updated: 11/14/22)

Sub-Activity
Identify and map existing educational/career pathways and referral points. (3.3.1.1) (Last updated: 10/06/21)

Sub-Activity
Send CAPK representatives to local Adult Education Consortium Steering Committee Meetings. (3.3.1.2) (Last updated: 10/06/21)
### Sub-Activity
**Participate in local workforce development board meetings to identify entry points, opportunities, partnerships** (3.3.1.3)  
(Last updated: 10/06/21)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 73.9%</th>
<th>12/31/23</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

### Objective
**Increase access to economic asset enhancement and financial educational opportunities.** (3.4)  
(Last updated: 09/02/22)

**Aligned to: #3 Economic Empowerment**

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
<th>12/31/25</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>32%</td>
</tr>
</tbody>
</table>

### Activity
**Identify and pursue opportunities to address financial service gaps in Kern County including the possibility of developing new, standalone asset enhancement/ financial educational program(s).** (3.4.2)  
(Last updated: 02/09/22)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
<th>12/31/25</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>33%</td>
</tr>
</tbody>
</table>

### Sub-Activity
**Complete ongoing assessment of financial service mapping and utilization (i.e., CDFI/CDC assessment) and identify potential gaps.** (3.4.2.1)  
(Last updated: 02/09/22)

**Last comment:** Staff presented the CDFI assessment during the 1/26 Board meeting and was not approved to begin the next phase of CDFI development. Instead, staff received approval to pursue a partnership with local CDFIs. PR will update the progress for this activity as 90% with the remaining 10% to be allocated on partnership development to start services (note: undetermined scope of services).  
(02/09/22)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
<th>12/31/25</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

### Sub-Activity
**Complete internal capacity assessment to evaluate potential for delivery of new financial services.** (3.4.2.2)  
(Last updated: 10/06/21)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
<th>12/31/25</th>
</tr>
</thead>
<tbody>
<tr>
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<td>0%</td>
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<td>0%</td>
</tr>
</tbody>
</table>

### Sub-Activity
**Based on assessment findings, scope of need, and available funding, develop service delivery model to establish a new program with central focus on asset enhancement and financial education/support.** CAPK will need to identify additional key action steps depending on the outcome of the assessment and the decision of the Board. (3.4.2.3)  
(Last updated: 10/06/21)

<table>
<thead>
<tr>
<th>Owner</th>
<th>Measure: Percent Complete</th>
<th>YTD Actual</th>
<th>YTD Target: 39.1%</th>
<th>12/31/25</th>
</tr>
</thead>
<tbody>
<tr>
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<td>0%</td>
</tr>
</tbody>
</table>
CAPK’s Strategic Goal 5 group has completed the first phase of the Client Data Platform. This phase included the logic to bring in all our Program’s data into a single source of truth. To continue the success of the CDP, the IS department will continue to onboard programs into the platform for easier consumption of our agency’s data.

The next steps for Goal 5 are to meet and discuss ways our Programs and utilize this data and have the groups help in detailing our Data governance policy.

ROMA group 2 has signed up and will begin their journey through the ROMA certification process.

Attachment:  
Action Plan Summary by Goal Group #5 – Update 6
## 5 Data-Driven Decision-Making

Increase utilization of data-driven decision-making processes to improve organizational capacity to achieve results.

<table>
<thead>
<tr>
<th>Goals</th>
<th>Owner</th>
<th>Start Date</th>
<th>End Date</th>
<th>Days Left</th>
<th>Rollup</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 Enhance agency-wide capacity to implement continuous improvement framework</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/25</td>
<td>As of 10/06/21</td>
<td>AVG</td>
</tr>
<tr>
<td>5.1.2 Adopt and incorporate integrated work plan/training schedules into CAPK Board's operations and workflows</td>
<td>Emilio Wagner</td>
<td>01/01/23</td>
<td>12/31/23</td>
<td>As of 10/06/21</td>
<td></td>
</tr>
<tr>
<td>5.1.3 Provide training to all staff, leadership, and Board members on ROMA principles and practices</td>
<td>Emilio Wagner</td>
<td>01/01/23</td>
<td>12/31/24</td>
<td>As of 10/06/21</td>
<td></td>
</tr>
<tr>
<td>5.2 Enhance data governance structures and practices to support implementation of ROMA and to increase consistency, accuracy, and breadth of program reporting and data analytics</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/25</td>
<td>As of 03/07/23</td>
<td>AVG</td>
</tr>
<tr>
<td>5.2.2 Conduct agencywide data governance assessment to identify most pressing needs and to inventory existing data processes and workflows</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/23</td>
<td>As of 03/07/23</td>
<td>AVG</td>
</tr>
<tr>
<td>5.2.2.1 Identify challenges at program level around data collection and validation</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/23</td>
<td>As of 04/14/22</td>
<td></td>
</tr>
<tr>
<td>5.2.2.2 Assess availability of analytic/reporting tools, capacity to utilize existing tools</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/23</td>
<td>As of 03/11/22</td>
<td></td>
</tr>
<tr>
<td>5.2.2.3 Identify needed investment in data dashboards or tools to provide leadership with real time agency-wide outputs and demographic data</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/23</td>
<td>As of 03/07/23</td>
<td></td>
</tr>
<tr>
<td>5.3 Establish a comprehensive model to address the health and social well-being of our clients through timely interventions</td>
<td>Emilio Wagner, Ryan Dozier, Joseph Aguilar, Chase Rangel, Eric Kelley</td>
<td>10/01/21</td>
<td>12/31/25</td>
<td>As of 06/07/23</td>
<td>AVG</td>
</tr>
<tr>
<td>Measure</td>
<td>Percent Complete</td>
<td>EOY Target</td>
<td>As of</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------</td>
<td>-----------------</td>
<td>------------</td>
<td>-------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.3.1 Advance efforts to establish centralized database for client intake and service log.</td>
<td>100% of 73.9%</td>
<td>100%</td>
<td>06/07/23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Emilio Wagner
Ryan Dozier Joseph Aguilar Chase Rangel Eric Kelley
10/01/21 12/31/23
Budget & Finance Committee Minutes

1. **Call to Order**

   Committee Chair Michelle Jara-Rangel called the meeting to order at 12:01 at the Community Action Partnership of Kern Administrative Building, located at 5005 Business Park North, Bakersfield, CA.

2. **Roll Call**

   Roll call was taken with a quorum present.

   Present: Michelle Jara-Rangel (Chair), Denise Boshers, and Nila Hogan

   Absent: None

   Others present: Jeremy Tobias, Chief Executive Officer; Tracy Webster, Chief Financial Officer; Louis Gill, Chief Program Officer; Freddy Hernandez, Director of Youth and Community Services; Rebecca Moreno, Director of Community Development; and other CAPK staff.

3. **Public Comments**

   No one addressed the Committee.

4. **New Business**

   a. **Head Start / Early Head Start Budget to Actual Reports for April 2023** – Tracy Webster, Chief Executive Officer – *Info Item*

      Tracy Webster presented the above info item and provided a summary of the two attached reports.

   b. **Resolution to Approve the Submission of the 2022 Department of Energy Bipartisan Infrastructure Law Weatherization Assistance (DOE BIL WAP) Contract #22P-7010** – *Action Item*

      Wilfredo Cruz presented the above action item and reported on June 15, 2023, the California Department of Community Services and Development (CSD) provided the Energy Program with the 2022 DOE BIL WAP contract. The $3,000,000 contract provides funding to assist qualified low-income Kern County residents with Weatherization services. This 5-year contract period is from June 1, 2023 through August 30, 2027.

      The contract allows CAPK’s Energy Program the opportunity to assist eligible low-income Kern County households with weatherization and energy related home repairs at no cost to the participants. This program supports the federal and state efforts to answer the concerns of rising energy prices and to assist low-income households with heating and cooling costs. The work connects to CAPK’s mission and Strategic Goal 3, advancing economic empowerment and financial stability for low-income people in the community we serve.
c. Strategic Plan Goal 6 Update – Tracy Webster, Chief Financial Officer – **Info Item**

Tracy Webster presented the above info item to highlight the accomplishments of Goal Group 6 which is charged with Increasing fiscal health and stability of the agency to properly align resources to support clients and build capacity staff.

Tracy reported the group has identified a software system and has begun the implementation process. The Operations team is actively working on putting together a deferred maintenance plan for CAPK and a schedule of maintenance. This is a daunting task, but upon completion, we will have a comprehensive view of what to budget for from year to year in terms of facility improvement.

The Finance Department continues to generate indirect funds from existing programming and develops baseline and projected targets by program. Unrestricted funding capacity has grown and there has not been a need to pull from the line of credit since July 2020.

The CAPK Foundation’s Director has developed fundraising plans, and is actively cultivating donors, and prospecting, stewardship for long term support, and working on Board development.

d. April 2023 Financial Statements – Tracy Webster, Chief Financial Officer – **Action Item**

Tracy Webster presented the above action item for approval and reported that the agency did not require a draw from the line of credit during the month of April. We are able to sustain an adequate unrestricted cash balance to cover programs such as Energy, which currently has a negative balance of $1,174,196.83.

The Central Kitchen expenditures are currently 11.9% at the end of 04/30/2023 and USDA revenue is at 11.8%. Expenditures are equivalent to the target of 16.7% (2 of 12 months).

CMAP is currently earning 60.7% as of April 30, 2023. The target for this period should be 83.3%.

Center based state programs (CSPP, CMIG and CCTR) reflect average attendance/enrollment for the current period. CCTR is at 74.4%, CSPP is at 64.7%, and CMIG is at 23.2%. CSPP received an increase in contract from $4,544,694 to $7,153,992 (increase $2,609,298)

Additionally, we have been operating a CCTR program in San Joaquin County sponsored by SJCOE. The current attendance is 38.0% with a target of 83.3%.

At the time of this report, the Finance Division has one vacancy in staffing. The Finance Team is currently working with SageIntacct on the accounting software platform conversion. The agency expenditure is currently at 14% for the year. This is aligned with the goal of 16.7%.

The Indirect Fund budget to actual report for April month end showed that revenue is excess expenditures by $291,447 which is 23.6% of the budgeted indirect surplus. Overall expenditures are 12.1% of the budget and matches the target of 16.7% (2 of 12 months).

Motion was made and seconded to approve staff’s recommendation. Carried by unanimous vote (Boshers/Hogan).
5. **Committee Member Comments**
   - No Comments.

6. **Next Scheduled Meeting**
   Wednesday, August 16, 2023
   5005 Business Park North
   Bakersfield, CA  93309

7. **Adjournment**

   The meeting was adjourned at 12:15 pm.
MEMORANDUM

To: Budget and Finance Committee

From: Tracy Webster, CFO/ Louis Rodriguez, Finance Administrator

Date: June 21, 2023

Subject: Head Start
Budget to Actual Report for the period ended April 30, 2023 – Info Item

The Office of Head Start has awarded CAPK the full amount of its Head Start and Early Head Start grant for a five-year budget period, the fifth-year budget period is March 1, 2023, through February 29, 2024.

The following are highlights of the Head Start Budget to Actual Report for the period of March 1, 2023, through April 30, 2023. Two months (16.7%) of the 12-month budget period have elapsed.

**Base Funds**

Overall expenditures are at 10% of the budget.

**Training & Technical Assistance Funds**

Overall expenditures are at 24% of the budget.

**Non-Federal Share (Head Start and Early Head Start combined)**

The non-Federal share is at 10% of the budget.
### BASE FUNDS

<table>
<thead>
<tr>
<th>Description</th>
<th>Budget</th>
<th>Actual</th>
<th>Remaining</th>
<th>% Spent</th>
<th>% Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERSONNEL</td>
<td>9,709,705</td>
<td>810,369</td>
<td>8,899,336</td>
<td>8%</td>
<td>92%</td>
</tr>
<tr>
<td>FRINGE BENEFITS</td>
<td>3,926,571</td>
<td>243,046</td>
<td>3,683,525</td>
<td>6%</td>
<td>94%</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>-</td>
<td>-</td>
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<td>-</td>
<td>-</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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</tr>
<tr>
<td>SUPPLIES</td>
<td>717,567</td>
<td>125,385</td>
<td>592,182</td>
<td>17%</td>
<td>83%</td>
</tr>
<tr>
<td>CONTRACTUAL</td>
<td>129,742</td>
<td>8,408</td>
<td>121,334</td>
<td>6%</td>
<td>94%</td>
</tr>
<tr>
<td>CONSTRUCTION</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>OTHER</td>
<td>2,369,344</td>
<td>447,222</td>
<td>1,922,122</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>1,628,603</td>
<td>146,600</td>
<td>1,482,003</td>
<td>9%</td>
<td>91%</td>
</tr>
<tr>
<td><strong>TOTAL BASE FUNDING</strong></td>
<td><strong>18,481,532</strong></td>
<td><strong>1,781,030</strong></td>
<td><strong>16,700,502</strong></td>
<td><strong>10%</strong></td>
<td><strong>90%</strong></td>
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</table>

### TRAINING & TECHNICAL ASSISTANCE

<table>
<thead>
<tr>
<th>Description</th>
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<th>Actual</th>
<th>Remaining</th>
<th>% Spent</th>
<th>% Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAVEL</td>
<td>41,904</td>
<td>9,310</td>
<td>32,594</td>
<td>22%</td>
<td>78%</td>
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<tr>
<td>SUPPLIES</td>
<td>23,986</td>
<td>5,222</td>
<td>18,764</td>
<td>22%</td>
<td>78%</td>
</tr>
<tr>
<td>CONTRACTUAL</td>
<td>22,800</td>
<td>442</td>
<td>22,358</td>
<td>2%</td>
<td>98%</td>
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<tr>
<td>OTHER</td>
<td>72,752</td>
<td>23,126</td>
<td>49,626</td>
<td>32%</td>
<td>68%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>16,144</td>
<td>3,798</td>
<td>12,346</td>
<td>24%</td>
<td>76%</td>
</tr>
<tr>
<td><strong>TOTAL TRAINING &amp; TECHNICAL ASSISTANCE</strong></td>
<td><strong>177,586</strong></td>
<td><strong>41,898</strong></td>
<td><strong>135,688</strong></td>
<td><strong>24%</strong></td>
<td><strong>76%</strong></td>
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</table>

### CARRYOVER

<table>
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<tr>
<th>Description</th>
<th>Budget</th>
<th>Actual</th>
<th>Remaining</th>
<th>% Spent</th>
<th>% Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUPPLIES</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>CONTRACTUAL</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td>CONSTRUCTION</td>
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<td>-</td>
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<td>-</td>
</tr>
<tr>
<td>OTHER</td>
<td>-</td>
<td>-</td>
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<td>-</td>
<td>-</td>
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<tr>
<td>OTHER - CARES</td>
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<td>-</td>
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<tr>
<td>INDIRECT</td>
<td>-</td>
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<td>-</td>
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<tr>
<td><strong>TOTAL CARRYOVER</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
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### GRAND TOTAL HS FEDERAL FUNDS

<table>
<thead>
<tr>
<th>Description</th>
<th>Budget</th>
<th>Actual</th>
<th>Remaining</th>
<th>% Spent</th>
<th>% Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18,659,118</td>
<td>1,822,928</td>
<td>16,836,190</td>
<td>10%</td>
<td>90%</td>
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</tbody>
</table>

### HEAD START and EARLY HEAD START COMBINED NON-FEDERAL SHARE

<table>
<thead>
<tr>
<th>Source</th>
<th>Budget</th>
<th>Actual</th>
<th>Remaining</th>
<th>% Spent</th>
<th>% Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN-KIND</td>
<td>1,958,398</td>
<td>877,348</td>
<td>1,081,050</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>CALIF DEPT OF ED</td>
<td>11,131,398</td>
<td>1,901,957</td>
<td>9,229,441</td>
<td>17%</td>
<td>83%</td>
</tr>
<tr>
<td><strong>TOTAL NON-FEDERAL</strong></td>
<td><strong>13,089,796</strong></td>
<td><strong>2,779,305</strong></td>
<td><strong>10,310,491</strong></td>
<td><strong>21%</strong></td>
<td><strong>79%</strong></td>
</tr>
</tbody>
</table>

Budget reflects Notice of Award #09CH011132-05-00
Actual expenditures include posted expenditures and estimated adjustments through 04/30/2023
Administrative Cost for HS and EHS Combined 4.2%

### Agency-Wide Credit Card Report

<table>
<thead>
<tr>
<th>Description</th>
<th>CURRENT</th>
<th>1 TO 30</th>
<th>31 TO 60</th>
<th>61 TO 90</th>
<th>TOTAL</th>
<th>STATEMENT DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wells Fargo</td>
<td>34,120</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>34,120</td>
<td>5/1/2023</td>
</tr>
<tr>
<td>Lowe’s</td>
<td>7,561</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>7,561</td>
<td>5/15/2023</td>
</tr>
<tr>
<td>Smart &amp; Final</td>
<td>556</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>556</td>
<td>5/1/2023</td>
</tr>
<tr>
<td>Save Mart</td>
<td>1,454</td>
<td></td>
<td></td>
<td></td>
<td>1,454</td>
<td>5/2/2023</td>
</tr>
<tr>
<td>Chevron &amp; Texaco Business Card</td>
<td>8,540</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>8,540</td>
<td>5/6/2023</td>
</tr>
<tr>
<td>Home Depot</td>
<td>18,752</td>
<td>343</td>
<td>-</td>
<td></td>
<td>19,095</td>
<td>5/5/2023</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>70,982</td>
<td>0</td>
<td>343</td>
<td>-</td>
<td>71,326</td>
<td></td>
</tr>
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</table>
MEMORANDUM

To: Budget and Finance Committee

From: Tracy Webster, CFO / Louis Rodriguez, Finance Administrator

Date: June 21, 2023

Subject: Early Head Start
Budget to Actual Report for the period ended April 30, 2023 – Info Item

The Office of Head Start has awarded CAPK the full amount of its Head Start and Early Head Start grant for a five-year budget period, the fifth-year budget period is March 1, 2023, through February 29, 2024.

The following are highlights of the Early Head Start Budget to Actual Report for the period of March 1, 2023, through April 30, 2023. Two months (16.7%) of the 12-month budget period has elapsed.

**Base Funds**

Overall expenditures are at 11% of the budget.

**Training & Technical Assistance Funds**

Overall expenditures are at 9% of the budget.
# Community Action Partnership of Kern
## Early Head Start
### Budget to Actual Report

**Budget Period:** March 1, 2023 - February 29, 2024  
**Report Period:** March 1, 2023 - April 30, 2023  
**Month 02 of 12 (16.7%)**

Prepared 06/05/2023

<table>
<thead>
<tr>
<th>BASE FUNDS</th>
<th>BUDGET</th>
<th>ACTUAL</th>
<th>REMAINING</th>
<th>% SPENT</th>
<th>% REMAINING</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERSONNEL</td>
<td>9,313,272</td>
<td>871,391</td>
<td>8,441,881</td>
<td>9%</td>
<td>91%</td>
</tr>
<tr>
<td>FRINGE BENEFITS</td>
<td>2,737,444</td>
<td>300,840</td>
<td>2,436,604</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>859,126</td>
<td>134,045</td>
<td>725,081</td>
<td>16%</td>
<td>84%</td>
</tr>
<tr>
<td>CONTRACTUAL</td>
<td>985,671</td>
<td>130,283</td>
<td>855,388</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>CONSTRUCTION</td>
<td>-</td>
<td>1,472</td>
<td>(1,472)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTHER</td>
<td>2,024,865</td>
<td>278,515</td>
<td>1,746,350</td>
<td>14%</td>
<td>86%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>1,545,327</td>
<td>163,449</td>
<td>1,381,878</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
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**State General Child Care**
- Kern: 273,064
- SJC: 623,046
- Total: 996,110

**State Preschool**
- Kern: 5,212
- SJC: 7,596
- Total: 12,808

**State Migrant Child Care**
- Kern: 273,064
- SJC: 623,046
- Total: 996,110

**Subtotals**
- Kern: 273,064
- SJC: 623,046
- Total: 996,110

**Grand Total**
- Kern: 2,664,190
- SJC: 13,089,796
- Total: 13,753,986

CCP In-Kind
- Kern: 115,115
- SJC: 779,205

**Total**
- Kern: 2,781,305
- SJC: 13,804,996

**Grand Total**
- Kern: 2,781,305
- SJC: 13,804,996

**Subtotal**
- Kern: 2,781,305
- SJC: 13,804,996

---

https://usps.kern.edu/sites/Finance/Shared Documents/Private/Headstart/In - Kind Reports/In-Kind-2023-2024/Year to Date Combined/
## Community Action Partnership of Kern
Early Head Start Child Care Partnerships

### Non-Federal Share and In-Kind Year-to-Date Report

**Budget Period:** March 1, 2023 through February 29, 2024

**Report for period ending April 30, 2023 (Month 2 of 12)**

---

**Percent of year elapsed:** 16.67%

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**GRAND TOTAL**

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- 115,115
- 654,854
- 18%

**Budget reflects Notice of Award #03HP000163-03-05**

---

141
MEMORANDUM

To:         Budget and Finance Committee

From:      Wilfredo Cruz, Energy Program Administrator

Date:     June 21, 2023

Subject:   Agenda Item 4b: Resolution to Approve the Submission of the 2022 Department of Energy Bipartisan Infrastructure Law Weatherization Assistance (DOE BIL WAP) Contract 22P-7010 – Action Item

On June 15, 2023, the California Department of Community Services and Development (CSD) provided the Energy Program with the 2022 DOE BIL WAP contract. The $3,000,000 contract provides funding to assist qualified low-income Kern County residents with Weatherization services. This 5-year contract period is from June 1, 2023 through August 30, 2027.

The contract allows CAPK’s Energy Program to assist eligible low-income Kern County households with weatherization and energy related home repairs at no cost to the participants. This program supports the federal and state efforts to answer the concerns of rising energy prices and to assist low-income households with heating and cooling costs. The work connects to CAPK’s mission and Strategic Goal 3, advancing economic empowerment and financial stability for low-income people in the community we serve.

In order to execute this contract, a Board Resolution must be submitted with the contract package.

Recommendation:
Staff recommends that the Board of Directors approve with Resolution, the 2022 DOE BIL WAP contract number 22P-7010 and authorize the Chief Executive Officer to execute the contract and any future amendments.

Attachments:
Resolution # 2023-10
CSD 2022 DOE BIL WAP Contract #22P-7010
RESOLUTION # 2023-10

A Resolution of the Board of Directors
of Community Action Partnership of Kern
Approving the Submission of the 2022 DOE BIL WAP Contract

The Board of Directors of Community Action Partnership of Kern located at 5005 Business Park North, Bakersfield, CA 93309, met on June 28, 2023, in Bakersfield, California at a scheduled Board meeting and resolved as follows:

WHEREAS, Community Action Partnership of Kern (CAPK) is a private, non-profit 501(c)(3) corporation established as a result of the Economic Opportunity Act of 1964, and is the federally designated community action agency serving the low-income, elderly and disadvantaged residents of Kern County; and

WHEREAS, CAPK is charged with the responsibility of continuing the battle to alleviate poverty in Kern County by developing and implementing creative and innovative programs, and has adopted the philosophical position of “Helping People, Changing Lives” in its quest to assist people in need, and families with minimal or no resources; and

WHEREAS, the State of California Department of Community Services and Development has made available DOE BIL WAP funds for 2023 in the amount of $3,000,000; and

WHEREAS, the State of California Department of Community Services and Development has offered a 2022 DOE BIL WAP Contract to the CAPK; and

WHEREAS, the State of California Department of Community Services and Development requires that an authorized signatory be named for the 2022 DOE BIL WAP contract.

NOW, THEREFORE, be it resolved that the CAPK Board of Directors hereby authorizes the Chief Executive Officer to act on behalf of the Board as the Partnership’s representative signatory with regard to the submission of the 2022 DOE BIL WAP Contract and any subsequent amendments during the contract period.

APPROVED by a majority vote of the Board of Directors of Community Action Partnership of Kern, this 28th day of June 2023.

Fred Plane, Chair
CAPK Board of Directors
1. This Agreement is entered into between the Contracting Agency and the Contractor named below:

**CONTRACTING AGENCY NAME**
Department of Community Services and Development

**CONTRACTOR NAME**
Community Action Partnership of Kern

2. The term of this Agreement is: June 1, 2023 through June 30, 2027

3. The maximum amount of this Agreement is: Total $3,000,000.00

4. The parties agree to comply with the terms and conditions of the following exhibits that are by this reference made a part of the Agreement:

   - Preamble
   - Article 1 - Scope of Work
   - Article 2 - Contract Administration and Procedure
   - Article 3 - Contract Changes
   - Article 4 - Administrative Policies and Procedures
   - Article 5 - Administrative and Program Expenditures Requirement
   - Article 6 - Reporting Policies and Procedures
   - Article 7 - Program Policies and Procedures
   - Article 8 - Program Implementation
   - Article 9 - Training, Licensing, and Certifications
   - Article 10 - Compliance Policies and Procedures
   - Article 12 - General Terms and Conditions GTC 04/2017
   - Article 13 - Definitions
   - Article 14 - Table of Forms and Documents Incorporated by Reference

**IN WITNESS WHEREOF, THIS AGREEMENT HAS BEEN EXECUTED BY THE PARTIES HERETO**

**CONTRACTOR**

**CONTRACTOR NAME** (If other than an individual, state whether a corporation, partnership, etc.)
Community Action Partnership of Kern

**CONTRACTOR BUSINESS ADDRESS, CITY, STATE ZIP**
5005 Business Park North, Bakersfield, CA 93309

**PRINTED NAME OF PERSON SIGNING**

**TITLE**

**CONTRACTOR AUTHORIZED SIGNATURE**

**DATE SIGNED**

**STATE OF CALIFORNIA**

**CONTRACTING AGENCY NAME**
Department of Community Services and Development

**CONTRACTING AGENCY ADDRESS**
2389 Gateway Oaks Drive, Suite 100
Sacramento, CA 95833

**PRINTED NAME OF PERSON SIGNING**

**TITLE**

**CONTRACTING AGENCY AUTHORIZED SIGNATURE**

**DATE SIGNED**

I hereby certify that all conditions for exemption have been complied with, and the document is exempt from the Department of General Services approval.
MEMORANDUM

To: Budget and Finance Committee
From: Tracy Webster, Chief Financial Officer
Date: June 21, 2023
Subject: Agenda Item 4c: Goal 6 Strategic Plan 2021-2025 Update – Info Item

Strategic Plan Goal 6 states, “Increase fiscal health and stability of the agency to properly align resources to support clients and build capacity staff.”

The Goal 6 team has been meeting regularly to discuss the key items of Goal 6 and record progress on the described activities and indicators. The Goal 6 team continues to discuss in depth the goals and sub-goals. Furthermore, the team has outlined the action required to achieve 100% satisfaction of the goals.

Key accomplishments for Goal 6 are:

- The Finance Department continues to generate indirect funds from existing programming and develops baseline and projected targets by program. We have grown unrestricted funding capacity and have not had to pull from our line of credit since July 2020.

- Collaborate with Foundation to develop fundraising plans, informed by most pressing program/operational funding needs through case for support and fundraising tools.

- The CAPK Foundation’s Director has developed fundraising plans, is actively cultivating donors, prospecting, stewardship for long term support and working on Board development.

- The Finance Department is continuing the integration of a new software system. We have had some challenges, and we are working with a vendor for solutions. We are tentatively set to roll out by the end of the summer 2023.

Attachment:
Goal 6 Action Plan
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### 6 Fiscal Health and Stability

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TRACY WEBSTER: ACTION PLAN - ITEMS I'M CONTRIBUTING TO

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<th>PRIORITY</th>
<th>ITEMS</th>
<th>WHO</th>
<th>START DATE/ END DATE</th>
<th>EOY TARGET, MEASURE</th>
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<td>6.1.1</td>
<td>Advance implementation of position control to align staff hiring with strategic needs and financial resources of the organization and ensure effective workforce management.</td>
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<td>10/01/21</td>
<td>12/31/25</td>
<td>Percent Complete</td>
<td>70%</td>
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# BUDGET AND FINANCE COMMITTEE

## JUNE 21, 2023

### FINANCIAL REPORT

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<td>CAFB Food Access for Farmworkers Initiative</td>
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<td>Food Bank - Expansion</td>
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<td>PROGRAM SERVICES</td>
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<td>122</td>
<td>Low Income Home Energy Assistance</td>
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<td>Low Income Home Water Assistance</td>
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<td>First 5 Oasis Family Resource Center</td>
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<td>SYC - Robotics/STEM</td>
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<td>FHCC - Aggression Replacement Training</td>
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<td>FHCC - KHS Museum on the Move</td>
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<td>County of Kern LBNC - Safe Camping</td>
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<td>HUD Coordinated Entry System</td>
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<td>County of Kern LBNC</td>
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<td>276</td>
<td>BKRHC HHAP</td>
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<td>186</td>
<td>2-1-1 Hospital Preparedness Program</td>
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<td>United Way - COVID-19 Comm Resp &amp; Relief</td>
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<td>536-231</td>
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<td>536-260</td>
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<td>151</td>
<td>ASTHO Vaccine Equity</td>
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<tr>
<td>205</td>
<td>BCSD Community School Partnership Program</td>
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</table>
Note 1: Line of Credit agreement was entered into with Wells Fargo Bank as of January 15, 2023 for $1.5 million during January, February, July, August 2023 and will decrease to $350,000 during March - June 2023, Sept - Dec 2023. This agreement will terminate on January 15, 2024.
A varied amount decrease to better manage the cash flow need during peak months.

Note 3: The interest expense and commitment fee are automatically deducted from CAPK's operating bank account at Wells Fargo Bank.
<table>
<thead>
<tr>
<th>PROGRAM (FUND)</th>
<th>CASH BALANCE</th>
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<tbody>
<tr>
<td>CHILD AND ADULT CARE FOOD PROGRAM</td>
<td>(185,428.76)</td>
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<td>GENERAL CHILD CARE</td>
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<td>MIGRANT A/P</td>
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<td>Child Development Reserve Fund No. 1</td>
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<td>Child Development Reserve Fund No. 2</td>
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<td>EF&amp;S</td>
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<td>CAL FRESH</td>
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<td>CALETC</td>
<td>(207,168.07)</td>
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<td>CAPK FOUNDATION</td>
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<td>COST POOLS</td>
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<td>COUNTY OF KERN LOW BARRIER HOMELESS CENTER</td>
<td>(320,799.89)</td>
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<td>CSBG - DISCRETIONARY</td>
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<td>HOMELESS SAFE CAMPING - CSLRFR (ARPA)</td>
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<td>ESG COORDINATED ENTRY SERVICE - COVID19</td>
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<td>ASTHO VACCINE EQUITY</td>
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<td>FIRST 5 KERN 211</td>
<td>(12,864.73)</td>
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<td>FIRST 5 KERN EAST KERN FAMILY RESOURCE CENTER</td>
<td>(38,642.04)</td>
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<td>FIRST 5 HELP ME GROW</td>
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<td>FIRST 5 RIDGECREST FAMILY RESOURCE CENTER</td>
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<tr>
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<td><strong>SUBTOTAL</strong></td>
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<td><strong>TOTAL OPERATING CASH</strong></td>
<td><strong>7,357,398.84</strong></td>
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COMMUNITY ACTION PARTNERSHIP OF KERN (CAPK)

WELLS FARGO BANK ACCOUNTS

1. Operating Account: Used to make all CAPK disbursements and for deposits of all cash receipts unless there are requirements to deposit cash to a restricted bank account.

2. Head Start Accrued Vacation: This is an interest bearing restricted bank account that holds cash reserved for the payment of accrued vacation for Head Start and Early Head Start employees.

3. CSD Advances Account: This is an interest bearing restricted bank account for CSBG and Energy grants. Advances on the Community Services Block Grant (CSBG), Department of Energy – Weatherization Assistance Program (DOE WAP) and Low Income Home Energy Assistance Program (LIHEAP) grants are required to be deposited to a restricted bank account until there is an immediate need for the cash. Once the immediate need is determined, the cash is transferred to the Operating Account to make disbursements.

4. On-Line Donations Account: This is an interest bearing restricted bank account that is designated for internet donations to CAPK. The deposits are subsequently transferred to the Operating Account.

5. Child Development Reserve #1: This is an interest bearing restricted bank account that is required by the California Department of Education for center-based contracts, such as General Child Care (CCTR), State Preschool (CSPP) and State Migrant (CMIG) for the purpose of holding revenue earned in excess of costs. When the revenue is used, the cash is transferred to the Operating Account to make disbursements.

6. Child Development Reserve #2: This is an interest bearing restricted bank account that is required by the California Department of Education for alternative payment contracts, such as Migrant Childcare Alternative Payment (CMAP) for the purpose of holding revenue earned in excess of costs. When the revenue is used, the cash is transferred to the Operating Account to make disbursements.

Note: All CAPK bank accounts are with Wells Fargo Bank.
# Bank Reconciliation for the Month Ended

## Operating Account

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<tr>
<th>Date</th>
<th>Description</th>
<th>Amount</th>
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<td>04/30/23</td>
<td>Adjusted Bank Balance at 04/30/23</td>
<td>$7,360,207.68</td>
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<tr>
<td>03/31/23</td>
<td>General Ledger Balance at 03/31/23</td>
<td>$13,590,169.87</td>
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<td>04/07/23</td>
<td>ADP Payroll 4/07/23</td>
<td>$1,611,213.26</td>
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<tr>
<td>04/21/23</td>
<td>ADP Payroll 4/21/23</td>
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<tr>
<td>04/30/23</td>
<td>General Ledger Balance at 04/30/23</td>
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<tr>
<td>05/04/23</td>
<td>Difference at 05/04/23</td>
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</tbody>
</table>

## Adjusted Bank Balance at 04/30/23

- **Less: Outstanding Checks**: $683,609.35

## Adjusted Bank Balance at 04/30/23

- **Add: Deposits**
  - US Treas Drawdowns: $819,526.17
  - Funds from Other Grants: $1,388,968.77
  - Transfers from Restricted Accounts: $150,000.00
  - ADP/Health Equity Refund: $0.00
  - Reimbursement of Altered Payee: $0.00

- **Less: Checks**
  - ADP Payroll 4/07/23: $1,611,213.26
  - ADP Payroll 4/21/23: $1,612,491.69
  - EFTs for HRA/HSA/STD/403B: $244,810.38
  - Rec Loan Principal/Int Expenses: $23,790.70
  - Transfers from Restricted Accounts: $0.00
  - Credit Card: $27,075.67
  - Bank Fees: $0.00
  - ACH Vouchers: $3,016,114.92

## General Ledger Balance at 04/30/23

- **Add: General Ledger Balance at 04/30/23**: $7,360,207.68

## Differences

- **Difference**: $0.00

---

Prepared by: Naomi Ibarra  
Title: Accountant  
Date: 05/04/2023

Approved by: Mary privilege  
Title: Chief Financial Officer  
Date: May 4, 2023
COMMUNITY ACTION PARTNERSHIP OF KERN
HEADSTART ACCRUED VACATION
5005 BUSINESS PARK NORTH
BAKERSFIELD, CA 93309-1651

BANK RECONCILIATION FOR MONTH ENDING
April 30, 2023

WELLS FARGO BANK, N.A.
P. O. BOX 63020
SAN FRANCISCO, CA 94163

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<th>Bank Balance Ending: 04/30/23</th>
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<td>Adjusted Bank Balance: 04/30/23</td>
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<table>
<thead>
<tr>
<th>Balance Per G/L 03/31/23</th>
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<td>Interest</td>
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<td>Bank Account Transfer From General Fund</td>
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<td>Less:</td>
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<tr>
<td>Checks</td>
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<tr>
<td>Bank Account Transfer To General Fund</td>
<td>0.00</td>
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</table>

| Balance Per G/L 04/30/23 | 993,700.74 |

Diference: 0.00

* This account changed name in March 2011 from "Discretionary Fund" to "Head Start Accrued Vacation".

Prepared By: Naomi Ibarra
Title: Accountant
Date: 05/04/23

Approved By:
Title: Chief Financial Officer
Date: May 4, 2023
BANK RECONCILIATION FOR MONTH ENDING
April 30, 2023

WELLS FARGO BANK, N.A.
P. O. BOX 63020
SAN FRANCISCO, CA 94163

ACCOUNT NO.: XXXX-X1095

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<tr>
<td>04/30/23</td>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
</tr>
<tr>
<td>04/30/23</td>
<td>OTHER</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td><strong>ADJUSTED BANK BALANCE:</strong></td>
<td><strong>687,279.13</strong></td>
</tr>
</tbody>
</table>

<table>
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<th>DESCRIPTION</th>
<th>AMOUNT</th>
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<td>03/31/23</td>
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<td></td>
<td>LESS: CHECKS</td>
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<td></td>
<td>CLIENT ANALYSIS SERVICE CHARGE</td>
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<td>WIRE TRANSFER</td>
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* December 2009 name changed from Food Bank to DOE ARRA.
** January 2018 name changed from DOE ARRA to CSD Advances.

DIFFERENCE: 0.00

PREPARED BY: Naomi Ibarra  TITLE: Accountant  DATE: 05/12/23

APPROVED BY:  TITLE: Chief Financial Officer  DATE: May 12, 2023
**COMMUNITY ACTION PARTNERSHIP OF KERN**  
**ON-LINE DONATIONS ACCOUNT**  
5005 BUSINESS PARK NORTH  
BAKERSFIELD, CA 93309-1651  

**WELLS FARGO BANK, N.A.**  
P. O. BOX 63021  
SAN FRANCISCO, CA 94163  

---  

**ACCOUNT NO.: XXXXX-X1921**  

---  

**BANK RECONCILIATION FOR MONTH ENDING**  
**April 30, 2023**  

---  

**WELLS FARGO BANK, N.A.**  
P. O. BOX 63021  
SAN FRANCISCO, CA 94163

---  

**BANK BALANCE ENDING: 04/30/23**  

<table>
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<tr>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>DEPOSITS IN TRANSIT</td>
<td>0.00</td>
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<tr>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
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<tr>
<td>OTHER</td>
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**ADJUSTED BANK BALANCE 04/30/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPOSITS IN TRANSIT</td>
<td>0.00</td>
</tr>
<tr>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
</tr>
<tr>
<td>OTHER</td>
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</tr>
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**BALANCE PER GENERAL LEDGER 03/31/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADD:</td>
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</tr>
<tr>
<td>DEPOSITS (Credit Card Donations &amp; Shared Fee)</td>
<td>0.00</td>
</tr>
<tr>
<td>ONLINE DONATIONS</td>
<td>442.90</td>
</tr>
<tr>
<td>PAYPAL DEPOSIT</td>
<td>0.00</td>
</tr>
<tr>
<td>INTEREST</td>
<td>44.77</td>
</tr>
<tr>
<td>LESS:</td>
<td>0.00</td>
</tr>
<tr>
<td>APPLIED MERCHANT DEBITS</td>
<td>0.00</td>
</tr>
<tr>
<td>CLIENT ANALYSIS SERVICE CHARGE</td>
<td>17.45</td>
</tr>
<tr>
<td>BANKCARD FEES</td>
<td>24.91</td>
</tr>
<tr>
<td>CASH CONCENTRATION FEE</td>
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</tr>
<tr>
<td>FUND TRANSFER TO GENERAL FUND</td>
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**Balance per General Ledger: 04/30/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADD:</td>
<td>0.00</td>
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<tr>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
</tr>
<tr>
<td>OTHER</td>
<td>0.00</td>
</tr>
</tbody>
</table>

---  

* October 2009 name changed from WIC Account to CSBG ARRA Account and is now interest-bearing.  
** August 2010 name changed from CSBG ARRA Account to HOPE Program Account.  
*** January 2018 name changed from HOPE Program Account to On-line Donations Account.  

**PREPARED BY:** Naomi Ibarra  
**TITLE:** Accountant  
**DATE:** 05/10/23

**APPROVED BY:**  
**TITLE:** Chief Financial Officer  
**DATE:** May 11, 2023

---  

**BANK RECONCILIATION FOR MONTH ENDING**  
**April 30, 2023**  

---  

**ACCOUNT NO.: XXXXX-X1921**  

---  

**BANK BALANCE ENDING: 04/30/23**  

<table>
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<tbody>
<tr>
<td>DEPOSITS IN TRANSIT</td>
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<tr>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
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<tr>
<td>OTHER</td>
<td>0.00</td>
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**ADJUSTED BANK BALANCE 04/30/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPOSITS IN TRANSIT</td>
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</tr>
<tr>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
</tr>
<tr>
<td>OTHER</td>
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**BALANCE PER GENERAL LEDGER 03/31/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>ADD:</td>
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<tr>
<td>INTEREST</td>
<td>44.77</td>
</tr>
<tr>
<td>LESS:</td>
<td>0.00</td>
</tr>
<tr>
<td>APPLIED MERCHANT DEBITS</td>
<td>0.00</td>
</tr>
<tr>
<td>CLIENT ANALYSIS SERVICE CHARGE</td>
<td>17.45</td>
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<td>24.91</td>
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<td>FUND TRANSFER TO GENERAL FUND</td>
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**Balance per General Ledger: 04/30/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
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<tr>
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<td>0.00</td>
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<tr>
<td>OUTSTANDING CHECKS</td>
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<td>OTHER</td>
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</table>

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** August 2010 name changed from CSBG ARRA Account to HOPE Program Account.  
*** January 2018 name changed from HOPE Program Account to On-line Donations Account.  

**PREPARED BY:** Naomi Ibarra  
**TITLE:** Accountant  
**DATE:** 05/10/23

**APPROVED BY:**  
**TITLE:** Chief Financial Officer  
**DATE:** May 11, 2023

---  

**BANK RECONCILIATION FOR MONTH ENDING**  
**April 30, 2023**  

---  

**ACCOUNT NO.: XXXXX-X1921**  

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**BANK BALANCE ENDING: 04/30/23**  

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<tr>
<th>Description</th>
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<tbody>
<tr>
<td>DEPOSITS IN TRANSIT</td>
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<tr>
<td>OUTSTANDING CHECKS</td>
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**ADJUSTED BANK BALANCE 04/30/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>DEPOSITS IN TRANSIT</td>
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<tr>
<td>OUTSTANDING CHECKS</td>
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<td>OTHER</td>
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**BALANCE PER GENERAL LEDGER 03/31/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADD:</td>
<td>0.00</td>
</tr>
<tr>
<td>DEPOSITS (Credit Card Donations &amp; Shared Fee)</td>
<td>0.00</td>
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<td>442.90</td>
</tr>
<tr>
<td>PAYPAL DEPOSIT</td>
<td>0.00</td>
</tr>
<tr>
<td>INTEREST</td>
<td>44.77</td>
</tr>
<tr>
<td>LESS:</td>
<td>0.00</td>
</tr>
<tr>
<td>APPLIED MERCHANT DEBITS</td>
<td>0.00</td>
</tr>
<tr>
<td>CLIENT ANALYSIS SERVICE CHARGE</td>
<td>17.45</td>
</tr>
<tr>
<td>BANKCARD FEES</td>
<td>24.91</td>
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<tr>
<td>FUND TRANSFER TO GENERAL FUND</td>
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**Balance per General Ledger: 04/30/23**  

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>ADD:</td>
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</tr>
<tr>
<td>DEPOSITS IN TRANSIT</td>
<td>0.00</td>
</tr>
<tr>
<td>OUTSTANDING CHECKS</td>
<td>0.00</td>
</tr>
<tr>
<td>OTHER</td>
<td>0.00</td>
</tr>
</tbody>
</table>

---  

* October 2009 name changed from WIC Account to CSBG ARRA Account and is now interest-bearing.  
** August 2010 name changed from CSBG ARRA Account to HOPE Program Account.  
*** January 2018 name changed from HOPE Program Account to On-line Donations Account.  

**PREPARED BY:** Naomi Ibarra  
**TITLE:** Accountant  
**DATE:** 05/10/23

**APPROVED BY:**  
**TITLE:** Chief Financial Officer  
**DATE:** May 11, 2023
BANK RECONCILIATION FOR MONTH ENDING  
April 30, 2023

WELLS FARGO BANK, N.A.  
P. O. BOX 63020  
SAN FRANCISCO, CA 94163  

ACCOUNT NO.: XXXX-X6264

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<table>
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<td><strong>Balance Per G/L 04/30/23</strong></td>
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DIFERENCE: 0.00

Prepared By: N. Ibarra  
Title: Accountant  
Date: 05/04/23

Approved By:  
Title: Chief Financial Officer  
Date: May 4, 2023
## BANK RECONCILIATION FOR MONTH ENDING
### April 30, 2023

### WELLS FARGO BANK, N.A.
P. O. BOX 63020
SAN FRANCISCO, CA 94163

**ACCOUNT NO.: XXXX-X2049**

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### BALANCE PER G/L

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<td><strong>LESS:</strong></td>
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<tr>
<td>CHECKS</td>
<td>0.00</td>
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<tr>
<td>CLIENT ANALYSIS SERVICE CHARGE</td>
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</tr>
<tr>
<td>BANK ACCOUNT TRANSFER TO GENERAL FUND</td>
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<tr>
<td><strong>BALANCE PER G/L:</strong></td>
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<td>35,243.89</td>
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**DIFERENCE:** 0.00

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**PREPARED BY:** Naomi Ibarra  
**TITLE:** Accountant  
**DATE:** 05/10/23

**APPROVED BY:**  
**TITLE:** Chief Financial Officer  
**DATE:** May 11, 2023
<table>
<thead>
<tr>
<th>Cardholder</th>
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<th>Amount Charged</th>
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<tbody>
<tr>
<td>CAPK</td>
<td>Accounts Payable</td>
<td>$</td>
</tr>
<tr>
<td>Catherine Anspach</td>
<td>Foundation Director of Development</td>
<td>66.91</td>
</tr>
<tr>
<td>Gloria Barbero</td>
<td>Administrator - EHS San Joaquin</td>
<td></td>
</tr>
<tr>
<td>Yolanda Gonzales</td>
<td>Director of Head Start/State Child Development Programs</td>
<td>14.99</td>
</tr>
<tr>
<td>Freddy Hernandez</td>
<td>Director of Youth and Community Services</td>
<td>9,988.99</td>
</tr>
<tr>
<td>Louis Gill</td>
<td>Chief Program Officer</td>
<td>6,577.88</td>
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<tr>
<td>Lisa McGranahan</td>
<td>Director of Human Resources</td>
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<tr>
<td>Jerry Meade</td>
<td>Assistant Director of Head Start/State Child Development Programs</td>
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</tr>
<tr>
<td>Pritika Ram</td>
<td>Chief Business Development Officer</td>
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<tr>
<td>Jeremy Tobias</td>
<td>Chief Executive Officer</td>
<td>3,220.57</td>
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<tr>
<td>Emilio Wagner</td>
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<tr>
<td>Tracy Webster</td>
<td>Chief Financial Officer</td>
<td>1,378.03</td>
</tr>
<tr>
<td>Rebecca Moreno</td>
<td>Director of Housing Support Services</td>
<td>2,862.00</td>
</tr>
<tr>
<td>Susana Magana</td>
<td>Director of Nutrition Services</td>
<td>2,029.67</td>
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<tr>
<td><strong>Total</strong></td>
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<td><strong>34,119.59</strong></td>
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# Statement Summary

**Name**: Capk Ap  
**Account #**: XXXX-XXXX-XXXX-7017  
**Reporting Period**: 4/1/2023 - 4/28/2023

<table>
<thead>
<tr>
<th>Trans Date</th>
<th>Post Date</th>
<th>Merchant Name</th>
<th>Charge Codes</th>
<th>Approved</th>
<th>Receipt</th>
<th>Amount</th>
</tr>
</thead>
</table>

Transaction Count: 0  
Total: 0.00

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Employee Signature  
**Date**

Authorized Approver Signature  
**Date**
# Statement Summary

**Name**: Catherine Anspach  
**Account #**: XXXX-XXXX-XXXX-1647  
**Company**: Community Action Partnership O  
**Currency**: US Dollar  
**Reporting Period**: 4/1/2023 - 4/28/2023

<table>
<thead>
<tr>
<th>Trans Date</th>
<th>Post Date</th>
<th>Merchant Name</th>
<th>Charge Codes</th>
<th>Approved</th>
<th>Receipt</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>4/14/2023</td>
<td>4/17/2023</td>
<td>Eureka Bakersfield</td>
<td></td>
<td></td>
<td></td>
<td>66.91</td>
</tr>
<tr>
<td></td>
<td></td>
<td>424-2694705, CA</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Lunch meeting with Board Vice Chair, A. Joven, to discuss Board Developments

Transaction Count: 1  
Total: 66.91

**Employee Signature**  
**Date**  

**Authorized Approver Signature**  
**Date**
# Statement Summary

**Name**: Gloria Barbero  
**Account #**: XXXX-XXXX-XXXX-7058  
**Reporting Period**: 4/1/2023 - 4/28/2023  
**Company**: Community Action Partnership O  
**Currency**: US Dollar  

<table>
<thead>
<tr>
<th>Trans Date</th>
<th>Post Date</th>
<th>Merchant Name</th>
<th>Charge Codes</th>
<th>Approved</th>
<th>Receipt</th>
<th>Amount</th>
</tr>
</thead>
</table>

Transaction Count: 0  
Total: 0.00

**Employee Signature**  
**Date**  

**Authorized Approver Signature**  
**Date**
### Statement Summary

**Name**: Yolanda Gonzales  
**Account #**: XXXX-XXXX-XXXX-7009  
**Company**: Community Action Partnership O  
**Currency**: US Dollar  
**Reporting Period**: 4/1/2023 - 4/28/2023

<table>
<thead>
<tr>
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| Credit Voucher American AI  
Travel-- AA flight refund-- NHSA Annual Conference, Phoenix- Yolanda G. 108@17%=2.38/109@68%=9.53/117@15%=2.10 |

| 2 4/21/2023 | 4/24/2023  | Paypal            |              |          |         | 29.00  |
|            |           | 402-935-7733, VA  |              |          |         |        |
| Purchase Paypal  
Registration for Pyramid Model Registration- Maria Diaz- 270@100=$29.00 |

**Transaction Count**: 2  
**Total**: 14.99

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**Employee Signature**  
**Date**  
**Authorized Approver Signature**  
**Date**

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Account Page No 1
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Hotel for Jayshree Madeka to attend the Latino Tax Fest in Las Vegas.

Lunch for VITA volunteers.

Registration for Jayshree Madeka to attend the Latino Tax Fest in Las Vegas.

Lunch for VITA volunteers.

Lunch for VITA volunteers.

Lunch for VITA volunteers.
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<td>Registration for Lois Hannible, Jessica Reyes Gonzalez, and Nhuxuan (Stacy) Lai to attend the Adverse Childhood Experiences conference at the Marriott Bakersfield.</td>
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<td>Registration Fees for Eric Le Barbe and Ada Harpster to attend the Kern County ACE's Conference on 5/17/23. 2 registration fees at $28.52 each = $57.04 total.</td>
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Transaction Count: 20
Total: 9,988.99
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<td>Registration for Abran Gonzalez to attend the Wipfli Stronger to Serve conference in Las Vegas.</td>
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<td>Registration for Andrea Chavez to attend the Latino Tax Fest in Las Vegas.</td>
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<td>Hotel Fee for Freddy Hernandez (plus parking fees for 2 nights) for the CalCAPA Legislative Day from 4/17/23 - 4/19/23.</td>
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### Transaction Count: 2

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Transaction Count: 0

Total: 0.00

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<td>Mrs Fields Gifts</td>
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<td>Thank you cookie basket to staff at Serenity Homes Family Tiny Homes. CAPK staff toured facility on 4/7/23.</td>
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<td>201.82</td>
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<td>Hotel deposit for Savannah Maldonado for Wipfli Conference in Las Vegas in July 2023</td>
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<td>Lunch for Shafter Community Engagement Meeting on April 13, 2023. Agenda and sign-in sheet are attached.</td>
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<td>Wipfli Conference Registration for Catherine Anspach (her credit card had a $1,000 limit). Wipfli Conference is in Las Vegas in July, 2023.</td>
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<td>Office Depot #952 800-463-3768, CA</td>
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<td>Power Cord needed urgently for Community Development for IT to set up computer for new person. (See attached notes)</td>
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<td>Grant Station Com 877-784-7268, MN</td>
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<td>Registration fee for virtual training sessions for Bradley (Ryan) Fergon.</td>
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<td>14 4/19/2023 4/21/2023</td>
<td>The Citizen Marriott Sacramento, CA</td>
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<td></td>
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<td>508.94</td>
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<td>Hotel fee for Savannah Maldonado for Legislative Day in Sacramento April 17-19, 2023.</td>
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<td>Facebook Ad. Join us Thursday, April 13th &amp; Save the Date.</td>
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<td>16 4/27/2023 4/28/2023</td>
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<td>Applied Leadership Graduation Stoles for CAPK graduates. Vendor does not accept payment by check (see attached notes).</td>
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Transaction Count: 16
Total: **5,986.82**
**Statement Summary**

**Name**  
Jeremy Tobias

**Account #**  
XXXX-XXXX-XXXX-7066

**Company**  
Community Action Partnership O

**Currency**  
US Dollar

**Reporting Period**  
4/1/2023 - 4/28/2023

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<td>Registration fee for Board Member Michelle Jara-Rangel to attend virtual workshop &quot;History of the War on Poverty &amp; CAP&quot;</td>
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<td>Gasoline for CEO's Agency Vehicle.</td>
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<td>3 4/12/2023</td>
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<td>Hotel fee for Jeremy Tobias to attend CalCAPA Legislative Day events &amp; CalCAPA Board Meeting in Sacramento, 4-17 to 4-19 2023</td>
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<td>Gasoline for CEO's Agency Vehicle</td>
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<td>Monthly Car Wash Fee for CEO's Agency Vehicle</td>
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<td>Registration Fee for Board Member Michelle Jara-Rangel to attend CAPLAW Conference in Austin, TX in June, 2023</td>
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<td>10 4/25/2023</td>
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<tr>
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<td></td>
<td>Airline Ticket for Michelle Jara-Rangel to attend CAPLAW Conference in Austin, TX in June, 2023</td>
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<tr>
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<td>Lunch for Board of Directors Meeting on April 26, 2023</td>
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<td>Authorized Approver Signature</td>
<td>Date</td>
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Transaction Count: 11
Total: 3,220.57
## Statement Summary

**Name:** Emilio Wagner  
**Account #:** XXXX-XXXX-XXXX-7041  
**Company:** Community Action Partnership O  
**Currency:** US Dollar

### Reporting Period: 4/1/2023 - 4/28/2023

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<td>Microsoft Azure - Software Support HS</td>
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<td>2 4/20/2023</td>
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<td>Mindbody</td>
<td>805-5462000, CA</td>
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<td>Mindbody- Premiere Basic April 2023</td>
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**Total: 1,837.53**

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**Employee Signature**  
**Date**  
**Authorized Approver Signature**  
**Date**
# Statement Summary

**Name:** Tracy Webster  
**Account #:** XXXX-XXXX-XXXX-6993  
**Company:** Community Action Partnership O  
**Currency:** US Dollar  
**Reporting Period:** 4/1/2023 - 4/28/2023

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<td>1 4/4/2023</td>
<td>4/6/2023</td>
<td>Wipfli Llp Madison, WI</td>
<td>OMB’S Uniform Guidance for Martin Goni</td>
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<td>925.00</td>
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<td>2 4/14/2023</td>
<td>4/17/2023</td>
<td>Urbane Cafe Bakersfield Bakersfield, CA</td>
<td>Lunch for Budget and Finance Committee Meeting</td>
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<td>3 4/21/2023</td>
<td>4/21/2023</td>
<td>Panera Bread #601790 O 661-395-9300, CA</td>
<td>Catering for Audit and Pension Committee Meeting</td>
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**Transaction Count:** 4  
**Total:** 1,378.03

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**Employee Signature**  
**Date**

**Authorized Approver Signature**  
**Date**
### Statement Summary

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#### Reporting Period: 4/1/2023 - 4/28/2023

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<td>4/12/2023</td>
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<td>Wpy*bitfocus 855-999-3729, CA</td>
<td>Registration for Joseph Aguilar to attend the Clarity Connect conference in Las Vegas.</td>
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<td>4/12/2023</td>
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<td>Wpy*bitfocus 855-999-3729, CA</td>
<td>Registration for Rebecca Moreno to attend the Clarity Connect conference in Las Vegas.</td>
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<td>4/17/2023</td>
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<td>Travelodge Bakersfield, CA</td>
<td>Hotel fee for M Street Navigation Center Client to quarantine.</td>
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Transaction Count: 3

Total: 2,862.00
# Statement Summary

**Name**: Susana Magana  
**Account #**: XXXX-XXXX-XXXX-6693  
**Company**: Community Action Partnership O  
**Currency**: US Dollar  
**Reporting Period**: 4/1/2023 - 4/28/2023

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<td>Cvs/Pharmacy #09878 Bakersfield, CA</td>
<td>Purchase of special formula for Central Kitchen.</td>
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<td>Albertsons #3172</td>
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<td>Purchase of special formula for Central Kitchen.</td>
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<td>Airline Ticket for Kelly Lowery to return to Bakersfield from New Orleans. Original return flight was canceled.</td>
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<td>Special Diet Milk for Central Kitchen.</td>
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<td>4/24/2023</td>
<td>Bakersfield, CA</td>
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<td></td>
<td></td>
<td>Special Diet Food for Central Kitchen.</td>
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<td>10</td>
<td>4/25/2023</td>
<td>Sp Ener-G</td>
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<td>Special Diet food online purchase.</td>
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Transaction Count: 10
Total: 2,029.67

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<tr>
<th>Employee Signature</th>
<th>Date</th>
<th>Authorized Approver Signature</th>
<th>Date</th>
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</table>
## COMMUNITY ACTION PARTNERSHIP OF KERN
### CENTRAL KITCHEN - BUDGET TO ACTUAL
#### FOR THE PERIOD MARCH 1, 2023 TO FEBRUARY 28, 2024 (2 OF 12 MONTHS OR 16.66%)

<table>
<thead>
<tr>
<th>Line Item</th>
<th>2023/24 Budget</th>
<th>3/1/23 - 2/28/24 Actual</th>
<th>% Expended</th>
<th>Available Budget</th>
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<tbody>
<tr>
<td>USDA Revenue (Note A)</td>
<td>2,098,319</td>
<td>248,129</td>
<td>11.8%</td>
<td>1,850,190</td>
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<tr>
<td>Head Start Subsidy</td>
<td>1,213,057</td>
<td>144,736</td>
<td>11.9%</td>
<td>1,068,321</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>3,311,376</strong></td>
<td><strong>392,865</strong></td>
<td><strong>11.9%</strong></td>
<td><strong>2,918,511</strong></td>
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<tr>
<td><strong>Expenditures (Note B)</strong></td>
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<td></td>
<td></td>
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<tr>
<td>Salaries</td>
<td>843,039</td>
<td>87,227</td>
<td>10.3%</td>
<td>755,812</td>
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<td>Benefits</td>
<td>258,634</td>
<td>29,632</td>
<td>11.5%</td>
<td>229,002</td>
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<tr>
<td>Vehicle Gasoline, Repair/Maintenance</td>
<td>47,000</td>
<td>(1,209)</td>
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<td>48,209</td>
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<td>Space Costs</td>
<td>121,700</td>
<td>14,192</td>
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<td>Supplies - Office &amp; Food Service</td>
<td>106,000</td>
<td>26,952</td>
<td>25.4%</td>
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<tr>
<td>Equipment Repair/Maintenance &amp; Lease</td>
<td>35,300</td>
<td>8,334</td>
<td>23.6%</td>
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<td>Communication</td>
<td>13,000</td>
<td>2,142</td>
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<td>Risk Insurance</td>
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<td>Printing</td>
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<td>Hiring &amp; Employee Costs</td>
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<td>First Aid</td>
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<td>Raw Food/Vended Meals</td>
<td>1,552,853</td>
<td>172,472</td>
<td>11.1%</td>
<td>1,380,381</td>
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<td><strong>Sub Total</strong></td>
<td><strong>2,991,826</strong></td>
<td><strong>342,786</strong></td>
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<td><strong>2,649,040</strong></td>
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<tr>
<td>Adult Meals Prepared</td>
<td>128,794</td>
<td>28,495</td>
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<td><strong>Indirect</strong></td>
<td><strong>190,756</strong></td>
<td><strong>21,584</strong></td>
<td><strong>11.3%</strong></td>
<td><strong>169,172</strong></td>
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<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>3,311,376</strong></td>
<td><strong>392,865</strong></td>
<td><strong>11.9%</strong></td>
<td><strong>2,918,511</strong></td>
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<tr>
<th>Prior Period</th>
<th>April 2023</th>
<th>Cumulative</th>
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<td>Total Meals Prepared and Vended (Note C)</td>
<td>72,469</td>
<td>58,338</td>
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<td>Total Meals Claimed</td>
<td>47,835</td>
<td>37,066</td>
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<td>Difference</td>
<td>24,634</td>
<td>21,272</td>
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Percentage Claimed to Prepared/Vended: 63.5% 64.9%

**Note A:** Source of USDA revenue is monthly report submitted to California Department of Education by Head Start/State Child Development Program Division. Revenue is reimbursement for meals claimed.

**Note B:** Expenditures are for meals prepared, including vended meals.

**Note C:** Total number of meals delivered to the centers and homebase excluding adult prepared and adult meals vended. The total represents the number of meals available to be served to center and homebase children.
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<tbody>
<tr>
<td>Provider Payments</td>
<td>$613,374</td>
<td>$813,746</td>
<td>$954,574</td>
<td>$1,241,372</td>
<td>$1,990,336</td>
<td>$1,702,027</td>
<td>$1,657,255</td>
<td>$1,581,140</td>
<td>$1,835,421</td>
<td>$2,091,284</td>
<td>-</td>
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<td>$14,480,530</td>
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<td>Add: Family Fees</td>
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<tr>
<td>Net Provider Payments</td>
<td>$613,374</td>
<td>$813,746</td>
<td>$954,574</td>
<td>$1,241,372</td>
<td>$1,990,336</td>
<td>$1,702,027</td>
<td>$1,657,255</td>
<td>$1,581,140</td>
<td>$1,835,421</td>
<td>$2,091,284</td>
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<td>-</td>
<td>$14,480,530</td>
<td>80.79%</td>
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<td>Administration &amp; Support Services Revenue</td>
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<td>Provider Payments</td>
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<td>$954,574</td>
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<td>$1,657,255</td>
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<td>$1,835,421</td>
<td>$2,091,284</td>
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<td>-</td>
<td>$14,480,530</td>
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<tr>
<td>Reimbursement Rate</td>
<td>x 26.5823%</td>
<td>x 26.5823%</td>
<td>x 26.5823%</td>
<td>x 26.5823%</td>
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<td>x 26.5823%</td>
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<tr>
<td>Revenue Earned</td>
<td>$163,049</td>
<td>$216,312</td>
<td>$263,748</td>
<td>$329,985</td>
<td>$529,077</td>
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<td>$440,536</td>
<td>$420,303</td>
<td>$487,892</td>
<td>$555,911</td>
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<td>$1,847,910</td>
<td>10.31%</td>
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<tr>
<td>Program Administration/Support Services Costs</td>
<td>101,870</td>
<td>115,425</td>
<td>139,282</td>
<td>139,997</td>
<td>144,668</td>
<td>246,553</td>
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<td>Indirect (10% x MTDC) Costs</td>
<td>70,328</td>
<td>91,770</td>
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<td>212,318</td>
<td>181,372</td>
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<tr>
<td>Total Operating Costs</td>
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<td>$207,199</td>
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<td>$430,318</td>
<td>$471,584</td>
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<td>Revenue Earned Over/(Under) Costs</td>
<td>$(9,150)</td>
<td>$(9,113)</td>
<td>$(6,450)</td>
<td>$(53,044)</td>
<td>(172,091)</td>
<td>$(12,310)</td>
<td>$(90,318)</td>
<td>$(51,280)</td>
<td>$(4,606)</td>
<td>$(128,463)</td>
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<td>$(406,753)</td>
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<td>TOTAL COSTS - NET OF FAMILY FEES</td>
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<td>$2,518,733</td>
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<td>$17,923,035</td>
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</table>

Note 1: Administration and Support Services revenue is earned based on the amount of provider payments incurred. Example:

Provider payments 14,480,530
Reimbursement Rate (19% / 81%) x 26.5823%
Revenue Earned 3,849,258

Note 2: The maximum reimbursable amount per the 2022/23 State contract is as follows:

Provider Payments 23,857,165 81.00%
Administration 4,712,526 16.00%
Support Services 883,599 3.00%
Maximum Reimburseable Amount (MRA) 29,453,290 100.00%

Note 3: Increase to contract was received December 2022 in the amount of $2,031,428.
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<tr>
<td>Adjusted Days of Enrollment - Certified</td>
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<td>4,970</td>
<td>4,923</td>
<td>5,701</td>
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<td>5,468</td>
<td>5,408</td>
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<td>$ 51.55</td>
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<td>$ 51.55</td>
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<tr>
<td>Revenue Earned</td>
<td>$ 177,255</td>
<td>$ 216,191</td>
<td>$ 253,771</td>
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<td><strong>Maximum Percentage Rate (MRA)</strong></td>
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<tr>
<td>Revenue Earned</td>
<td>$ 382,183</td>
<td>$ 394,618</td>
<td>$ 413,749</td>
<td>$ 526,385</td>
<td>$ 492,046</td>
<td>$ 443,829</td>
<td>$ 528,936</td>
<td>$ 500,902</td>
<td>$ 423,046</td>
<td>$ 315,000</td>
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<tr>
<td>Revenue Earned</td>
<td>$ 182,183</td>
<td>$ 394,618</td>
<td>$ 413,749</td>
<td>$ 526,385</td>
<td>$ 492,046</td>
<td>$ 443,829</td>
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<td><strong>MIGRANT CHILD CARE (CMIG-2004)</strong></td>
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<td>-</td>
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<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>98.83%</td>
<td>98.30%</td>
<td>96.24%</td>
<td>96.41%</td>
<td>91.67%</td>
<td>97.79%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>98.17%</td>
</tr>
<tr>
<td>Maximum Reimbursable Amount (MRA)</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
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<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Note 1: Source of adjusted days of enrollment for certified children is the monthly attendance report prepared by the Fiscal Dept. of the Head Start/State Child Development Division.

Note 2: Source of reimbursement rate per child per day and maximum reimbursable amount is per the 2022/23 State contracts.

Note 3: CSFP Contract was amended from $4,544,694 to $7,153,992
### Communiy Action Partnership of Kern

**State Department of Education 2022/23 Contracts - Earned Revenue**

**San Joaquin County Office of Education**

**For the Period 7/1/22 - 6/30/23 (10 of 12 Months = 83.3%)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>General Child Care (CCTR-1242)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjusted Days of Enrollment - Certified</td>
<td>687</td>
<td>919</td>
<td>880</td>
<td>993</td>
<td>1,188</td>
<td>1,386</td>
<td>1,453</td>
<td>2,025</td>
<td>2,570</td>
<td></td>
<td></td>
<td></td>
<td>12,981</td>
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<tr>
<td>Reimbursement Rate per Child per Day</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
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<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
<td>$46.03</td>
</tr>
<tr>
<td>Maximum Reimbursable Amount (MRA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1,571,900</td>
<td></td>
</tr>
<tr>
<td>Flex Factor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attendance Percentage (Attendance/Enrollment)</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>96.92%</td>
<td>96.48%</td>
<td>97.58%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>98.13%</td>
<td></td>
</tr>
<tr>
<td>Five Percent Flexibility, Maximum = 100 Percent</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td></td>
</tr>
</tbody>
</table>

**Note 1:** Source of adjusted days of enrollment for certified children is the monthly attendance report prepared by the Fiscal Dept. of the Head Start/State Child Development Division.

**Note 2:** Source of reimbursement rate per child per day and maximum reimbursable amount is per the 2022/23 Cooperative Agreement with the San Joaquin County Office of Education.
### Activities

<table>
<thead>
<tr>
<th>Description</th>
<th>April-2023</th>
<th>Year to Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Amount</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank Deposits</td>
<td>10</td>
<td>1,543,818</td>
</tr>
<tr>
<td>Wire Deposits</td>
<td>9</td>
<td>1,388,969</td>
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<tr>
<td>Head Start/IRS Drawdowns</td>
<td>7</td>
<td>819,526</td>
</tr>
<tr>
<td>Vendor Checks Issued</td>
<td>1826</td>
<td>6,558,482</td>
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<tr>
<td>Payroll Disbursed</td>
<td>30</td>
<td>63</td>
</tr>
</tbody>
</table>

### Business Services

#### Purchase Orders

<table>
<thead>
<tr>
<th>Activity</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>409</td>
<td>0</td>
<td>409</td>
<td>818</td>
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</tbody>
</table>

#### Leases

<table>
<thead>
<tr>
<th>Activity</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7</td>
<td>0</td>
<td>7</td>
<td>14</td>
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</tbody>
</table>

#### Requests for Proposals

<table>
<thead>
<tr>
<th>Activity</th>
<th>Requested</th>
<th>In-Progress</th>
<th>Processed</th>
<th>Processed YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

### Business Services Projects

<table>
<thead>
<tr>
<th>Description</th>
<th>% Completed</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Subcontractor</td>
<td>100</td>
<td>Issued on April 26</td>
</tr>
<tr>
<td>Design Build Sports Field Lighting FHCC</td>
<td>100</td>
<td>Completed</td>
</tr>
</tbody>
</table>

### Total Division Staffing

29 positions + 0 Vacancies

- **CFO**: Accounting Technician (5)
- **Director of Finance**: Accounting Specialist (2)
- **Finance Administrator**: AP Supervisor (1)
- **Payroll/HRIS Manager**: Fiscal Technician (2)
- **Accounting Administrator**: Payroll Specialists (3)
- **Accounting Administrator - Energy**: Payroll Supervisor (1)
- **Accountant (2)**: Administrative Assistant to CFO
- **Accountant II (2)**:  

---

**Division/CFO:** Tracy Webster, CFO  
**Program/Work Unit:** Not Applicable  
**Month/Year:** April-2023  
**Director of Finance:** Gabrielle Alexander  
**Services:** Overall financial and accounting functions of the organization
<table>
<thead>
<tr>
<th>ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash in Bank</td>
<td>12,446,745</td>
<td>Grant Revenue</td>
</tr>
<tr>
<td>Cash - Vacation Reserve</td>
<td>1,050,719</td>
<td>100,611,872</td>
</tr>
<tr>
<td>Petty Cash</td>
<td>-</td>
<td>Donations</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>2,275,586</td>
<td>451,662</td>
</tr>
<tr>
<td>Travel Advance</td>
<td>200</td>
<td>Other Revenue</td>
</tr>
<tr>
<td>Prepaid Expense</td>
<td>999,684</td>
<td>8,292,072</td>
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<tr>
<td>Inventory</td>
<td>1,083,946</td>
<td>In-Kind</td>
</tr>
<tr>
<td>Net Fixed Assets - Unrestricted</td>
<td>703,156</td>
<td>261,800</td>
</tr>
<tr>
<td>Net Fixed Assets - Restricted</td>
<td>22,228,403</td>
<td>Total Revenue</td>
</tr>
<tr>
<td>Total Assets</td>
<td>40,788,439</td>
<td>109,617,407</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>7,537,974</td>
<td>Salaries</td>
</tr>
<tr>
<td>Accrued Expenses</td>
<td>2,980,360</td>
<td>40,298,475</td>
</tr>
<tr>
<td>Accrued Vacation</td>
<td>1,743,490</td>
<td>Benefits</td>
</tr>
<tr>
<td>Line of Credit</td>
<td>-</td>
<td>11,019,546</td>
</tr>
<tr>
<td>Note Payable</td>
<td>704,130</td>
<td>Travel</td>
</tr>
<tr>
<td>Advance Payable</td>
<td>5,080,966</td>
<td>769,170</td>
</tr>
<tr>
<td>Deferred Revenue</td>
<td>-</td>
<td>Space Costs</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>18,046,919</td>
<td>15,981,801</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>22,741,520</td>
<td>Supplies</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
<td>40,788,439</td>
<td>3,104,378</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENDITURES</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>40,298,475</td>
<td>Consultant/Contract Services</td>
</tr>
<tr>
<td>Benefits</td>
<td>11,019,546</td>
<td>5,764,708</td>
</tr>
<tr>
<td>Travel</td>
<td>769,170</td>
<td>Other Costs</td>
</tr>
<tr>
<td>Space Costs</td>
<td>15,981,801</td>
<td>4,547,090</td>
</tr>
<tr>
<td>Supplies</td>
<td>3,104,378</td>
<td>Program Costs</td>
</tr>
<tr>
<td>Consultant/Contract Services</td>
<td>5,764,708</td>
<td>18,772,446</td>
</tr>
<tr>
<td>Other Costs</td>
<td>4,547,090</td>
<td>Capital Expenditures</td>
</tr>
<tr>
<td>Indirect</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>In-Kind</td>
<td>261,800</td>
<td>Total Expenditures</td>
</tr>
<tr>
<td>Total Expenditures</td>
<td>108,608,677</td>
<td>108,608,677</td>
</tr>
</tbody>
</table>

| Net Change in Assets                       | 1,008,730                |                      |
| Net Assets, beginning                      | 21,732,790               |                      |
| Net Assets, ending                         | 22,741,520               |                      |
### STATEMENT OF POSITION (UNAUDITED)
**AS OF APRIL 30, 2023**

<table>
<thead>
<tr>
<th>ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash in Bank</td>
<td>8,142,306</td>
</tr>
<tr>
<td>Cash - Vacation Reserve</td>
<td>992,950</td>
</tr>
<tr>
<td>Petty Cash</td>
<td>-</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>522,263</td>
</tr>
<tr>
<td>Travel Advance</td>
<td>2,427</td>
</tr>
<tr>
<td>Prepaid Expense</td>
<td>1,070,364</td>
</tr>
<tr>
<td>Inventory</td>
<td>1,099,010</td>
</tr>
<tr>
<td>Net Fixed Assets - Unrestricted</td>
<td>660,204</td>
</tr>
<tr>
<td>Net Fixed Assets - Restricted</td>
<td>22,004,030</td>
</tr>
</tbody>
</table>

**Total Assets**

34,493,555

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>4,508,046</td>
</tr>
<tr>
<td>Accrued Expenses</td>
<td>554,955</td>
</tr>
<tr>
<td>Accrued Vacation</td>
<td>997,588</td>
</tr>
<tr>
<td>Line of Credit</td>
<td>-</td>
</tr>
<tr>
<td>Note Payable</td>
<td>661,178</td>
</tr>
<tr>
<td>Advance Payable</td>
<td>5,080,966</td>
</tr>
<tr>
<td>Deferred Revenue</td>
<td>-</td>
</tr>
</tbody>
</table>

**Total Liabilities**

11,802,732

**Total Net Assets**

22,690,822

<table>
<thead>
<tr>
<th>STATEMENT OF OPERATIONS (UNAUDITED)</th>
<th>FOR THE PERIOD MARCH 1, 2023 TO APRIL 30, 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUE</strong></td>
<td></td>
</tr>
<tr>
<td>Grant Revenue</td>
<td>14,441,058</td>
</tr>
<tr>
<td>Donations</td>
<td>70,535</td>
</tr>
<tr>
<td>Other Revenue</td>
<td>1,403,227</td>
</tr>
<tr>
<td>In-Kind</td>
<td>1,759,526</td>
</tr>
</tbody>
</table>

**Total Revenue**

17,674,346

| **EXPENDITURES**                    |                                               |
| Salaries                            | 4,591,092                                      |
| Benefits                            | 1,629,952                                      |
| Travel                              | 116,086                                        |
| Space Costs                         | 1,100,624                                      |
| Supplies                            | 460,551                                        |
| Consultant/Contract Services        | 939,535                                        |
| Other Costs                         | 740,817                                        |
| Program Costs                       | 4,791,691                                      |
| Capital Expenditures                | 324,704                                        |
| Indirect                            | 1,270,466                                      |
| In-Kind                             | 1,759,526                                      |

**Total Expenditures**

17,725,044

**Net Change in Assets**

(50,697)

**Net Assets, beginning**

22,741,520

**Net Assets, ending**

22,690,822

Date Prepared: 6/5/2023

Prepared by: Tracy Webster, CFO
<table>
<thead>
<tr>
<th>EXPENDITURES</th>
<th>ANNUAL BUDGET</th>
<th>EXPENDITURES</th>
<th>BUDGET AVAILABLE</th>
<th>PERCENTAGE EXPENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES</td>
<td>44,051,888</td>
<td>4,531,070</td>
<td>39,520,818</td>
<td>10%</td>
</tr>
<tr>
<td>BENEFITS</td>
<td>14,158,980</td>
<td>1,514,485</td>
<td>12,644,495</td>
<td>11%</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>860,927</td>
<td>105,857</td>
<td>755,070</td>
<td>12%</td>
</tr>
<tr>
<td>SPACE COST</td>
<td>5,119,714</td>
<td>1,056,332</td>
<td>4,063,382</td>
<td>21%</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>2,275,029</td>
<td>419,342</td>
<td>1,855,687</td>
<td>18%</td>
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<tr>
<td>EQUIPMENT</td>
<td>410,420</td>
<td>495,842</td>
<td>(85,422)</td>
<td>121%</td>
</tr>
<tr>
<td>CONSULTANT/CONTRACT SERVICES</td>
<td>3,053,138</td>
<td>691,506</td>
<td>2,361,632</td>
<td>23%</td>
</tr>
<tr>
<td>OTHER COSTS</td>
<td>2,757,892</td>
<td>628,092</td>
<td>2,129,800</td>
<td>23%</td>
</tr>
<tr>
<td>PROGRAM COSTS</td>
<td>26,485,434</td>
<td>4,728,130</td>
<td>21,757,304</td>
<td>18%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>9,589,595</td>
<td>1,304,468</td>
<td>8,285,127</td>
<td>14%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>108,763,017</td>
<td>15,475,124</td>
<td>93,287,893</td>
<td>14%</td>
</tr>
</tbody>
</table>
## COMMUNITY ACTION PARTNERSHIP OF KERN
### BUDGET TO ACTUAL
#### FOR THE PERIOD 03-01-23 TO 04-30-23 (16.7%)

<table>
<thead>
<tr>
<th>EXPENDITURES</th>
<th>ANNUAL BUDGET</th>
<th>EXPENDITURES</th>
<th>BUDGET AVAILABLE</th>
<th>PERCENTAGE EXPENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES</td>
<td>31,698,221</td>
<td>3,472,940</td>
<td>28,225,281</td>
<td>11%</td>
</tr>
<tr>
<td>BENEFITS</td>
<td>10,482,845</td>
<td>1,149,398</td>
<td>9,333,447</td>
<td>11%</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>606,386</td>
<td>69,550</td>
<td>536,836</td>
<td>11%</td>
</tr>
<tr>
<td>SPACE COST</td>
<td>2,923,727</td>
<td>(174,028)</td>
<td>3,097,755</td>
<td>-6%</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>1,779,693</td>
<td>300,720</td>
<td>1,478,973</td>
<td>17%</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>396,870</td>
<td>153,567</td>
<td>243,303</td>
<td>39%</td>
</tr>
<tr>
<td>CONSULTANT/CONTRACT SERVICES</td>
<td>1,306,125</td>
<td>144,288</td>
<td>1,161,837</td>
<td>11%</td>
</tr>
<tr>
<td>OTHER COSTS</td>
<td>1,162,562</td>
<td>237,021</td>
<td>925,541</td>
<td>20%</td>
</tr>
<tr>
<td>PROGRAM COSTS</td>
<td>22,106,428</td>
<td>3,986,851</td>
<td>18,119,577</td>
<td>18%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>7,214,192</td>
<td>966,210</td>
<td>6,247,982</td>
<td>13%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>79,677,049</td>
<td>10,306,516</td>
<td>69,370,533</td>
<td>13%</td>
</tr>
</tbody>
</table>
## COMMUNITY ACTION PARTNERSHIP OF KERN
### BUDGET TO ACTUAL
#### FOR THE PERIOD 03-01-23 TO 04-30-23 (16.7%)
COMMUNITY ACTION PARTNERSHIP OF KERN
BUDGET TO ACTUAL
FOR THE PERIOD 03-01-23 TO 04-30-23 (16.7%)

<table>
<thead>
<tr>
<th>EXPENDITURES</th>
<th>ANNUAL BUDGET</th>
<th>EXPENDITURES</th>
<th>BUDGET AVAILABLE</th>
<th>PERCENTAGE EXPENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES</td>
<td>2,279,389</td>
<td>203,729</td>
<td>2,075,660</td>
<td>9%</td>
</tr>
<tr>
<td>BENEFITS</td>
<td>683,820</td>
<td>79,282</td>
<td>604,538</td>
<td>12%</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>50,000</td>
<td>5,670</td>
<td>44,330</td>
<td>11%</td>
</tr>
<tr>
<td>SPACE COST</td>
<td>237,186</td>
<td>34,635</td>
<td>202,551</td>
<td>15%</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>109,499</td>
<td>31,712</td>
<td>77,787</td>
<td>29%</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td>CONSULTANT/CONTRACT SERVICES</td>
<td>229,213</td>
<td>213,263</td>
<td>15,950</td>
<td>93%</td>
</tr>
<tr>
<td>OTHER COSTS</td>
<td>654,000</td>
<td>166,501</td>
<td>487,499</td>
<td>25%</td>
</tr>
<tr>
<td>PROGRAM COSTS</td>
<td>481,231</td>
<td>57,657</td>
<td>423,574</td>
<td>12%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>472,412</td>
<td>77,397</td>
<td>395,015</td>
<td>16%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>5,196,750</td>
<td>869,845</td>
<td>4,326,905</td>
<td>17%</td>
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</tbody>
</table>
COMMUNITY ACTION PARTNERSHIP OF KERN
BUDGET TO ACTUAL
FOR THE PERIOD 03-01-23 TO 04-30-23 (16.7%)

<table>
<thead>
<tr>
<th>EXPENDITURES</th>
<th>ANNUAL BUDGET</th>
<th>EXPENDITURES</th>
<th>BUDGET AVAILABLE</th>
<th>PERCENTAGE EXPENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES</td>
<td>4,219,812</td>
<td>336,271</td>
<td>3,883,541</td>
<td>8%</td>
</tr>
<tr>
<td>BENEFITS</td>
<td>1,226,969</td>
<td>110,109</td>
<td>1,116,860</td>
<td>9%</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>55,702</td>
<td>7,147</td>
<td>48,555</td>
<td>13%</td>
</tr>
<tr>
<td>SPACE COST</td>
<td>953,189</td>
<td>403,064</td>
<td>550,125</td>
<td>42%</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>232,451</td>
<td>38,016</td>
<td>194,435</td>
<td>16%</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>13,550</td>
<td>171,137</td>
<td>(157,587)</td>
<td>1263%</td>
</tr>
<tr>
<td>CONSULTANT/CONTRACT SERVICES</td>
<td>830,833</td>
<td>270,636</td>
<td>560,197</td>
<td>33%</td>
</tr>
<tr>
<td>OTHER COSTS</td>
<td>380,166</td>
<td>106,879</td>
<td>273,287</td>
<td>28%</td>
</tr>
<tr>
<td>PROGRAM COSTS</td>
<td>825,804</td>
<td>62,600</td>
<td>763,204</td>
<td>8%</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>779,220</td>
<td>110,535</td>
<td>668,685</td>
<td>14%</td>
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<td>TOTAL</td>
<td>9,517,696</td>
<td>1,616,395</td>
<td>7,901,301</td>
<td>17%</td>
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## COMMUNITY ACTION PARTNERSHIP OF KERN
### BUDGET TO ACTUAL
#### FOR THE PERIOD 03-01-23 TO 04-30-23 (16.7%)
### DISCRETIONARY & FUND RAISING

<table>
<thead>
<tr>
<th>EXPENDITURES</th>
<th>ANNUAL BUDGET</th>
<th>EXPENDITURES</th>
<th>BUDGET AVAILABLE</th>
<th>PERCENTAGE EXPENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES</td>
<td>157,156</td>
<td>12,610</td>
<td>144,546</td>
<td>8%</td>
</tr>
<tr>
<td>BENEFITS</td>
<td>48,718</td>
<td>2,536</td>
<td>46,182</td>
<td>5%</td>
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<tr>
<td>TRAVEL</td>
<td>24,750</td>
<td>-</td>
<td>24,750</td>
<td>0%</td>
</tr>
<tr>
<td>SPACE COST</td>
<td>5,700</td>
<td>-</td>
<td>5,700</td>
<td>0%</td>
</tr>
<tr>
<td>SUPPLIES</td>
<td>8,800</td>
<td>1,751</td>
<td>7,050</td>
<td>20%</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td>CONSULTANT/CONTRACT SERVICES</td>
<td>30,307</td>
<td>95</td>
<td>30,212</td>
<td>0%</td>
</tr>
<tr>
<td>OTHER COSTS</td>
<td>109,610</td>
<td>8,254</td>
<td>101,356</td>
<td>8%</td>
</tr>
<tr>
<td>PROGRAM COSTS</td>
<td>-</td>
<td>46,475</td>
<td>(46,475)</td>
<td>Not budgeted</td>
</tr>
<tr>
<td>INDIRECT</td>
<td>38,484</td>
<td>6,754</td>
<td>31,730</td>
<td>18%</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>423,525</strong></td>
<td><strong>78,475</strong></td>
<td><strong>345,050</strong></td>
<td><strong>19%</strong></td>
</tr>
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</table>
## Community Action Partnership of Kern
### Indirect Fund - FY 2023/24
### Budget to Actual - 03/01/23 to 4/30/23 (2 of 12 Months = 16.7%)

<table>
<thead>
<tr>
<th></th>
<th>Budget</th>
<th>Actual</th>
<th>% Earned/Expended</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td>$ 9,589,595</td>
<td>$ 1,304,468</td>
<td>13.6%</td>
<td>$ 8,285,127</td>
</tr>
<tr>
<td><strong>Expenditures</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries</td>
<td>4,599,831</td>
<td>492,176</td>
<td>10.7%</td>
<td>4,107,655</td>
</tr>
<tr>
<td>Benefits @ 23.6% actual</td>
<td>1,190,237</td>
<td>147,851</td>
<td>12.4%</td>
<td>1,042,386</td>
</tr>
<tr>
<td><strong>Total Personnel Costs</strong></td>
<td>5,790,068</td>
<td>640,027</td>
<td>11.1%</td>
<td>5,150,041</td>
</tr>
<tr>
<td><strong>Operating Costs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>88,000</td>
<td>6,316</td>
<td>7.2%</td>
<td>81,684</td>
</tr>
<tr>
<td>Space Costs</td>
<td>386,450</td>
<td>21,126</td>
<td>5.5%</td>
<td>365,324</td>
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<tr>
<td>Supplies</td>
<td>262,650</td>
<td>37,006</td>
<td>14.1%</td>
<td>225,644</td>
</tr>
<tr>
<td>Consultant/Contract</td>
<td>1,049,000</td>
<td>187,032</td>
<td>17.8%</td>
<td>861,968</td>
</tr>
<tr>
<td>Other Operating Costs</td>
<td>780,300</td>
<td>121,514</td>
<td>15.6%</td>
<td>658,786</td>
</tr>
<tr>
<td><strong>Total Operating Costs</strong></td>
<td>2,566,400</td>
<td>372,994</td>
<td>14.5%</td>
<td>2,193,406</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td>$ 8,356,468</td>
<td>$ 1,013,021</td>
<td>12.1%</td>
<td>$ 7,343,447</td>
</tr>
<tr>
<td><strong>Excess (Deficit) Indirect Revenue</strong></td>
<td>$ 1,233,127</td>
<td>$ 291,447</td>
<td></td>
<td></td>
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</tbody>
</table>

### Recap by Support Division

<table>
<thead>
<tr>
<th>RECAP BY SUPPORT DIVISION</th>
<th>Budget</th>
<th>Actual</th>
<th>% Expended</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR</td>
<td>$ 1,302,127</td>
<td>$ 166,270</td>
<td>12.8%</td>
<td>$ 1,135,857</td>
</tr>
<tr>
<td>Operations</td>
<td>2,700,165</td>
<td>352,492</td>
<td>13.1%</td>
<td>2,347,673</td>
</tr>
<tr>
<td>Executive</td>
<td>500,950</td>
<td>123,357</td>
<td>24.6%</td>
<td>377,593</td>
</tr>
<tr>
<td>Program Administration</td>
<td>-</td>
<td>202</td>
<td>Not budgeted</td>
<td>(202)</td>
</tr>
<tr>
<td>Finance</td>
<td>2,523,658</td>
<td>315,619</td>
<td>12.5%</td>
<td>2,208,039</td>
</tr>
<tr>
<td>Community Development</td>
<td>1,329,568</td>
<td>55,081</td>
<td>4.1%</td>
<td>1,274,487</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 8,356,468</td>
<td>$ 1,013,021</td>
<td>12.1%</td>
<td>$ 7,343,447</td>
</tr>
</tbody>
</table>

Prepared Date: 06/09/23
MEMORANDUM

To: Board of Directors

From: Emilio G. Wagner, Director of Operations

Date: June 28, 2023

Subject: Agenda Item V(a): Workers Compensation Insurance Renewal – Emilio Wagner, Director of Operations – Info Item

The workers’ compensation policy of CAPK is due to expire on July 31, 2023, and requires a renewal to prevent a lapse of coverage. Bolton, CAPK’s insurance broker, requested a renewal proposal from Berkshire Hathaway which was $866,963 resulting in a $186,544 or 27% increase in premium over the expiring year of $680,419.

The increase is attributed to the change in experience modification factor from 88 to 108 and a 10% increase in payroll. In light of this increase, Bolton is requesting proposals from other carriers for alternatives and substantiating the proposal from Berkshire Hathaway. Proposals are not available at the time of developing the agenda but will be presented at the meeting if available. A final recommendation will be presented to the Board during the July Executive Committee meeting.

Attachment
2023-2024 Workers Compensation Proposal
A Renewal Proposal for

Community Action Partnership of Kern County

Effective: July 31, 2023
August 1, 2023

Jonathan Schreter CIC, MBA
Executive Vice President

Bolton Insurance Services, LLC
License # 6004772

Prepared: June 20, 2023
<table>
<thead>
<tr>
<th>Service Team</th>
<th>Direct</th>
<th>Fax</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broker</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jonathan Schreter, Executive Vice President</td>
<td>(626) 535-1408</td>
<td>(626) 583-4609</td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:jschreter@boltonco.com">jschreter@boltonco.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debra Rosas, Associate Vice President</td>
<td>(626) 535-1829</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:drosas@boltonco.com">drosas@boltonco.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Julio Lopez, Client Executive</td>
<td>(626) 535-1441</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:jlopez@boltonco.com">jlopez@boltonco.com</a></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Abigail Dankwah, Associate Client Manager</td>
<td>(626) 535-1443</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:adankwah@boltonco.com">adankwah@boltonco.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Team Fax</td>
<td>(626) 583-2117</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property &amp; Casualty Resources</td>
<td>Direct</td>
<td>Fax</td>
<td>E-mail</td>
</tr>
<tr>
<td>Certificates/ Evidences</td>
<td>Rush - Receipt in 3 Hours</td>
<td><a href="mailto:Rushcertrequest@boltonco.com">Rushcertrequest@boltonco.com</a></td>
<td>(626) 583-2117</td>
</tr>
<tr>
<td>Email: <a href="mailto:certrequest@boltonco.com">certrequest@boltonco.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property &amp; Casualty Claims</td>
<td>Direct</td>
<td>Fax</td>
<td>E-mail</td>
</tr>
<tr>
<td>Marianne Reyes, Senior Claim Consultant</td>
<td>(626) 507-1344</td>
<td>(626) 583-2117</td>
<td></td>
</tr>
<tr>
<td>Direct: (626) 507-1344</td>
<td>(626) 583-2117</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: <a href="mailto:mreyes@boltonco.com">mreyes@boltonco.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workers’ Comp Claims</td>
<td>Direct</td>
<td>Fax</td>
<td>E-mail</td>
</tr>
<tr>
<td>Lorenda Edmundson, Sr. Workers’ Comp Consultant</td>
<td>(626) 535-1815</td>
<td>(626) 583-2117</td>
<td></td>
</tr>
<tr>
<td>Direct: (626) 535-1815</td>
<td>(626) 583-2117</td>
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<tr>
<td>E-mail: <a href="mailto:ledmundson@boltonco.com">ledmundson@boltonco.com</a></td>
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<tr>
<td>Risk Control</td>
<td>Direct</td>
<td>Fax</td>
<td>E-mail</td>
</tr>
<tr>
<td>Stefanie Nobriga, Associate Vice President of Risk Control</td>
<td>(626) 535-1436</td>
<td>(626) 583-2117</td>
<td></td>
</tr>
<tr>
<td>Direct: (626) 535-1436</td>
<td>(626) 583-2117</td>
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<tr>
<td>E-mail: <a href="mailto:snobriga@boltonco.com">snobriga@boltonco.com</a></td>
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<tr>
<td>Bonds</td>
<td>Direct</td>
<td>Fax</td>
<td>E-mail</td>
</tr>
<tr>
<td>Mary Smith, Associate Producer Surety</td>
<td>(626) 535-1473</td>
<td>(626) 583-2124</td>
<td></td>
</tr>
<tr>
<td>Direct: (626) 535-1473</td>
<td>(626) 583-2124</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail: ms <a href="mailto:smith@boltonco.com">smith@boltonco.com</a></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Department Leads</th>
<th>Direct</th>
<th>Fax</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property &amp; Casualty</td>
<td>Erin Powell, Senior Vice President, Property &amp; Casualty</td>
<td>(626) 535-1439</td>
<td>(626) 583-2117</td>
</tr>
<tr>
<td>Direct: (626) 535-1439</td>
<td>(626) 583-2117</td>
<td></td>
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</tr>
<tr>
<td>E-mail: <a href="mailto:epowell@boltonco.com">epowell@boltonco.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>Jacqueline Roth, Director of Employee Benefits</td>
<td>(626) 535-1968</td>
<td>(626) 583-2119</td>
</tr>
<tr>
<td>Direct: (626) 535-1968</td>
<td>(626) 583-2119</td>
<td></td>
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<tr>
<td>E-mail: <a href="mailto:jroth@boltonco.com">jroth@boltonco.com</a></td>
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<td></td>
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<tr>
<td>Personal Risk Management</td>
<td>Jessica Gunnar, Senior Vice President</td>
<td>(626) 535-1817</td>
<td>(626) 583-2116</td>
</tr>
<tr>
<td>Direct: (626) 535-1817</td>
<td>(626) 583-2116</td>
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<tr>
<td>E-mail: <a href="mailto:jgunnar@boltonco.com">jgunnar@boltonco.com</a></td>
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</tbody>
</table>
## Premium Comparison

### Community Action Partnership of Kern County

<table>
<thead>
<tr>
<th></th>
<th>2022-2023 Expiring Premium</th>
<th>2023-2024 Renewal Premium</th>
<th>$ Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student and Volunteer Accident</td>
<td>$6,793</td>
<td>$6,793</td>
<td>$0</td>
<td>0%</td>
</tr>
<tr>
<td>Workers’ Compensation</td>
<td>$635,906</td>
<td>$812,597</td>
<td>$176,691</td>
<td>28%</td>
</tr>
<tr>
<td>State Taxes</td>
<td>$37,720</td>
<td>$47,573</td>
<td>$9,853</td>
<td>26%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$680,419</strong></td>
<td><strong>$866,963</strong></td>
<td><strong>$186,544</strong></td>
<td><strong>27%</strong></td>
</tr>
</tbody>
</table>

This proposal is a summary of terms and conditions proposed by the insurers based on the information obtained from you. The policy must be reviewed for all of the coverages, terms, conditions, and exclusions. Policy forms will be made available at your request. The issued policy will supersede this proposal.

**Higher Limits May be Available for All Coverages**
**WORKERS COMPENSATION**

**Independent Contractors and Subcontractors:**
In the event that an Insured utilizes subcontracted labor, the insured must furnish satisfactory evidence that the subcontractor has workers compensation insurance in force, covering the work performed for the insured. The following documents may be used to provide satisfactory evidence:
- Certificate of Insurance for the subcontractor’s workers compensation policy
- Certificate of exemption (if available in their state - not available in CA)
- Copy of the Subcontractor’s workers compensation policy

In the event any form of this documentation is not available for review or deemed otherwise insufficient, amounts paid to these subcontractors or independent contractors will be included as payroll and utilized in the calculation of final audit premium

Signed Acord Application

**Please be aware that your 15% Deposit will be applied to your twelfth policy month’s premium, which will be handled as part of your final audit. Afterwards, any remaining Deposit will be returned to you.**

**Optional Coverage Quote/Indications**
10% Additional Premium to Extend Benefit Period to 104 Weeks. **$7,472 Total Premium.**
Schedule of Locations

1. 5005 Business Park North, Bakersfield, CA 93309
2. 300 19th St, Bakersfield, CA 93301
3. 5704 Pioneer Dr, Bakersfield, CA 93306
4. 7998 Alicante Ave, Lamont, CA 93241
5. 347 E Poplar St, Stockton, CA 95202
6. 9124 Catalpa Ave, California City, CA 93505
7. 425 N California St #2, Stockton, CA 95202
8. 23950 S Chrisman Rd, Tracy, CA 95304
9. 1835 Cecil Ave, Delano, CA 93215
10. 1900 East California Ave, Bakersfield, CA 93307
11. 1500 S Fairfax Rd, Bakersfield, CA 93307
12. 2320 Mount Vernon Ave, Bakersfield, CA 93306-3300
13. 1145 N Hunter St, Stockton, CA 95202
14. 8201 Palm Ave, Lamont, CA 93241
15. 3811 River Blvd, Bakersfield, CA 93305
16. 410 E Perkins, McFarland, CA 93250
17. 1940 Inyo St, Mojave, CA 93501
18. 814 North Norma, Ridgecrest, CA 93555
19. 1111 Bush St, Arvin, CA 93203
20. 10300-1/2 San Diego St, Lamont, CA 93241
21. 2800 Agate St, Bakersfield, CA 93304
22. 452 W Los Angeles St, Shafter, CA 93263
23. 455 East Euclid Ave, Shafter, CA 93263
24. 545 W Sonora St, Stockton, CA 95203
25. 4032 Jewett Ave, Bakersfield, CA 93301
26. 3000 Sterling Rd, Bakersfield, CA 93306
27. 315 Stine Rd, Bakersfield, CA 93309
28. 1600 Poplar Ave, Wasco, CA 93280
29. 819 6th St, Taft, CA 93268
30. 1120 S Curry, Tehachapi, CA 93561
31. 14327 S Vineland Rd, Bakersfield, CA 93307
32. 3301 Virginia Ave, Bakersfield, CA 93307
33. 401 Willow, Bakersfield, CA 93308
34. 3101 Mall View Rd, Bakersfield, CA 93306
35. 1807 Feliz Dr, Bakersfield, CA 93307
36. 11336 Bartlett Ave, Adelanto, CA 92301
37. 24028 Lake Dr, Crestline, CA 92325
38. 814 North Norma, Ridgecrest, CA 93555
39. 1825 Feliz Dr, # B, Bakersfield, CA 93307-3577
40. 5055 California Ave, #101, Bakersfield, CA 93309
41. 1600 E Truxtun Avenue, Bakersfield, CA 93305
42. 26904 Nicholas Street, Boron, CA 93516
43. 277 E. Front, Buttonwillow, CA 93206
44. 610 Blandy, China Lake, CA 93555
45. 90 Farrell Drive, Bldg 5620, Edwards, CA 93524
46. 6019 - 3 & 4 Niles, Bakersfield, CA 93302
Schedule of Locations

47  525 Roberts Lane, Bakersfield, CA 93308
48  4600 Panama Lane, Bakersfield, CA 93313
49  8820 Sheep Creek Rd, Phelan, CA 92371-8988
50  2739 Diamond Street #B, Rosamond, CA 93560
51  650 James Street, Shafter, CA 93263
52  108 So. Robinson, Tehachapi, CA 93261
53  459 E Euclid Ave, Shafter, CA 93263
54  2424 Cottonwood Rd, Bakersfield, CA 93307
55  41820 Garstin Dr, Big Bear Lake, CA 92315
56  16804 Hwy 14, Mojave, CA 93501
57  8401 California City Blvd, #8, California City, CA 93505
58  21138 CA-46, Lost Hills, CA 93249
59  236 W 4th Street, Stockton, CA 95206
60  3500 Mojave, Mojave, CA 93501
61  1509 N Golden Gate, Stockton, CA 95205
62  2800 D Street, Stockton, CA 95206
63  701 S Hutchins St, Lodi, CA 95240
64  2584 Felsite Ave, Rosamond, CA 93560
65  1314 Oswell St, Bakersfield, CA 93306
66  1815 Van Ness, Fresno, CA 93721
67  525 East Yosemite, Madera, CA 93638
68  7000 Doe Ave, Visalia, CA 93291
69  5351 Olive Dr, Ste 200, Bakersfield, CA 93308-2926
70  929 Broadway St, Wasco, CA 93280
71  1840 Wardrobe Ave, Merced, CA 95341-6407
72  2101 7th St, Bldg E, Wasco, CA 93280
73  2323 16th St., #305, Bakersfield, CA 93301
74  244 G St, Ste A, Needles, CA 92363-2753
75  500 E California Ave, Bakersfield, CA 93307-1142
76  1410 11th St, Bakersfield, CA 93304-1432
77  1001 Main St, Delano, CA 93215-1731
78  819 6th Ave E, Taft, CA 93268
79  2550 E Belle Terrace, #200, Bakersfield, CA 93307
80  2550 E Belle Terrace, # 400-402, Bakersfield, CA 93307-6966
81  2900 M Street, Bakersfield, CA 93301
82  1825 Feliz Dr, Bakersfield, CA 93307
83  220 N. 11th Ave, Hanford, CA 93230
84  2800 S D St, Stockton, CA 95206
85  5055 California Ave, #220, Bakersfield, CA 93309
# Renewal Proposal of Insurance

## 2023-2024

### Community Action Partnership of Kern County

<table>
<thead>
<tr>
<th></th>
<th>2022-2023 Expiring</th>
<th>2023-2024 Renewal</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accident</strong></td>
<td>QBE Insurance Corp. A XV Admitted</td>
<td>QBE Insurance Corp. A XV Admitted</td>
<td></td>
</tr>
<tr>
<td>Basic Medical Expense Limit</td>
<td>$50,000</td>
<td>$50,000</td>
<td></td>
</tr>
<tr>
<td>Deductible</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Benefit Period</td>
<td>52 Weeks</td>
<td>52 Weeks</td>
<td></td>
</tr>
<tr>
<td>Accidental Death/Accidental Dismemberment</td>
<td>$10,000/$10,000</td>
<td>$10,000/$10,000</td>
<td></td>
</tr>
<tr>
<td>Coma</td>
<td>$50,000</td>
<td>$50,000</td>
<td></td>
</tr>
<tr>
<td>Paralysis</td>
<td>$50,000</td>
<td>$50,000</td>
<td></td>
</tr>
<tr>
<td>Dental - Per Accident</td>
<td>Included</td>
<td>Included</td>
<td></td>
</tr>
<tr>
<td>AD&amp;D Aggregate</td>
<td>$250,000</td>
<td>$250,000</td>
<td></td>
</tr>
<tr>
<td>Medical Evacuation</td>
<td>N/A</td>
<td>$25,000</td>
<td></td>
</tr>
<tr>
<td>Repatriation of Remains</td>
<td>N/A</td>
<td>$10,000</td>
<td></td>
</tr>
</tbody>
</table>

**CONDITIONS:** This policy is excess over primary health insurance if available. Includes Volunteers and Daycare. Incurred Period is 180 Days for Medical Expenses and 365 days for AD&D. Emergency Sickness Benefit is for overnight activities and field trips. Worldwide Coverage. 48 Hour Non-Network HMO/PPO Benefit Window; Medical Evacuation and Repatriation of Remains - must be more than 100 miles from principal residence for this coverage to take effect. 10% Additional Premium to Extend Benefit Period to 104 Weeks.

**EXCLUSIONS:** Please see the policy for a full list of exclusions.

<table>
<thead>
<tr>
<th></th>
<th>Cypress Ins Co A++ XV Admitted</th>
<th>Cypress Ins Co A++ XV Admitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employers Liability Limits</td>
<td>$1,000,000</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Annual Payroll</td>
<td>$34,642,552</td>
<td>$38,036,044</td>
</tr>
<tr>
<td>Ex-Mod</td>
<td>88%</td>
<td>108%</td>
</tr>
</tbody>
</table>

Quote is contingent upon the insured's participation in the Medical Provider Network (MPN); Subject to Final Audit; Volunteer Coverage Not Included. USL&H Not Included.
# Workers' Compensation Comparison

## Community Action Partnership of Kern County

<table>
<thead>
<tr>
<th>Coverage Description</th>
<th>2022-2023 Premium</th>
<th>2023-2024 Premium</th>
<th>$ Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workers’ Compensation</td>
<td>$635,906</td>
<td>$812,597</td>
<td>$176,691</td>
<td>28%</td>
</tr>
<tr>
<td>Taxes &amp; Fees</td>
<td>$37,720</td>
<td>$47,573</td>
<td>$9,853</td>
<td>26%</td>
</tr>
<tr>
<td>Total Premium</td>
<td>$673,626</td>
<td>$860,170</td>
<td>$186,544</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Deposit:** $169,462.55 (15%)
**Payment Plan:** 11 monthly payroll reports

<table>
<thead>
<tr>
<th>Classifications</th>
<th>2022-2023 Payroll</th>
<th>2023-2024 Payroll</th>
<th>$ Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5140 - Electrical Wiring</td>
<td>$84,652</td>
<td>-</td>
<td>$(84,652)</td>
<td>-100%</td>
</tr>
<tr>
<td>5146 - Cabinet Fixtures</td>
<td>$232,040</td>
<td>$255,244</td>
<td>$23,204</td>
<td>10%</td>
</tr>
<tr>
<td>5479 - Insulation Work</td>
<td>$175,276</td>
<td>$192,804</td>
<td>$17,528</td>
<td>10%</td>
</tr>
<tr>
<td>8018 - Stores Wholesale</td>
<td>$1,009,386</td>
<td>$1,110,325</td>
<td>$100,939</td>
<td>10%</td>
</tr>
<tr>
<td>8227 - Construction/Erection Yards</td>
<td>$39,825</td>
<td>$66,161</td>
<td>$26,336</td>
<td>66%</td>
</tr>
<tr>
<td>8742 - Salespersons</td>
<td>$2,389,378</td>
<td>$2,628,316</td>
<td>$238,938</td>
<td>10%</td>
</tr>
<tr>
<td>8804 - Substance Use Recovery</td>
<td>$707,442</td>
<td>$778,186</td>
<td>$70,744</td>
<td>10%</td>
</tr>
<tr>
<td>8810 - Clerical</td>
<td>$9,660,139</td>
<td>$10,626,153</td>
<td>$966,014</td>
<td>10%</td>
</tr>
<tr>
<td>9059 - Day Care Centers</td>
<td>$19,794,052</td>
<td>$21,773,457</td>
<td>$1,979,405</td>
<td>10%</td>
</tr>
<tr>
<td>9067 - Clubs Boys &amp; Girls</td>
<td>$550,362</td>
<td>$605,398</td>
<td>$55,036</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Total Payroll</strong></td>
<td>$34,642,552</td>
<td>$38,036,044</td>
<td>$3,393,492</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Classifications</th>
<th>2022-2023 Net Rate</th>
<th>2023-2024 Net Rate</th>
<th># Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5140 - Electrical Wiring</td>
<td>1.75</td>
<td>2.35</td>
<td>0.60</td>
<td>34%</td>
</tr>
<tr>
<td>5146 - Cabinet Fixtures</td>
<td>5.30</td>
<td>6.50</td>
<td>1.20</td>
<td>23%</td>
</tr>
<tr>
<td>5479 - Insulation Work</td>
<td>6.50</td>
<td>7.76</td>
<td>1.26</td>
<td>19%</td>
</tr>
<tr>
<td>8018 - Stores Wholesale</td>
<td>6.29</td>
<td>8.21</td>
<td>1.92</td>
<td>31%</td>
</tr>
<tr>
<td>8227 - Construction/Erection Yards</td>
<td>4.36</td>
<td>5.02</td>
<td>0.66</td>
<td>15%</td>
</tr>
<tr>
<td>8742 - Salespersons</td>
<td>0.40</td>
<td>0.49</td>
<td>0.09</td>
<td>23%</td>
</tr>
<tr>
<td>8804 - Substance Use Recovery</td>
<td>3.33</td>
<td>3.20</td>
<td>-0.13</td>
<td>-4%</td>
</tr>
<tr>
<td>8810 - Clerical</td>
<td>0.26</td>
<td>0.35</td>
<td>0.09</td>
<td>35%</td>
</tr>
<tr>
<td>9059 - Day Care Centers</td>
<td>2.52</td>
<td>2.76</td>
<td>0.24</td>
<td>10%</td>
</tr>
<tr>
<td>9067 - Clubs Boys &amp; Girls</td>
<td>1.83</td>
<td>2.00</td>
<td>0.17</td>
<td>9%</td>
</tr>
<tr>
<td>Experience Modification</td>
<td>88%</td>
<td>108%</td>
<td>0.20</td>
<td>23%</td>
</tr>
</tbody>
</table>

Net Rates do not include Expense Constant, Terrorism, or CA Assessments & Fees.
Insurance Coverage Checklist

Below is a list of usually available, but not all inclusive, coverages. Those items checked represent the coverages proposed. If the item is not checked, the coverage is not included. If you are interested in an explanation of and/or quotation for any of these coverages, please let us know.

- Property (Building and Contents, Including Property of Others)
- Building Ordinance
- Equipment Breakdown
- Business Income
- Extra Expense
- Loss of Rents
- Flood
- Earthquake
- Earthquake Sprinkler Leakage
- Electronic Data Processing
- Signs
- Motor Truck Cargo Liability
- Transportation
- Ocean Cargo
- Employee’s Tool Floater
- Equipment Floater
- Installation Floater
- Valuable Papers (On & Off Premises)
- Accounts Receivable
- Mold
- Terrorism
- Funds Transfer Fraud
- Crime/ERISA
- Employee Dishonesty
- Money and Securities
-Forgery and Alteration
- Computer Fraud
- General Liability
- Employee Benefits Liability
- Aircraft Liability/Drone
- Automobile
- Foreign Property/Liability/WC
- Umbrella/Excess Liability
- Workers’ Compensation Employers Liability
- Directors and Officers Liability
- Employment Practices Liability
- Fiduciary Liability
- Kidnap & Ransom
- Cyber/Privacy Liability/Internet Exposure
- Educators Legal Liability
- Pollution Liability
- Miscellaneous Professional Liability
- Law Enforcement Liability
- Student Accident
- Active Assailant/Workplace Violence
- Volunteer Accident
## Proposal Acceptance

### Community Action Partnership of Kern County

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Quote Option</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Workers Compensation Renewal - Cypress Insurance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student &amp; Volunteer Accident Renewal - QBE Insurance Corporation</td>
</tr>
</tbody>
</table>

Insurance Coverage Checklist – Would you like a quote for any of the coverages listed on the insurance coverage checklist section of our proposal?

(.NOTES:)

This proposal is a summary of terms and conditions proposed by the insurers based on information obtained from you. The policy must be reviewed for all of the coverages, terms, conditions, and exclusions. Policy forms will be made available at your request. The issued policy will supersede this proposal.

Higher limits may be available for all coverages.

I have reviewed and accept the coverages and disclosures as summarized in this proposal with any changes indicated above.

________________________________________  ____________________________
Signature                                                  Date

________________________________________
Title
**BEST FINANCIAL STRENGTH RATING GUIDE - (FSR)**

A Best's Financial Strength Rating (FSR) is an independent opinion of an insurer's financial strength and ability to meet its ongoing insurance policy and contract obligations. An FSR is not assigned to specific insurance policies or contracts and does not address any other risk, including, but not limited to, an insurer's claims-payment policies or procedures; the ability of the insurer to dispute or deny claims payment on grounds of misrepresentation or fraud; any specific liability contractually borne by the policy or contract holder. An FSR is not a recommendation to purchase, hold or terminate any insurance policy, contract or any other financial obligation issued by an insurer, nor does it address the suitability of any particular policy or contract for a specific purpose or purchaser. In addition, an FSR may be displayed with a rating identifier, modifier or affiliation code that denotes a unique aspect of the opinion.

### Best’s Financial Strength Rating (FSR) Scale

<table>
<thead>
<tr>
<th>Rating Categories</th>
<th>Rating Symbols</th>
<th>Rating Notches*</th>
<th>Category Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Superior</td>
<td>A+</td>
<td>A++</td>
<td>Assigned to insurance companies that have, in our opinion, a superior ability to meet their ongoing insurance obligations.</td>
</tr>
<tr>
<td>Excellent</td>
<td>A+</td>
<td>A-</td>
<td>Assigned to insurance companies that have, in our opinion, an excellent ability to meet their ongoing insurance obligations.</td>
</tr>
<tr>
<td>Good</td>
<td>B+</td>
<td>B++</td>
<td>Assigned to insurance companies that have, in our opinion, a good ability to meet their ongoing insurance obligations.</td>
</tr>
<tr>
<td>Fair</td>
<td>B</td>
<td>B-</td>
<td>Assigned to insurance companies that have, in our opinion, a fair ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.</td>
</tr>
<tr>
<td>Marginal</td>
<td>C+</td>
<td>C++</td>
<td>Assigned to insurance companies that have, in our opinion, a marginal ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.</td>
</tr>
<tr>
<td>Weak</td>
<td>C</td>
<td>C-</td>
<td>Assigned to insurance companies that have, in our opinion, a weak ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.</td>
</tr>
<tr>
<td>Poor</td>
<td>D</td>
<td></td>
<td>Assigned to insurance companies that have, in our opinion, a poor ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.</td>
</tr>
</tbody>
</table>

### Financial Strength Non-Rating Designations

<table>
<thead>
<tr>
<th>Designation Symbols</th>
<th>Designation Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>Status assigned to insurance companies that are publicly placed under a significant form of regulatory supervision, control or restraint - including cease and desist orders, conservatorship or rehabilitation, but not liquidation - that prevents conduct of normal ongoing insurance operations; an impaired insurer.</td>
</tr>
<tr>
<td>F</td>
<td>Status assigned to insurance companies that are publicly placed in liquidation by a court of law or by forced liquidation; an impaired insurer.</td>
</tr>
<tr>
<td>S</td>
<td>Status assigned to rated insurance companies to suspend the outstanding FSR when sudden and significant events impact operations and rating implications cannot be evaluated due to lack of timely or adequate information; or in cases where continued maintenance of the previously published rating opinion is in violation of evolving regulatory requirements.</td>
</tr>
<tr>
<td>NR</td>
<td>Status assigned to insurance companies that are not rated; may include previously rated insurance companies of insurance companies that have never been rated by A.M. Best.</td>
</tr>
</tbody>
</table>

### Rating Disclosure - Use and Limitations

A Best's Credit Rating (BCR) is a forward-looking independent and objective opinion regarding an insurer's, issuer's or financial obligation's relative creditworthiness. The opinion represents a comprehensive analysis consisting of a quantitative and qualitative evaluation of balance sheet strength, operating performance, business profile and enterprise risk management or, where appropriate, the specific nature and details of a security. Because a BCR is a forward-looking opinion as of the date it is released, it cannot be considered as a fact or guarantee of future credit quality and therefore cannot be described as accurate or inaccurate. A BCR is a relative measure of risk that implies credit quality and is assigned using a scale with a defined population of categories and notches. Entities or obligations assigned the same BCR symbol developed using the same scale, should not be viewed as completely identical in terms of credit quality. Alternatively, they are alike in category (or notches within a category), but given there is a prescribed progression of categories (and notches) used in assigning the ratings of a much larger population of entities or obligations, the categories (notches) cannot mirror the precise subtleties of risk that are inherent within similarly rated entities or obligations. While a BCR reflects the opinion of A.M. Best Rating Services, Inc. (AM Best) of relative creditworthiness, it is not an indicator or predictor of defined impairment or default probability with respect to any specific insurer, issuer or financial obligation. A BCR is not investment advice, nor should it be construed as a consulting or advisory service, as such; it is not intended to be utilized as a recommendation to purchase, hold or terminate any insurance policy, contract, security or any other financial obligation, nor does it address the suitability of any particular policy or contract for a specific purpose or purchaser. Users of a BCR should not rely on it in making any investment decision; however, if used, the BCR must be considered as only one factor. Users must make their own evaluation of each investment decision. A BCR opinion is provided on an "as is" basis without any expressed or implied warranty. In addition, a BCR may be changed, suspended or withdrawn at any time for any reason at the sole discretion of AM Best. BCRs are distributed via the AM Best website at www.ambest.com. For additional information regarding the development of a BCR and other rating-related information and definitions, including outlooks, modifiers, identifiers and affiliation codes, please refer to the report titled "Understanding Best's Credit Ratings" available at no charge on the AM Best website. BCRs are proprietary and may not be reproduced without permission.
Types of Insurance Carriers

Non-Admitted
This is an insurance carrier that is not licensed by the State of California, but is domiciled and admitted in other states and approved for use in California by the Department of Insurance. It is published on the List of Approved Surplus Lines Insurers (LASLI).

Carriers are strictly regulated by their state of domicile and must meet strict surplus lines laws and regulations in order to provide insurance in California.

These carriers are not backed by the California Insurance Guarantee Association (CIGA). They are used when coverage is not available from an admitted company either because domestic carriers feel it is too risky or because broader coverage may be available from a non-admitted carrier.

Admitted
This is an insurance carrier that is licensed to do business in California and regulated by the Department of Insurance. Carriers are strictly regulated. Rates and policy forms must be filed with the Department of Insurance and approved before they can be offered to the insurance consumer.

The carrier is backed by the Insurance Guarantee Association (CIGA), which provides insurance against carriers which become insolvent. It assumes limited responsibility for all claims up to $500,000, with the exception of Worker’s Compensation, which has no limitation. Ocean Cargo and Crime coverages are not insured through the Association.
"Certified Terrorism" is coverage offered by insurance carriers that have the financial backing of the U. S. government under the Terrorism Act of 2002, the Terrorism Risk Insurance Extension Act of 2005, the Reauthorization Act of 2007 and the Reauthorization Act of 2015. The Act is known as “TRIA.”

"Certified Terrorism" is defined under the act as: Any act that is certified by the Secretary of the Treasury, in consultation with the Secretary of Homeland Security, and the Attorney General of the United States, to be an act of terrorism. Criteria include:

a. The act is an act of terrorism.
b. The act is violent or dangerous to human life, property of infrastructure.
c. The act resulted in damage within the United States, or outside of the United States Missions or certain air carriers or vessels.
d. The act has been committed by an individual or individuals as part of an effort to coerce the civilian population of the United States or to influence the policy or affect the conduct of the United States government by coercion.
e. The act must cause at least $5,000,000 in overall insured losses attributable to all types of insurance subject to the Act.
f. The Federal Government will pay based on formula established by law; 85% through 2015, 84% 2016; 83% 2017; 82% 2018; 81% 2019 and 80% 2020, but no more than 100 billion dollars. The carrier’s maximum payment is 100 billion dollars in total for all losses.

No act may be certified as an act of terrorism if the act is committed as part of the course of a war declared by Congress (except for Workers’ Compensation) or if losses resulting from the act, in the aggregate for insurance subject to TRIA, do not exceed $5,000,000.
IMPORTANT DECLARATION AND DISCLOSURE INFORMATION

This document and the information contained herein is designed in a format that is easy to understand and compare against previous insurance programs. As such, it is necessary to use generalized terminology. This document does not in any way confirm that coverage is, or will be, in effect. Coverage can only commence after your request for coverage is accepted by the insurance company, and a deposit premium has been received. This proposal does not in any way infer or suggest that coverage as proposed will be broader than the standard forms provided by the quoted insurance company unless the broadening features are specifically mentioned in writing in this format. The presenter of this proposal has no authority to broaden or infer coverages beyond those that are stated in writing. This proposal is only valid for 30 days.

This proposal is a summary of terms and conditions proposed by the insurers based on the information obtained from you. Therefore, you are solely responsible for the accuracy of the information furnished to the insurance carriers. We are not responsible for verifying any of this information which you have provided, nor shall we have any liability that arises from the inaccuracy of the information which you provided. All changes in your exposures to loss should be reported to us immediately so that proper coverage may be affected.

The policy must be reviewed for all of the coverages, terms, conditions, and exclusions. Policy forms will be made available at your request. The issued policy will supersede this proposal.

Upon acceptance of this proposal, it is necessary to effect insurance with proper values. Reviewing each of the coverages proposed and making changes and updates in accordance with current information and conditions is recommended. Higher limits may be available upon request.

It is important to note that any requests that you make, regarding this proposal or into the future, to change or bind your insurance coverage through email, voicemail or verbally with our staff will not take effect until written notice is received from us.

Any advice or guidance provided by any of our staff shall not be construed or relied upon as legal, accounting or actuarial advice. We encourage you to work with other professionals in those specific areas and for those specific matters.

Please also note that many insurance carriers have very strict claim reporting terms and conditions and can include wording that restricts or negates coverage should the carrier not be immediately notified of a potential claim. It is important that you refer to your actual policies for these requirements and follow them closely.

Compensation

For the placement and service of your insurance program, we will receive commission-based compensation from selected insurance companies and/or wholesale intermediaries. The compensation received by us may differ depending on the product and the insurance company. We may receive additional contingent compensation from these insurance companies based upon other aggregate factors, such as claims experience, growth in new business, retention of the business, total premium volume placed, etc. We may also be reimbursed for services rendered under contract with selected premium finance companies that agree to finance your insurance premiums. Any additional fees in lieu of commissions or for services such as claims, loss control and general risk management, will be outlined in the proposal.

Data Protection and Use

We are committed to protecting the privacy of your personal data. In our role as an insurance broker, we may use the data you provided us in the process of securing quotes or coverage, claims management, typical policy servicing, etc. and that data may be provided to various insurance carriers or intermediaries. If you have any specific questions about the use or access to this data, please let us know and we would be happy to discuss it with you.
IMPORTANT DECLARATION AND DISCLOSURE INFORMATION

With respect to your logo(s) and unless otherwise instructed by you, we may, without notice or consent, use your logo(s) and other publicly available information in our marketing efforts and materials with the intent of adding additional clients and growing our business.

Insurance Carrier Rating

If we have provided information in the proposal as to the current rating of an insurance carrier through the AM Best Company, which is an independent rating company, please understand that to the best of our ability we are providing their current rating as of the date of the proposal. However, these ratings are subject to change at any time. Therefore, if the rating of the carrier is important to you or your business, we advise that you check the current rating by accessing their website directly at ambest.com for the most current status and rating of your insurance carrier.
MEMORANDUM

To: Board of Directors

From: Emilio Wagner, Director of Operations

Date: June 28, 2023

Subject: Agenda Item V(b): Friendship House Fencing Contract Award – Action Item

__________________________________________________________________

Background
CAPK was allocated $1,000,000 from a line item in the State of California budget for the fiscal year of 2022-2023 to provide site improvements of sports field lighting and perimeter fencing for the Friendship House Community Center. The grant required that a local government facilitator be involved in the transaction to which the City of Bakersfield agreed. The CAPK Board approved staff to move forward with executing the agreement at the November 30, 2022 meeting and the City drafted the agreement which, was approved by City Council on March 22, 2023.

The scope of the project includes a fully lit sports field, perimeter fencing, and playground safety surfacing. The lighting and playground safety surfacing have been procured and are in progress.

Current Events
A Request for Proposal (RFP) for perimeter fencing was released on May 23rd and as a result, two contractors responded with proposals meeting the required specifications. The proposed selection is based on the lowest bid received.

<table>
<thead>
<tr>
<th>Contractor</th>
<th>Proposal Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Joaquin Fence</td>
<td>$397,640</td>
</tr>
<tr>
<td>Northern United Fence</td>
<td>$403,189.47</td>
</tr>
</tbody>
</table>

Project Budget:
- Available Budget: $1,000,000
- Lighting: $350,000
- Fencing: $397,640
- Surfacing: $85,871
- Remaining: $166,489

Recommendation:
Staff recommends that the Board of Directors authorize the Chief Executive Officer to execute a contract with San Joaquin Fence and any subsequent amendments.

Attachments:
San Joaquin Fence RFP
Northern United Fence RFP
SAN JOAQUIN FENCE
1933 E. CALIFORNIA AVE.
Bakersfield, CA 93307
(661) 322-9700  FAX (661) 322-9600
License # 1095547 DIR # 1000037265

COMMUNITY ACTION PARTNERSHIP OF KERN
RFP NO. FHCC 2023-002
ATTN: BUSINESS SERVICES
DATE: 6/12/2023

TO: C.A.P.K.
ATTN: JEREMY KEELING
RE: FENCE QUOTE/ 2424 MLK BLVD / FRIENDSHIP HOUSE

SAN JOAQUIN FENCE INTENDS TO BID THE FOLLOWING ITEMS.

SCOPE OF WORK

PROVIDE AND INSTALL APPROX. 1290' OF NEW 7' CURVE TOP WROUGHT IRON FENCING WITH 12"X4" CONCRETE CURBING AND ADD ½" #16 EXPANDED METAL ONTO APPROX. 1,050' OF EXISTING WROUGHT IRON FENCING, PAINT COLOR BLACK.

BASE BID: $397,640.00

EXCLUSIONS:
♦ UNDETECTED UNDERGROUND UTILITIES, SPRINKLERS
♦ STAKING & GRADING, LOCK BOXES, LOCKS.

SUBMITTED BY: DEAN CASTRO

ACCEPTED BY BUYER: ________________________________

DUE UPON COMPLETION
*IF PAYING BY CREDIT CARD, A 3% SURCHARGE WILL BE ADDED TO THE TOTAL INVOICE

PREVAILING WAGE
Y ☒ X NO ___
JUNE 14, 2023
TO: COMMUNITY ACTION PARTNERSHIP OF KERN
ATTN: BUSINESS SERVICES
PROJECT: 2424 COTTONWOOD RD BAKERSFIELD CA 93307

JOB DESCRIPTION:
INSTALL APPROX 885’ OF 82” HIGH X 94” WIDE GUARDIAN PANEL, 2” X 2” X 14GA TOP AND BOTTOM RAIL, 1” X 1” X 16 GAUGE POINT ON THE TIP, POST: 3” X 3” X 11GAUGE ALL WROUGHT IRON SQ POST, AND INSTALL EXPANDED METAL STANDARD CARBON STEEL, ½” NO 16 STANDARD, SHEET 65% OPEN AREA AND WILL BE INSTALL WITH SELF TAPPING ¾” X ¾” SCREWS. EXPANDED METAL AND FENCE WILL BE PRIMER AND PAINTED WITH ELEOTROSTATIC. ADDING CONCRETE MOW CRUB ON 885’ 12” WIDE X 4” THICK.

INSTALLING 983’ EXPANDED METAL TO EXISTING WROUGHT IRON FENCE, EXPANDED METAL STANDARD CARBON STEEL ¾” NO.16 STANDARD, SHEET 65% OPEN ARE AND WILL BE ATTACH WITH SELF TAPPING ¾” SCREWS AND WILL BE PRIMER AND PAINTED ELEOTROSTATIC PAINT ONLY, (W.I FENCING AND CONCRETE MOW CURB WILL NOT BE ADDED TO THIS SECTION)

***PREVALEING WAGE APPLY***

OPTION #1 TOTAL BID...$403,189.47

PLEASE SEE ATTACH DRAWING
ALL FENCE MATERIAL WILL BE CARBON STEEL.

EXCLUSIONS: DAMAGES TO ANY UMARKED UTILITIES, NO SUMP FENCE AND CONCRETE MOW STRIP, TEMP FENCE, GRADING AND STAKING OR ANYTHING ELSE NOT DESCRIBE ABOVE.

RAMIRO SANTIVANES/ESTIMATOR
NORTHERN UNITED FENCE
JUNE 14, 2023
TO: COMMUNITY ACTION PARTNERSHIP OF KERN
ATTN: BUSINESS SERVICES
PROJECT: 2424 COTTONWOOD RD BAKERSFIELD CA 93307

JOB DESCRIPTION:
INSTALL APPROX 885’ OF 7FT HIGH X 8FT WIDE AEGIS-II INV PANEL, 1-3/4” X 1-3/4” X 14GA TOP AND BOTTOM RAIL, 1” X 1” X 14 GAUGE POINT ON THE TIP, POST: 3” X 3” X 12GAUGE ALL WROUGHT IRON SQ POST, AND INSTALL EXPANDED METAL STANDARD CARBON STEEL, ½” NO 16 STANDARD, SHEET 65% OPEN AREA AND WILL BE INSTALL WITH SELF TAPPING ¾” X ¾” SCREWS. EXPANDED METAL AND FENCE WILL BE PRIMER AND PAINTED WITH ELETROSTATIC. ADDING CONCRETE MOW CRUB ON 885’ 12” WIDE X 4” THICK.

INSTALLING 983’ EXPANDED METAL TO EXISTING WROUGHT IRON FENCE, EXPANDED METAL STANDARD CARBON STEEL ½” NO.16 STANDARD, SHEET 65% OPEN ARE AND WILL BE ATTACH WITH SELF TAPPING ¾” SCREWS AND WILL BE PRIMER AND PAINTED ELETROSTATIC PAINT ONLY, (W.I FENCING AND CONCRETE MOW CURB WILL NOT BE ADDED TO THIS SECTION)

***PREVAILING WAGE APPLY***

OPTION #2 TOTAL BID...$455,024.85

PLEASE SEE ATTACH DRAWING

EXCLUSIONS: DAMAGES TO ANY UMARKED UTILITIES, NO SUMP FENCE AND CONCRETE MOW STRIP, TEMP FENCE, GRADING AND STAKING OR ANYTHING ELSE NOT DESCRIBE ABOVE.

RAMIRO SANTIVANES/ESTIMATOR
NORTHERN UNITED FENCE
CELL: (661) 873-3422
MEMORANDUM

To: Board of Directors

From: Emilio Wagner, Director of Operations

Date: June 28, 2023

Subject: Agenda Item V(c): 18th Street Design Build Contract Award – Action Item

Background
With the recent approval by the Board of Directors to execute a purchase agreement with the County of Kern for fifty percent ownership of the 1300 18th Street building, staff released a Request for Proposal (RFP) to seek a design-build contractor to complete the necessary tenant improvements. Plans and specifications were completed in-house to solicit proposals for all desired improvements.

Current Events
An RFP to seek a design-build contractor was released on April 26th with proposals due on June 6th. Two contractors submitted fully responsive proposals meeting the required specifications. Meetings were held with both contractors to discuss their proposals and the feasibility of reducing costs as both exceeded the amount staff was comfortable recommending to the Board. The proposals were scored based on the qualifications submitted and their pricing, which followed the scope and plans provided.

<table>
<thead>
<tr>
<th>Contractor</th>
<th>Design Fee</th>
<th>Improvement Cost</th>
<th>Estimated Permit Fees</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Piuser Construction</td>
<td>$78,550</td>
<td>1,800,190</td>
<td>20,265</td>
<td>$1,899,005</td>
</tr>
<tr>
<td>SC Anderson</td>
<td>$357,000</td>
<td>2,993,000</td>
<td>60,000</td>
<td>$3,410,000</td>
</tr>
</tbody>
</table>

Both contractors have the necessary experience and ability to complete the project. Meetings were held with both contractors where concern about the budget was expressed. Both contractors suggested similar areas of potential savings such as reducing lighting modifications, flooring, painting of existing walls, and eliminating movable partition walls. After the meeting, Piuser Construction submitted modifications to their proposal identifying a $454,950 savings from reducing the scope for a total project cost of $1,444,055.
In addition, they offered option B, which would allow for a complete redesign of the layout focusing on CAPK requirements and attempting to bring down the project costs. The design fee would increase to $140,000 by selecting this option. However, early on in design we should begin to see if there will be efficiencies and cost savings which warrant a full redesign, if not the redesign will cease prior to full completion and the cost will be lowered proportionately.

Scoring was conducted using the original proposals to ensure a fair comparison. The summary matrix identifies the deciding factors based on the original proposed cost of the project and the anticipated schedule for completion, with Piuser Construction receiving the most points.

Estimated project completion barring building department review:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Piuser Construction</td>
<td>March 2024</td>
</tr>
<tr>
<td>SC Anderson</td>
<td>July 2024</td>
</tr>
</tbody>
</table>

Staff recommends moving forward with awarding a contract to Piuser Construction where we will work with their architect to redesign the layout and specifications to achieve the goals of CAPK for an efficient team-oriented and comfortable work environment for staff while attempting to reduce the overall project cost. Staff propose to work through the design phase and develop a project cost that will be presented to the Board to issue a notice of proceed for construction.

As for the financial component of the tenant improvements, the overall cost will be attributed to the discretionary fund. These costs will be included in the cost basis for our depreciation, that develops into our use fee for the programs. As such, these costs will be covered by programs as part of their use fee. As we finalize the design and project cost, the value of improvements will be weighted based on the critical nature of the improvements. When the notice to proceed with construction is presented to the Board staff will present all options and provide a detail of discretionary account balances and rate of reimbursement based on the depreciation schedule applied.

**Recommendation:**
Staff recommends that the Board of Directors authorize the Chief Executive Officer to execute the design portion only of a contract with Piuser Construction in an amount not to exceed $140,000.

**Attachments:**
Scoring Summary Matrix
Proposal Piuser Construction
Revised Proposal Piuser Construction
Proposal SC Anderson
<table>
<thead>
<tr>
<th>Factors:</th>
<th>Possible Points</th>
<th>Piuser Construction</th>
<th>SC Anderson</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Prior Experience with a public or community agency on similar projects</td>
<td>15</td>
<td>11.3</td>
<td>15.0</td>
</tr>
<tr>
<td>2) Three (3) References for similar projects</td>
<td>15</td>
<td>15.0</td>
<td>15.0</td>
</tr>
<tr>
<td>3) Contractor's organization, size, structure and capacity.</td>
<td>15</td>
<td>11.7</td>
<td>15.0</td>
</tr>
<tr>
<td>4) Staff qualifications and relevant experience</td>
<td>15</td>
<td>13.3</td>
<td>13.3</td>
</tr>
<tr>
<td>5) Project Schedule</td>
<td>10</td>
<td>10.0</td>
<td>5.3</td>
</tr>
<tr>
<td>6) Design Fee</td>
<td>15</td>
<td>15.0</td>
<td>7.7</td>
</tr>
<tr>
<td>6) Improvement Cost</td>
<td>15</td>
<td>15.0</td>
<td>7.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
<td><strong>91.3</strong></td>
<td><strong>79.0</strong></td>
</tr>
</tbody>
</table>
Community Action Partnership of Kern
Design Build - Tenant Improvement
Construction Services
1300 18th Street, Bakersfield CA

June 6, 2023

Prepared by Piuser Construction
Eric Moser
4117 East Drive
Bakersfield, CA 93308
661-477-5858
eric@piuserconstruction.com
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9. Signed Acknowledgment of RFI  
10. Attachment B Bid Sheet  
11. Vendor Information Sheet  
12. W-9  
13. Additional Terms and Conditions  

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<th>Section</th>
<th>Page</th>
</tr>
</thead>
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<td>PG 2-3</td>
</tr>
<tr>
<td>3. Letter of Recommendations</td>
<td>PG 4-6</td>
</tr>
<tr>
<td>4. Description of Services</td>
<td>PG 7</td>
</tr>
<tr>
<td>5. Plan of Action (Schedule)</td>
<td>PG 8-12</td>
</tr>
<tr>
<td>6. Copy of Contractors License</td>
<td>PG 13</td>
</tr>
<tr>
<td>7. Conflict of Interest</td>
<td>PG 14</td>
</tr>
<tr>
<td>8. Signed Acknowledgment of Clarification</td>
<td>PG 15-16</td>
</tr>
<tr>
<td>9. Signed Acknowledgment of RFI</td>
<td>PG 17-19</td>
</tr>
<tr>
<td>10. Attachment B Bid Sheet</td>
<td>PG 20</td>
</tr>
<tr>
<td>11. Vendor Information Sheet</td>
<td>PG 21</td>
</tr>
<tr>
<td>12. W-9</td>
<td>PG 22</td>
</tr>
<tr>
<td>13. Additional Terms and Conditions</td>
<td>PG 23-26</td>
</tr>
</tbody>
</table>
**1. Cover Letter**

Dear CAPK,

We are thrilled that you are considering Piuser Construction to Design & Build your new office space. We have reviewed the project specifications and are excited about the prospect of working with you.

Attached please find a completed bid proposal for 1300 18th Street. After carefully reviewing the project's specifications, we have broken down the scope, process, cost, and all other expectations to help you make the best hiring decision possible for your project.

The information below is designed to give you a comprehensive overview of Piuser Construction's proposed approach to the management of your project, but of course if you have any questions, you can feel free to contact Eric Moser at eric@piuserconstruction or 661-477-5858 with any questions you may have.

We look forward to hearing from you!

Best,

Eric Moser  
Piuser Construction

**ABOUT US**

Piuser Construction has been in the construction industry for more than 14 years and has built hundreds of projects for clients needs. Based in Bakersfield, Piuser works on projects throughout California. Owner David Piuser has over 20 years of construction experience ranging from laborer through project management to estimating. Our team are all natives of Bakersfield, and strive to bring the dreams of owners, plans of architects, and engineers alike, to reality. We at Piuser Construction believe no job is the same and take the steps needed to meet owners expectations. We align ourselves with experienced and capable consulting engineers, craftspeople, and designers to deliver projects that are both on schedule and beautiful. Our teams combined project experience in Office Tenant Improvement projects will serve to strengthen the design and construction of the CAPK Facility.
2. Qualifications of Staff

David D. Piuser

David is a Bakersfield native and has spent the entirety of his adult life in the construction industry. In 2007 he founded Piuser Construction with only a single employee. In 2013 David joined with Coby Vance to form their partnership in Piuser Construction and together continue their vision to grow the company. In 2017, after 10 years as a ceramic tile and stone subcontractor, David received his class B license that allowed Piuser Construction to not only serve the Central Valley with its subcontracting needs but to also bring their hard work and dedication to the general construction needs of the Central Valley and beyond. David is married to wife Leisa and they have two girls, AnnMarie and Lila.

Eric J. Moser

Eric joined Piuser Construction in 2012 after a decade as a finish carpenter working throughout Southern California. In 2012 Eric received his degree in Construction Management and in 2017 Eric was given the opportunity to become a partner in Piuser Construction. Since that time, Eric has had the honor to help build Piuser Construction into one of the premier general contractors and subcontractors in the Central Valley. Eric’s wife Kristen also works for Piuser Construction as the office manager and they have two children, Hunter and Emery.
Coby Vance

Coby is a second-generation Bakersfield native and graduate of Cal State University Bakersfield in 2004. Coby has worked as a commercial real estate broker since graduating from CSUB and still does to this day. In 2013, Coby partnered with childhood friend David Piuser to form their partnership in Piuser Construction. Coby is married to wife Kathleen Anne and has three boys, Connor, Kael and Klay.

Christopher R. Dunehew

Piuser Construction is excited to introduce the newest addition to our team. Chris comes to us with a wealth of experience in the construction and energy industries. As our lead Project Manager, Chris collaborates closely with our clients and subcontractors to ensure all details big and small lead to a completed project that all involved will be proud to be a part of. Chris guides our clients through planning and pre-construction, course of construction, and project close-out phases. Chris is married to wife Kirsti and has two children, daughter Hadley and son Houston.
To Whom It May Concern,

I am writing to recommend Piuser Construction for additional services with future prospective clients. I have had the pleasure of working directly with Piuser Construction on a number of projects in the past at our building at 4560 California Ave. The scope of work for this project involves the reconstruction of the existing building into offices suites with full TI and full remodel of ground floor bathrooms and lobby entrance. Their work has illustrated attention to detail, quality and safety during the time they were performing work. I found in working with them it is the policy of Piuser Construction to strive for the highest quality of work standards with much of their work being done by their own employee’s. However, when needed scheduling within the construction industry Piuser Construction has been able to effectively meet project schedule requirements as well. Their crew have been able to quickly adapt to schedule changes from other subcontractors to keep the schedule on time and aligned with the overall project schedule. In addition, Piuser Construction has been exceptionally accommodating when dealing with unforeseen conditions and potential change orders.

Please consider them for your construction service needs. I recommend them and look forward to working with them again soon.

Kevin Gonsalves
661-370-0600
To Whom It May Concern:

My name is Richard Barenchi and I am the Director of Operations and Finance for New Advances for People with Disabilities (NAPD).

The intent of this letter is to share my recent experience with Piuser Construction.

About a year ago we started a remodel project at our new administrative/programming building. I worked directly with David and his crew from start to finish. I have found that Piuser Construction has an impeccable work ethic. They paid attention to my concerns and addressed them in a timely manner. If there was an issue, David and his team made sure to communicate the problems and keep me updated on their status. They completed the project in the timeline provided and we are completely satisfied with their workmanship.

I highly recommend them for any project you might need completed.

If you have any questions, feel free to call me on my cell phone 661-496-1852.

Sincerely,

Richard Barenchi
Director of Operations and Finance
To whom it may concern,

Piuser Construction has done multiple tenant improvement jobs for Self Serve Pet Spa over the years. The tenant improvement at our Mount Vernon location was done in 2018 and Flushing Quail location was at the end of last year (2021). David and Eric at Piuser Construction have always been great to deal with on a day-to-day basis during the construction process, they kept us updated on the progress and answered any questions we had. We would use Piuser Construction for any of our future tenant improvement and would highly recommend them to anyone looking for a reliable and honest construction company.

If you have any questions, please feel free to contact me.
David Sidhu
Owner
(661) 588-7858
4. Description Of Services

Piuser Construction can provide comprehensive and professional construction services during all phases of construction. We provide top quality administrative support, project management, quality control, and project closeout services.

We believe that the success of every project we perform starts at the top of our organization. Company owners David Piuser and Eric Moser will be intimately involved from beginning to end. David and Eric bring decades of combined experience in the construction industry. Their role is to ensure that they provide the resources, support, and accountability for project management, administration, subcontractors, and vendors to perform their duties and responsibilities to the highest standards.

Our lead project manager, Chris Dunehew, has significant experience in the private and public sector. His comprehensive understanding of the project ensures that all field management, subcontractors, and vendors are actively managed to ensure the project is delivered on time and on budget.

The Piuser Construction administration team is led by Kristen Moser. Kristen has been with the company for six years and has been responsible for overseeing project administration for hundreds of projects. She will bring all necessary organizational oversight to the project by closely tracking and updating submittals, billings, insurances, contracts, and closeout documents.

A key aspect of the Piuser Construction team is found in our field personnel. We have spent years training and developing a group of construction professionals that are integral in projects of this nature. Our team of installers will be available to self-perform a wide range of construction tasks. This allows us to quickly respond to any issues that arise to keep project progress moving towards completion without waiting on subcontractors. With our craftsmen in place, we are also able to promptly address any changes or additions to project scope that ownership desires with minimal possible negative affect to overall project scheduling.

All our management and administration duties are greatly aided by our use and implementation of Procore Construction Management software as our main tool. Procore provides an easy-to-use hub for ownership, design team, project management, and subcontractors to communicate, track project progress, and perform project administration duties.
### 5. Plan of Action (Schedule)

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Mode</th>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td>CAPK Tenant Improvements</td>
<td>189 days</td>
<td>Mon 7/3/23</td>
<td>Thu 3/21/24</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td>General Conditions</td>
<td>53 days</td>
<td>Mon 7/3/23</td>
<td>Wed 9/13/23</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Receive notice to proceed and sign contract</td>
<td>3 days</td>
<td>Mon 7/3/23</td>
<td>Wed 7/5/23</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Submit bond and insurance documents</td>
<td>2.5 days</td>
<td>Thu 7/6/23</td>
<td>Mon 7/10/23</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Prepare project drawings and specifications</td>
<td>4 wks</td>
<td>Thu 7/6/23</td>
<td>Wed 8/2/23</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Submit drawings and obtain building permits</td>
<td>5 wks</td>
<td>Thu 8/3/23</td>
<td>Wed 9/6/23</td>
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<tr>
<td>6</td>
<td></td>
<td>Prepare and submit project schedule</td>
<td>2 days</td>
<td>Thu 9/7/23</td>
<td>Fri 9/8/23</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>Prepare and submit submittals</td>
<td>5 days</td>
<td>Thu 9/7/23</td>
<td>Wed 9/13/23</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>Prepare and submit schedule of values</td>
<td>2 days</td>
<td>Thu 9/7/23</td>
<td>Fri 9/8/23</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>Course of Construction 2nd Floor / Phase 1</td>
<td>26 days</td>
<td>Thu 9/14/23</td>
<td>Thu 10/23/23</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>Demolition walls, doors, electrical, plumbing, and HVAC</td>
<td>2 wks</td>
<td>Thu 9/14/23</td>
<td>Wed 9/27/23</td>
</tr>
<tr>
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<td>Task Name</td>
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<td>-----------</td>
<td>-----------</td>
<td>------------</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td>Metal Framing</td>
<td>1 wk</td>
<td>Thu 9/28/23</td>
<td>Wed 10/4/23</td>
</tr>
<tr>
<td>12</td>
<td></td>
<td>Rough-In Electrical/Data</td>
<td>2 wks</td>
<td>Thu 10/5/23</td>
<td>Wed 10/18/23</td>
</tr>
<tr>
<td>13</td>
<td></td>
<td>Rough-In Plumbing</td>
<td>1 wk</td>
<td>Thu 10/5/23</td>
<td>Wed 10/11/23</td>
</tr>
<tr>
<td>14</td>
<td></td>
<td>Rough-HVAC</td>
<td>1 wk</td>
<td>Thu 10/5/23</td>
<td>Wed 10/11/23</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>Install Doors</td>
<td>1 wk</td>
<td>Thu 10/5/23</td>
<td>Wed 10/11/23</td>
</tr>
<tr>
<td>16</td>
<td></td>
<td>Install passthrough windows</td>
<td>1 day</td>
<td>Thu 10/5/23</td>
<td>Thu 10/5/23</td>
</tr>
<tr>
<td>17</td>
<td></td>
<td>Install Gypsum Board, Tape &amp; Texture</td>
<td>2 wks</td>
<td>Fri 10/6/23</td>
<td>Thu 10/19/23</td>
</tr>
<tr>
<td>18</td>
<td></td>
<td>Finishes</td>
<td>35 days</td>
<td>Fri 10/20/23</td>
<td>Thu 12/7/23</td>
</tr>
<tr>
<td>19</td>
<td></td>
<td>Paint all walls, hard lids, and stain doors</td>
<td>2 wks</td>
<td>Fri 10/20/23</td>
<td>Thu 11/2/23</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>Install cabinets</td>
<td>2 days</td>
<td>Fri 11/3/23</td>
<td>Mon 11/6/23</td>
</tr>
<tr>
<td>21</td>
<td></td>
<td>Install countertops and FRP</td>
<td>3 days</td>
<td>Tue 11/7/23</td>
<td>Thu 11/9/23</td>
</tr>
<tr>
<td>22</td>
<td></td>
<td>Replace damaged ceiling tiles, repair damaged T-Bar</td>
<td>1 wk</td>
<td>Fri 11/3/23</td>
<td>Thu 11/9/23</td>
</tr>
<tr>
<td>23</td>
<td></td>
<td>Install flooring and base</td>
<td>4 wks</td>
<td>Fri 11/3/23</td>
<td>Thu 11/30/23</td>
</tr>
<tr>
<td>24</td>
<td></td>
<td>Install door hardware</td>
<td>3 days</td>
<td>Fri 11/3/23</td>
<td>Tue 11/7/23</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>Install electrical finishes</td>
<td>1 wk</td>
<td>Fri 12/1/23</td>
<td>Thu 12/7/23</td>
</tr>
<tr>
<td>ID</td>
<td>Task Mode</td>
<td>Task Name</td>
<td>Duration</td>
<td>Start</td>
<td>Finish</td>
</tr>
<tr>
<td>----</td>
<td>------------</td>
<td>-----------</td>
<td>----------</td>
<td>----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>26</td>
<td></td>
<td>Install plumbing finishes</td>
<td>1 day</td>
<td>Fri 1/23</td>
<td>Fri 1/23</td>
</tr>
<tr>
<td>27</td>
<td></td>
<td>Set HVAC trim and test and balance system</td>
<td>3 days</td>
<td>Fri 12/23</td>
<td>Tue 12/5/23</td>
</tr>
<tr>
<td>28</td>
<td></td>
<td>Clean job site and remove all materials</td>
<td>1 day</td>
<td>Wed 12/6/23</td>
<td>Wed 12/6/23</td>
</tr>
<tr>
<td>29</td>
<td></td>
<td>Course of Construction 3rd Floor / Phase 2</td>
<td>26 days</td>
<td>Fri 12/1/23</td>
<td>Fri 1/5/24</td>
</tr>
<tr>
<td>30</td>
<td></td>
<td>Demolition walls, doors, electrical, plumbing, and HVAC</td>
<td>2 wks</td>
<td>Fri 12/1/23</td>
<td>Thu 12/14/23</td>
</tr>
<tr>
<td>31</td>
<td></td>
<td>Metal Framing</td>
<td>1 wk</td>
<td>Fri 12/15/23</td>
<td>Thu 12/21/23</td>
</tr>
<tr>
<td>32</td>
<td></td>
<td>Rough-In Electrical/Data</td>
<td>2 wks</td>
<td>Fri 12/22/23</td>
<td>Thu 1/4/24</td>
</tr>
<tr>
<td>33</td>
<td></td>
<td>Rough-In Plumbing</td>
<td>1 wk</td>
<td>Fri 12/22/23</td>
<td>Thu 12/28/23</td>
</tr>
<tr>
<td>34</td>
<td></td>
<td>Rough-HVAC</td>
<td>1 wk</td>
<td>Fri 12/22/23</td>
<td>Thu 12/28/23</td>
</tr>
<tr>
<td>35</td>
<td></td>
<td>Install Doors</td>
<td>1 wk</td>
<td>Fri 12/22/23</td>
<td>Thu 12/28/23</td>
</tr>
<tr>
<td>36</td>
<td></td>
<td>Install passthrough windows</td>
<td>1 day</td>
<td>Fri 12/22/23</td>
<td>Fri 12/22/23</td>
</tr>
<tr>
<td>37</td>
<td></td>
<td>Install Gypsum Board, Tape &amp; Texture</td>
<td>2 wks</td>
<td>Mon 12/25/23</td>
<td>Fri 1/5/24</td>
</tr>
<tr>
<td>38</td>
<td></td>
<td>Finishes</td>
<td>35 days</td>
<td>Mon 1/8/24</td>
<td>Fri 2/23/24</td>
</tr>
<tr>
<td>39</td>
<td></td>
<td>Paint all walls, hard lids, and stain doors</td>
<td>2 wks</td>
<td>Mon 1/8/24</td>
<td>Fri 1/19/24</td>
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<tr>
<td>ID</td>
<td>Mode</td>
<td>Task Name</td>
<td>Duration</td>
<td>Start</td>
<td>Finish</td>
</tr>
<tr>
<td>----</td>
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<td>-----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>40</td>
<td></td>
<td>Install retractable TV's</td>
<td>2 days</td>
<td>Mon 1/22/24</td>
<td>Tue 1/23/24</td>
</tr>
<tr>
<td>41</td>
<td></td>
<td>Install cabinets</td>
<td>2 days</td>
<td>Wed 1/24/24</td>
<td>Thu 1/25/24</td>
</tr>
<tr>
<td>42</td>
<td></td>
<td>Install countertops and FRP</td>
<td>3 days</td>
<td>Fri 1/26/24</td>
<td>Tue 1/30/24</td>
</tr>
<tr>
<td>43</td>
<td></td>
<td>Replace damaged ceiling tiles, repair damaged T-Bar</td>
<td>1 wk</td>
<td>Mon 1/22/24</td>
<td>Fri 1/26/24</td>
</tr>
<tr>
<td>44</td>
<td></td>
<td>Install flooring and base</td>
<td>4 wks</td>
<td>Mon 1/22/24</td>
<td>Fri 2/16/24</td>
</tr>
<tr>
<td>45</td>
<td></td>
<td>Install door hardware</td>
<td>3 days</td>
<td>Mon 1/22/24</td>
<td>Wed 1/24/24</td>
</tr>
<tr>
<td>46</td>
<td></td>
<td>Install electrical finishes</td>
<td>1 wk</td>
<td>Mon 2/19/24</td>
<td>Fri 2/23/24</td>
</tr>
<tr>
<td>47</td>
<td></td>
<td>Install plumbing finishes</td>
<td>1 day</td>
<td>Mon 2/19/24</td>
<td>Mon 2/19/24</td>
</tr>
<tr>
<td>48</td>
<td></td>
<td>Set HVAC trim and test and balance system</td>
<td>3 days</td>
<td>Mon 2/19/24</td>
<td>Wed 2/21/24</td>
</tr>
<tr>
<td>49</td>
<td></td>
<td>Clean job site and remove all materials</td>
<td>1 day</td>
<td>Thu 2/22/24</td>
<td>Thu 2/22/24</td>
</tr>
<tr>
<td>50</td>
<td></td>
<td>Final Clean-up and Occupancy</td>
<td>5 days</td>
<td>Fri 2/23/24</td>
<td>Thu 2/29/24</td>
</tr>
<tr>
<td>51</td>
<td></td>
<td>Remove debris from building and do final clean-up</td>
<td>4 days</td>
<td>Fri 2/23/24</td>
<td>Wed 2/28/24</td>
</tr>
<tr>
<td>ID</td>
<td>Task Mode</td>
<td>Task Name</td>
<td>Duration</td>
<td>Start</td>
<td>Finish</td>
</tr>
<tr>
<td>----</td>
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<td>-----------------------------------------------</td>
<td>----------</td>
<td>-------------</td>
<td>--------------</td>
</tr>
<tr>
<td>52</td>
<td></td>
<td>Substantial completion date</td>
<td>1 day</td>
<td>Thu 2/29/24</td>
<td>Thu 2/29/24</td>
</tr>
<tr>
<td>53</td>
<td></td>
<td>Complete Final Inspections</td>
<td>3 days</td>
<td>Thu 2/29/24</td>
<td>Mon 3/4/24</td>
</tr>
<tr>
<td>54</td>
<td></td>
<td>Perform architect's inspection</td>
<td>1 day</td>
<td>Thu 2/29/24</td>
<td>Thu 2/29/24</td>
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<tr>
<td>55</td>
<td></td>
<td>Perform local building agency inspection</td>
<td>1 day</td>
<td>Fri 3/1/24</td>
<td>Fri 3/1/24</td>
</tr>
<tr>
<td>56</td>
<td></td>
<td>Perform Fire Marshal's inspection</td>
<td>1 day</td>
<td>Mon 3/4/24</td>
<td>Mon 3/4/24</td>
</tr>
<tr>
<td>57</td>
<td></td>
<td>Complete punch list items from all inspections</td>
<td>2 wks</td>
<td>Tue 3/5/24</td>
<td>Mon 3/18/24</td>
</tr>
<tr>
<td>58</td>
<td></td>
<td>Obtain certificate of occupancy</td>
<td>2 days</td>
<td>Tue 3/19/24</td>
<td>Wed 3/20/24</td>
</tr>
<tr>
<td>59</td>
<td></td>
<td>Issue final completion documents including warranties</td>
<td>1 day</td>
<td>Tue 3/19/24</td>
<td>Tue 3/19/24</td>
</tr>
<tr>
<td>60</td>
<td></td>
<td>Issue final request for payment</td>
<td>1 day</td>
<td>Thu 3/21/24</td>
<td>Thu 3/21/24</td>
</tr>
</tbody>
</table>
6. Contractors License

STATE OF CALIFORNIA

CONTRACTORS STATE LICENSE BOARD

Pursuant to Chapter 9 of Division 3 of the Business and Professions Code
and the Rules and Regulations of the Contractors State License Board,
the Registrar of Contractors does hereby issue this license to:

PIUSER STONE AND TILE INC

License Number 891457

to engage in the business or act in the capacity of a contractor in the following classifications:

C54 - TILE (CERAMIC AND MOSAIC)
B - GENERAL BUILDING CONTRACTOR

Witness my hand and seal this day,

December 16, 2018

Issued February 23, 2007
Reissued March 25, 2014

Marlo Richardson, Board Chair

David R. Fogt, Registrar of Contractors

This license is the property of the Registrar of Contractors,
is not transferable, and shall be returned to the Registrar
upon demand when suspended, revoked, or invalidated
for any reason. It becomes void if not renewed.
7. Conflict of Interest

No potential conflicts of interest have been identified.
1. Section I.B.1 is amended to modify the Closing Date:

**Closing Date:** Proposals must be submitted no later than **2:00 p.m. June 6, 2023.**

2. Section I.C is amended as follows:

It is the responsibility of the Vendor to ensure that CAPK receives the proposals by the date and time specified above. **Late proposals will not be considered. Confirmation of receipt is the sole responsibility of Vendor.** Each Vendor must submit its proposal using the enclosed format in Section II below. If any proposal submitted deviates from the requested proposal format, it may be cause for disqualification. This does not, however, preclude the Vendor from offering value-added alternatives and additional, relevant information in addition to the information requested in the RFP. The alternatives, however, must be fully explained in written form, and must be separately stated as alternatives in both the proposal content and fee proposal.

3. Section C. Expected Timelines is amended as follows:

**Job Walk 2 is Scheduled for 5/23/2023 at 1:30 pm, Job Walk is not mandatory.**

<table>
<thead>
<tr>
<th>Date(s)</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 April 26, 2023</td>
<td>RFP Released to public</td>
</tr>
<tr>
<td>2 May 4, 2023</td>
<td>Job Walk at 9:00 am</td>
</tr>
<tr>
<td>3 May 16, 2023</td>
<td>Due date for Vendor Questions -Please email to <a href="mailto:Procurement@capk.org">Procurement@capk.org</a></td>
</tr>
<tr>
<td>4 May 18, 2023</td>
<td>Responses to Vendor questions emailed to Vendors</td>
</tr>
<tr>
<td>5 May 23, 2023</td>
<td>Job Walk 2 at 1:30 pm</td>
</tr>
<tr>
<td>6 June 6, 2023, by 2:00pm</td>
<td>DUE DATE FOR PROPOSALS FROM VENDORS</td>
</tr>
<tr>
<td>7 June 7 – 14, 2023</td>
<td>Analysis of proposals and interviews if required</td>
</tr>
<tr>
<td>8 July 1, 2023</td>
<td>Execution of contracted services</td>
</tr>
</tbody>
</table>

4. Section IV. Proposal Evaluation is amended as follows:
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prior experience with a public or community agency on similar projects</td>
<td>Points = 15</td>
</tr>
<tr>
<td>2. Three (3) references for similar projects</td>
<td>Points = 15</td>
</tr>
<tr>
<td>3. Contractor’s organization, size, structure and capacity</td>
<td>Points = 15</td>
</tr>
<tr>
<td>4. Staff qualifications and relevant experience</td>
<td>Points = 15</td>
</tr>
<tr>
<td>5. Project Schedule</td>
<td>Points = 10</td>
</tr>
<tr>
<td>6. Design Fee</td>
<td>Points = 10</td>
</tr>
<tr>
<td>7. Improvement Cost</td>
<td>Points = 20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>Points = 100</strong></td>
</tr>
</tbody>
</table>

5. RFP is amended to add Attachment B, Bid Sheet. See attached. Bid sheet shall be completed and returned with proposal.

6. The HVAC system at the building is complex and coordination, review, and system modification shall be completed by the system manager. The maintenance of all systems is completed by ACCO the onsite contact is Eric Zielsdorf, contact ezielsdorf@accoes.com or 755-3275.

Acknowledgment/Receipt of Clarification

Eric J. Moser 06/06/2023
Signature Date

SIGNED ACKNOWLEDGEMENT OF RFI MUST BE SUBMITTED WITH PROPOSAL
**RFI Response**

**ID:** 001  
**Date Sent:** May 18, 2023

**Questions and Responses:**

1. Section I.A of the RFP refers to the Contract Form as a Design-Build contract between CAPK and Design-Builder. This document is not included in the RFP. Please provide a copy of the proposed contract.

   The statement is to identify the parties involved in the future contract. The contract will be shared after selection and language can be negotiated prior to execution.

2. The numbering of the Sections of the RFP does not contain Section III, although Section III is referenced under Section I.C. Is it correct to assume that content of the RFP is complete and the Sections of the RFP are simply misnumbered? If not, please provide the contents of Section III.

   The sections are misnumbered. Section 1.C should reference Section II of the RFP.

3. Under Section III.C, is asking for a description of services to be provided. This information seems to be better defined by CAPK as each respondent to this RFP could potentially offer more/less or different services from other proposers. This would help assure that all proposers are providing the same services.

   Section II.C will take into consideration all services offered by the Contractor to offer a successful project and will be weighted accordingly under Contractor’s organization, size, structure and capacity. For example, such services as, access to a project portal, such as, pro-core, or other relevant services to assist with a successful project.

4. Under Section VI.B - Proposal Evaluation, Item 6. shows 30 points assigned to "Bid". Nowhere in the RFP is there a requirement to submit a "Bid". In fact, the RFP does not ask for fees of any kind. Please define what Item 6 of the scoring matrix is based upon.

   Please refer to clarification 1 attached.

5. Please provide a copy of the sign-in sheet for attendees at the Job Walk conducted May 4, 2023.

   Sign-in sheet is attached.

6. When tearing out the interview room on both sides (North and South) of the 2nd Floor, are the T-Bar ceilings expected to be torn out and reinstalled with new layouts or do the new walls for Rooms 200 - 203 taken to the underside of the T-bar?

   The new walls can be taken to the underside of T-bar.

7. When reinstalling or changing T-bar ceiling system configurations, will all new or repositions lights be LED light fixtures?
All new lighting shall be LED. The contractor shall also provide an alternate cost to replace all existing light fixtures with LED.

8. Will all 2nd Floor and 3rd Floor "horseshoe" fluorescent and compact fluorescent fixtures be replaced with LED light fixtures? Many of the existing fluorescent fixtures have been discontinued or they are hard to find sources that will match the existing fixtures nearly 20 year old.

This shall be included in the alternate to replace all fixtures with LED.

9. In the Board Room, when the partition walls are closed, it does not appear to meet Code exiting requirements. Have the plans provided with the RFP been vetted and reviewed with the County Plan Check staff or Fire Safety Officials for approval, or will the Design/Build team be expected to submit drawings for plan check prior to starting work?

Plans have not been reviewed by building officials for compliance with the Building code. It is the responsibility of the Design-Build Contractor to address any code compliance issues including ADA accessibility.

10. Will the project proposal be subject to Skilled and Trained Workforce, or PCC 2600-2603?

CAPK is a Private non-profit organization using unrestricted funds to complete the improvements outlined in the RFP.

11. Are drawings available in a cad. Format?

Files were produced using Revit and can be exported to dwg, dxf or others as needed.

12. Is there a cabinet color specification?

Colors are to be selected based on samples provided by the selected contractor.

13. Second floor breakroom sink not labeled; assume it is similar to third floor breakroom sink, 22 40 00.A12 S.S. Two Compartment Sink?

The second-floor sink shall be two compartment stainless steel sink.

14. Third floor cabinetry along room 312; lower cabinets require replacement to meet ADA standard, should we replace uppers as well to match other new cabinets?

Upper and lower cabinetry shall be removed, plumbing capped according to code, and walls patched and painted to match adjacent texture and finish.

15. New cubicle power- where is the handoff for power distribution to cubicle towers? (See general note, sheet 104 #5- Open office area will contain cubicle partitions to be design by third party. Power and data for cubicles will be distributed through power poles, to be provided by cubicle company.)

There will be one power pole per six cubicles power shall be ran from electrical from the respective floor to each power pole. The exact location of the power pole is to be determined.

16. Demo existing floor power or is that to be left alone?

Existing floor boxes that extend above the surface are to be replaced with flush floor covers. Power is not required to be active at each.

17. Is there a product number or source for existing modular walls?

CAPK has not been able to identify a source for the wall partitions. CAPK would prefer to re-use the existing partitions where able, there is no expectation to build out all offices with a like system unless contractor finds it more cost-effective to do so.

a. If steel stud and drywall are more cost-effective will this be acceptable?
If it is more cost-effective to build new walls rather than reuse the existing partition system it is up to the contractor’s discretion. Any partitions not used must be safely stored in coordination with CAPK.

18. Sheet 102- general notes- server rooms- are drawings correct? Room 220 and Room 320? Should this be room 319 instead of room 320?

Correct The server rooms are identified as rooms 220 and 319. General note 7 on sheet 104 should notate room 319.

19. For the line set from roof for mini split, where is the roof access?

Please refer to sheet A-2.5 of the original plan set for roof plan of the building. Roof can be accessed from west stairwell. Plans can be downloaded from: Procurement Opportunities - CAPK or https://www.capk.org/business/

a. Is there a specified mounting location?

Mounting location in the room can be either on south, east, or west walls, whatever is more practical. The roof location will need to be coordinated with ACCO.

b. Is there an existing chase to install the line in from top to bottom?

Please review the original plans using the link. According to the plans there does not appear to be a phone room at the fourth floor. The electrical room however is directly above each electrical room for all four floors.

20. Are we to assume that General Notes number 8 and 9 on sheet 104 also apply to sheet 102?

Correct this note was unintentionally omitted from sheet 102. Please apply notes to both sheets.

a. Relocate/add light fixtures as necessary to ensure uniformity and adequate lighting due to removed and added walls.

b. Relocate/add supply and return air ducts as necessary to ensure an efficient HVAC system for all spaces, due to removed and added walls.

21. Has a subsequent job walk been scheduled?

Please see the clarification.

Acknowledgment/Receipt of RFI Response

[Signature] [Date]

SIGNED ACKNOWLEDGEMENT OF RFI MUST BE SUBMITTED WITH PROPOSAL
Offerors will be required to submit with their Proposals with the following fee components:

a. Design Fee $78,550.00
b. Improvement Cost $1,800,190.00
c. Estimated Permit Fees $20,265.00

The Construction Fee shall be based on plans and specifications and all clarifications provided during the RFP process. If after the award and during design any conflicts with the building code that materially alter the design shall be addressed via change order.
## 11. Vendor Information Sheet

**APPENDIX A**

Community Action Partnership of Kern  
*Procurement Department*  
5005 Business Park North, Bakersfield, CA 93309 • 661.336.5236 • FX: 661.322.2237

**VENDOR INFORMATION SHEET**

<table>
<thead>
<tr>
<th>Date</th>
<th>06/06/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared By</td>
<td>Eric Moser</td>
</tr>
<tr>
<td>Official Business Name</td>
<td>Piuser Stone and Tile Inc.</td>
</tr>
<tr>
<td>DBA:</td>
<td>Piuser Construction</td>
</tr>
<tr>
<td>Location Address:</td>
<td>4117 East Dr. Bakersfield CA 93308</td>
</tr>
<tr>
<td>Remit Address:</td>
<td>4117 East Dr. Bakersfield CA 93308</td>
</tr>
<tr>
<td>Contact Person:</td>
<td>David Piuser</td>
</tr>
<tr>
<td>Phone #:</td>
<td>661-201-1908</td>
</tr>
<tr>
<td>Fax #:</td>
<td>N/A</td>
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<tr>
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<td>46-2417274</td>
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<tr>
<td>Federal ID # or SS#:</td>
<td>891457</td>
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<td>24 00132869</td>
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<tr>
<td>Workers Compensation Insurance Carrier &amp; Policy #:</td>
<td>Ace American Insurance Co. #C70004240</td>
</tr>
</tbody>
</table>

**FEDERAL TAX CLASSIFICATION:**
- Individual/Sole Proprietor
- C Corporation
- S Corporation
- Partnership
- Trust/Estate

**BUSINESS ENTITY/CLASSIFICATION:**
- Board Member
- Employee
- Faith Based
- Fed Gov’t
- For Profit
- Housing Collaborative
- Local Gov’t
- Non-Profit
- Parent
- Post Secondary Ed
- Provider
- School District

**SBA CLASSIFICATION:**
- Minority-Owned
- Small Business
- Veteran-Owned
- Woman-Owned

| Years in Business | 16 |
| Accept Purchase Orders: | Yes |

**If your business has a Social Security number as Tax ID, we require the signature of the owner.**

**Authorized Signature: ___________________________**
**Print Name: ___________________________**
**Title: ___________________________**
**Date: ___________________________**

REV. 012516
12. W-9

Form W-9

Request for Taxpayer Identification Number and Certification

Name as shown on your income tax return:

Please Construction

Business name, if different from above:

Please Stone and Tile, Inc

Check appropriate box:

☑ Corporation

☐ Partnership

☐ Limited liability company. Enter the tax classification (D-disregarded entity, C-corporation, P-partnership) □ ... Exempt payee

Print or type:

Address (number, street, and apt. or suite no.)

4117 East Drive

City, state, and zip code

Bakersfield, Ca 93308

List account number(s) here (optional):

Part I

Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see “How to get a TIN on page 3.”

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number

Employer identification number

Part II

Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and I am not subject to backup withholding because:
   a. I am exempt from backup withholding, or
   b. I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or
   c. The IRS has notified me that I am no longer subject to backup withholding, and

2. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here

Signature of U.S. person: 

Kristen Moser

Date: 01/25/2023

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).

2. Certify that you are not subject to backup withholding.

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners’ share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester’s form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,

- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,

- An estate (other than a foreign estate), or

- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners’ share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partner to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,
1. **TAXES.** The Contractor is solely responsible to pay all taxes and comply with all Federal, State, and local laws, ordinances, rules, regulations and lawful orders bearing on the performance of work.

2. **ASSIGNMENT OR SUBCONTRACTING.** The Contractor may not assign or transfer the Agreement, or any interest therein or claim thereunder, or subcontract any portion of the work thereunder, without the prior written approval of CAPK. If CAPK consents to such assignment or transfer, the terms and conditions of the Agreement shall be binding upon any assignee or transferee. Any transfer shall be considered an addendum to the Agreement and must be included as such.

3. **TERMINATION FOR CONVENIENCE OF CAPK.** CAPK may terminate the Agreement at any time by giving written notice to the Contractor of such termination and specifying the effective date thereof. In that event, all finished or unfinished documents and other materials as described herein, at the option of CAPK, shall become its property. If the Agreement is terminated by CAPK as provided herein, the Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents and other materials. The Contractor hereby expressly waives any and all claims for damages or compensation arising under the Agreement except as set forth in this section in the event of such termination.

4. **CHANGES.** CAPK may from time to time, require changes in the scope of the services of the Contractor to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor’s compensation which are mutually agreed upon by and between CAPK and the Vendor, shall be effective when incorporated in written amendments to the Agreement. Amendments shall be valid only after approval by Contractor and CAPK’s Chief Executive Officer.

5. **CLAIMS.** All claims for money due or to become due to the Contractor from CAPK under the Agreement may not be assigned to a bank, trust company, or other financial institution without CAPK approval. Notice or requests of any such assignment or transfer shall be furnished promptly in writing to CAPK.

6. **NOTICE.** Any notice or notices required or permitted to be given pursuant to the Agreement may be personally served on the other party by the party giving such notice, or may be served by certified mail, return receipt requested.

7. **AFFIRMATIVE ACTION.** The Contractor agrees to abide by all State and Federal Affirmative Action policies and laws.

8. **DISPUTE RESOLUTION.** Any dispute arising regarding the interpretation or implementation of the Agreement, including any claims for breach of the Agreement, shall be resolved by submitting the claim for arbitration to the American Arbitration Association in accordance with its rules and procedures applicable to commercial disputes. The location of any arbitration hearing shall be Bakersfield, California, and any enforcement of the arbitrator’s decision shall be brought in the Superior Court of the County of Kern, Bakersfield, California.

9. **EQUAL EMPLOYMENT OPPORTUNITY.** All hiring and other employment practices by the Contractor shall be non-discriminatory, based on merit and qualifications without regard to race, color, religion, national origin, ancestry, disability, medical condition, marital status, age or sex.

10. **SBE/MBE/WBE POLICY STATEMENT.** It is the policy of Community Action
Partnership of Kern, consistent with Federal, State and local laws, to promote and encourage the development, participation, and continued expansion of Small Business Enterprises, Minority Business Enterprises and Women’s Business Enterprises.

11. **AMERICAN MADE.** To the extent practicable, all equipment and products provided by Contractor will be American made.

12. **CONFIDENTIALITY.** The Contractor shall use his or her best efforts to keep confidential any information obtained during the performance of the Agreement.

13. **RESPONSIBILITY.** If Contractor is part of a corporation, the individual or individuals who sign the Agreement on behalf of the corporation are jointly responsible for performance of the Agreement.

14. **PROTEST BY VENDOR:** If the Contractor wishes to file a protest against CAPK for any action, the Contractor must do so in writing with CAPK within 72 hours after the action to be protested has occurred. All protests will be taken under advisement. Any protests received after that will not be recognized.

15. **CONFLICT OF INTEREST:** In accordance with California Public Contract Code 10410, no officer or employee of CAPK shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest in the Agreement, which may be in whole, or in part, sponsored or funded by a Local, State, or Federal agency. Also, no relative of an employee of CAPK may enter into or bid on an Agreement while said employee is still employed by CAPK. No relative of an employee of CAPK may bid on an Agreement until 12 months after the date said employee of CAPK has left employment of CAPK, either voluntarily or involuntarily. It is contrary to CAPK policy for any CAPK employee to personally solicit, demand or receive any gratuity of any kind from a Contractor in connection with any decision affecting a CAPK purchase or Agreement for Goods or Services. Thus, if such a case were to occur, the Contractor may file a protest with CAPK as specified in the section titled “Protest by Contractor.”

16. **DEBARMENT AND SUSPENSION CERTIFICATION:** Contractor, under penalty of perjury, certified that, except as noted below, he/she or any person associated therewith in the capacity of owner, partner, director, officer, manager:
   a. Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;
   b. Has not been suspended, debarred, voluntarily excluded or determined ineligible by any federal agency within the past three (3) years;
   c. Does not have a proposed debarment pending; and
   d. Has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.

If there are any exceptions to the Certifications above, insert the exceptions in the following space:

Exceptions will not necessarily result in denial of award but will be considered in determining Vendor responsibility. For any exception noted above, indicate below to whom it applies, initiating agency, and dates of action. Note: Providing false information may result in criminal prosecution or administrative sanctions.

17. **WORKER’S COMPENSATION:** Labor Code Section 3700 provides:

"Every employer except the State and all political subdivisions or institutions thereof, shall secure the payment of compensation in one or more of the following ways:

"(a) By being insured against liability to pay compensation in one or to more than one of the insurers duly authorized to write compensation insurance in this State."
"(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees."

Contractor is aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for Worker’s Compensation or to undertake self-insurance in accordance with the provisions of that Code, and Vendor will comply with those provisions before commencing the performance of the work of the Agreement.

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part 7, Division 2 of the Labor Code, this certificate must be signed and filed with the awarding body prior to performing any work under the Agreement.)

18. INSURANCE REQUIREMENTS: Contractor shall procure, furnish and maintain for the duration of the Agreement the following types and limits of insurance herein:

a. Automobile Liability Insurance, providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:
   b. Provide coverage for owned, non-owned and hired autos.
   c. Contain an additional insured endorsement in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.
   d. Broad Form Commercial General Liability Insurance, ISO form CG00 01 11 85 or 88 providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:
      e. Provide Contractual Liability coverage for the terms of the Agreement.
      f. Contain an additional insured endorsement in favor in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.
     g. Workers' compensation insurance with statutory limits and employer's liability insurance with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall contain a waiver of subrogation endorsement in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

All policies required of the Contractor shall be primary insurance as to Community Action Partnership of Kern, its board, officers, agents employees and volunteers and any insurance or self-insurance maintained by Community Action Partnership of Kern, its board, officers, agents employees and designated volunteers shall be in excess of the Contractor's insurance and shall not contribute with it. Additional insured endorsement shall use ISO form CG20 10 11 85 (in no event with an edition date later than 1990).

Insurance is to be placed with insurers with a Best’s rating of no less than A: VII. Any deductibles, self-insured retentions or insurance in lesser amounts, or lack of certain types of insurance otherwise required by the Agreement, or insurance rated below Best's A: VII, must be declared prior to execution of the Agreement and approved by CAPK in writing.

All policies shall contain an endorsement providing Community Action Partnership of Kern with thirty (30) days written notice of cancellation or material change in policy language or terms. All policies shall provide that there shall be continuing liability thereon, notwithstanding any recovery on any policy.

The insurance required hereunder shall be maintained until all work required to be
performed by the Agreement is satisfactorily completed. Contractor shall furnish CAPK with a certificate of insurance and required endorsements evidencing the insurance required. CAPK may withdraw its offer of an Agreement or cancel the Agreement if certificates of insurance and endorsements required have not been provided prior to the execution of the Agreement.

___________________________________________
SIGNATURE    DATE

Eric J. Moser  06/06/2023

Eric J. Moser
PRINT NAME

Piuser Construction
COMPANY NAME
Community Action Partnership of Kern
Design Build - Tenant Improvement
Construction Services
1300 18th Street, Bakersfield CA

June 6, 2023

Prepared by Piuser Construction
Eric Moser
4117 East Drive
Bakersfield, CA 93308
661-477-5858
eric@piuserconstruction.com
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Dear CAPK,

We are thrilled that you are considering Piuser Construction to Design & Build your new office space. We have reviewed the project specifications and are excited about the prospect of working with you.

Attached please find a completed bid proposal for 1300 18th Street. After carefully reviewing the project's specifications, we have broken down the scope, process, cost, and all other expectations to help you make the best hiring decision possible for your project.

The information below is designed to give you a comprehensive overview of Piuser Construction's proposed approach to the management of your project, but of course if you have any questions, you can feel free to contact Eric Moser at eric@piuserconstruction or 661-477-5858 with any questions you may have.

We look forward to hearing from you!

Best,

Eric Moser
Piuser Construction

ABOUT US

Piuser Construction has been in the construction industry for more than 14 years and has built hundreds of projects for clients needs. Based in Bakersfield, Piuser works on projects throughout California. Owner David Piuser has over 20 years of construction experience ranging from laborer through project management to estimating. Our team are all natives of Bakersfield, and strive to bring the dreams of owners, plans of architects, and engineers alike, to reality. We at Piuser Construction believe no job is the same and take the steps needed to meet owners expectations. We align ourselves with experienced and capable consulting engineers, craftspeople, and designers to deliver projects that are both on schedule and beautiful. Our teams combined project experience in Office Tenant Improvement projects will serve to strengthen the design and construction of the CAPK Facility.
2. Qualifications of Staff

David D. Piuser

David is a Bakersfield native and has spent the entirety of his adult life in the construction industry. In 2007 he founded Piuser Construction with only a single employee. In 2013 David joined with Coby Vance to form their partnership in Piuser Construction and together continue their vision to grow the company. In 2017, after 10 years as a ceramic tile and stone subcontractor, David received his class B license that allowed Piuser Construction to not only serve the Central Valley with its subcontracting needs but to also bring their hard work and dedication to the general construction needs of the Central Valley and beyond. David is married to wife Leisa and they have two girls, AnnMarie and Lila.

Eric J. Moser

Eric joined Piuser Construction in 2012 after a decade as a finish carpenter working throughout Southern California. In 2012 Eric received his degree in Construction Management and in 2017 Eric was given the opportunity to become a partner in Piuser Construction. Since that time, Eric has had the honor to help build Piuser Construction into one of the premier general contractors and subcontractors in the Central Valley. Eric’s wife Kristen also works for Piuser Construction as the office manager and they have two children, Hunter and Emery.
Coby Vance

Coby is a second-generation Bakersfield native and graduate of Cal State University Bakersfield in 2004. Coby has worked as a commercial real estate broker since graduating from CSUB and still does to this day. In 2013, Coby partnered with childhood friend David Piuser to form their partnership in Piuser Construction. Coby is married to wife Kathleen Anne and has three boys, Connor, Kael and Klay.

Christopher R. Dunehew

Piuser Construction is excited to introduce the newest addition to our team. Chris comes to us with a wealth of experience in the construction and energy industries. As our lead Project Manager, Chris collaborates closely with our clients and subcontractors to ensure all details big and small lead to a completed project that all involved will be proud to be a part of. Chris guides our clients through planning and pre-construction, course of construction, and project close-out phases. Chris is married to wife Kirsti and has two children, daughter Hadley and son Houston.
To Whom It May Concern,

I am writing to recommend Piuser Construction for additional services with future prospective clients. I have had the pleasure of working directly with Piuser Construction on a number of projects in the past at our building at 4560 California Ave. The scope of work for this project involves the reconstruction of the existing building into offices suites with full TI and full remodel of ground floor bathrooms and lobby entrance. Their work has illustrated attention to detail, quality and safety during the time they were performing work. I found in working with them it is the policy of Piuser Construction to strive for the highest quality of work standards with much of their work being done by their own employee’s. However, when needed scheduling within the construction industry Piuser Construction has been able to effectively meet project schedule requirements as well. Their crew have been able to quickly adapt to schedule changes from other subcontractors to keep the schedule on time and aligned with the overall project schedule. In addition, Piuser Construction has been exceptionally accommodating when dealing with unforeseen conditions and potential change orders.

Please consider them for your construction service needs. I recommend them and look forward to working with them again soon.

Kevin Gonsalves
661-370-0600
To Whom It May Concern:

My name is Richard Barenchi and I am the Director of Operations and Finance for New Advances for People with Disabilities (NAPD).

The intent of this letter is to share my recent experience with Piuser Construction.

About a year ago we started a remodel project at our new administrative/programming building. I worked directly with David and his crew from start to finish. I have found that Piuser Construction has an impeccable work ethic. They paid attention to my concerns and addressed them in a timely manner. If there was an issue, David and his team made sure to communicate the problems and keep me updated on their status. They completed the project in the timeline provided and we are completely satisfied with their workmanship.

I highly recommend them for any project you might need completed.

If you have any questions, feel free to call me on my cell phone 661-496-1852.

Sincerely,

Richard Barenchi
Director of Operations and Finance
To whom it may concern,

Piuser Construction has done multiple tenant improvement jobs for Self Serve Pet Spa over the years. The tenant improvement at our Mount Vernon location was done in 2018 and Flushing Quail location was at the end of last year (2021). David and Eric at Piuser Construction have always been great to deal with on a day-to-day basis during the construction process, they kept us updated on the progress and answered any questions we had. We would use Piuser Construction for any of our future tenant improvement and would highly recommend them to anyone looking for a reliable and honest construction company.

If you have any questions, please feel free to contact me.
David Sidhu
Owner
(661) 588-7858
4. Description Of Servies

Piuser Construction can provide comprehensive and professional construction services during all phases of construction. We provide top quality administrative support, project management, quality control, and project closeout services.

We believe that the success of every project we perform starts at the top of our organization. Company owners David Piuser and Eric Moser will be intimately involved from beginning to end. David and Eric bring decades of combined experience in the construction industry. Their role is to ensure that they provide the resources, support, and accountability for project management, administration, subcontractors, and vendors to perform their duties and responsibilities to the highest standards.

Our lead project manager, Chris Dunehew, has significant experience in the private and public sector. His comprehensive understanding of the project ensures that all field management, subcontractors, and vendors are actively managed to ensure the project is delivered on time and on budget.

The Piuser Construction administration team is led by Kristen Moser. Kristen has been with the company for six years and has been responsible for overseeing project administration for hundreds of projects. She will bring all necessary organizational oversight to the project by closely tracking and updating submittals, billings, insurances, contracts, and closeout documents.

A key aspect of the Piuser Construction team is found in our field personnel. We have spent years training and developing a group of construction professionals that are integral in projects of this nature. Our team of installers will be available to self-perform a wide range of construction tasks. This allows us to quickly respond to any issues that arise to keep project progress moving towards completion without waiting on subcontractors. With our craftsmen in place, we are also able to promptly address any changes or additions to project scope that ownership desires with minimal possible negative affect to overall project scheduling.

All our management and administration duties are greatly aided by our use and implementation of Procore Construction Management software as our main tool. Procore provides an easy-to-use hub for ownership, design team, project management, and subcontractors to communicate, track project progress, and perform project administration duties.
## 5. Plan of Action (Schedule)

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Mode</th>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td><strong>CAPK Tenant Improvements</strong></td>
<td>189 days</td>
<td>Mon 7/3/23</td>
<td>Thu 3/21/24</td>
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<tr>
<td>1</td>
<td></td>
<td><strong>General Conditions</strong></td>
<td>53 days</td>
<td>Mon 7/3/23</td>
<td>Wed 9/13/23</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Receive notice to proceed and sign contract</td>
<td>3 days</td>
<td>Mon 7/3/23</td>
<td>Wed 7/5/23</td>
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<tr>
<td>3</td>
<td></td>
<td>Submit bond and insurance documents</td>
<td>2.5 days</td>
<td>Thu 7/6/23</td>
<td>Mon 7/10/23</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Prepare project drawings and specifications</td>
<td>4 wks</td>
<td>Thu 7/6/23</td>
<td>Wed 8/2/23</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Submit drawings and obtain building permits</td>
<td>5 wks</td>
<td>Thu 8/3/23</td>
<td>Wed 9/6/23</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>Prepare and submit project schedule</td>
<td>2 days</td>
<td>Thu 9/7/23</td>
<td>Fri 9/8/23</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>Prepare and submit submittals</td>
<td>5 days</td>
<td>Thu 9/7/23</td>
<td>Wed 9/13/23</td>
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<tr>
<td>8</td>
<td></td>
<td>Prepare and submit schedule of values</td>
<td>2 days</td>
<td>Thu 9/7/23</td>
<td>Fri 9/8/23</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td><strong>Course of Construction 2nd Floor / Phase 1</strong></td>
<td>26 days</td>
<td>Thu 9/14/23</td>
<td>Thu 10/23/23</td>
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<tr>
<td>10</td>
<td></td>
<td>Demolition walls, doors, electrical, plumbing, and HVAC</td>
<td>2 wks</td>
<td>Thu 9/14/23</td>
<td>Wed 9/27/23</td>
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<tr>
<td>11</td>
<td>1</td>
<td>Metal Framing</td>
<td>1 wk</td>
<td>Thu 9/28/23</td>
<td>Wed 10/4/23</td>
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<tr>
<td>12</td>
<td>1</td>
<td>Rough-In Electrical/Data</td>
<td>2 wks</td>
<td>Thu 10/5/23</td>
<td>Wed 10/18/23</td>
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<td>13</td>
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<td>Rough-In Plumbing</td>
<td>1 wk</td>
<td>Thu 10/5/23</td>
<td>Wed 10/11/23</td>
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<td>14</td>
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<td>Rough-HVAC</td>
<td>1 wk</td>
<td>Thu 10/5/23</td>
<td>Wed 10/11/23</td>
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<tr>
<td>15</td>
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<td>Install Doors</td>
<td>1 wk</td>
<td>Thu 10/5/23</td>
<td>Wed 10/11/23</td>
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<tr>
<td>16</td>
<td>1</td>
<td>Install passthrough windows</td>
<td>1 day</td>
<td>Thu 10/5/23</td>
<td>Thu 10/5/23</td>
</tr>
<tr>
<td>17</td>
<td>1</td>
<td>Install Gypsum Board, Tape &amp; Texture</td>
<td>2 wks</td>
<td>Fri 10/6/23</td>
<td>Thu 10/19/23</td>
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<tr>
<td>18</td>
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<td>Finishes</td>
<td>35 days</td>
<td>Fri 10/20/23</td>
<td>Thu 12/7/23</td>
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<tr>
<td>19</td>
<td>1</td>
<td>Paint all walls, hard lids, and stain doors</td>
<td>2 wks</td>
<td>Fri 10/20/23</td>
<td>Thu 11/2/23</td>
</tr>
<tr>
<td>20</td>
<td>1</td>
<td>Install cabinets</td>
<td>2 days</td>
<td>Fri 11/3/23</td>
<td>Mon 11/6/23</td>
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<tr>
<td>21</td>
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<td>Install countertops and FRP</td>
<td>3 days</td>
<td>Tue 11/7/23</td>
<td>Thu 11/9/23</td>
</tr>
<tr>
<td>22</td>
<td>1</td>
<td>Replace damaged ceiling tiles, repair damaged T-Bar</td>
<td>1 wk</td>
<td>Fri 11/3/23</td>
<td>Thu 11/9/23</td>
</tr>
<tr>
<td>23</td>
<td>1</td>
<td>Install flooring and base</td>
<td>4 wks</td>
<td>Fri 11/3/23</td>
<td>Thu 11/30/23</td>
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<tr>
<td>24</td>
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<td>Install door hardware</td>
<td>3 days</td>
<td>Fri 11/3/23</td>
<td>Tue 11/7/23</td>
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<tr>
<td>25</td>
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<td>Install electrical finishes</td>
<td>1 wk</td>
<td>Fri 12/1/23</td>
<td>Thu 12/7/23</td>
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<td>Mode</td>
<td>Task Name</td>
<td>Duration</td>
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<td>Finish</td>
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<tr>
<td>26</td>
<td></td>
<td>Install plumbing finishes</td>
<td>1 day</td>
<td>Fri 12/1/23</td>
<td>Fri 12/1/23</td>
</tr>
<tr>
<td>27</td>
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<td>Set HVAC trim and test and balance system</td>
<td>3 days</td>
<td>Fri 12/1/23</td>
<td>Tue 12/5/23</td>
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<tr>
<td>28</td>
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<td>Clean job site and remove all materials</td>
<td>1 day</td>
<td>Wed 12/6/23</td>
<td>Wed 12/6/23</td>
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<tr>
<td>29</td>
<td></td>
<td>Course of Construction 3rd Floor / Phase 2</td>
<td>26 days</td>
<td>Fri 12/1/23</td>
<td>Fri 1/5/24</td>
</tr>
<tr>
<td>30</td>
<td></td>
<td>Demolition walls, doors, electrical, plumbing, and HVAC</td>
<td>2 wks</td>
<td>Fri 12/1/23</td>
<td>Thu 12/14/23</td>
</tr>
<tr>
<td>31</td>
<td></td>
<td>Metal Framing</td>
<td>1 wk</td>
<td>Fri 12/15/23</td>
<td>Thu 12/21/23</td>
</tr>
<tr>
<td>32</td>
<td></td>
<td>Rough-In Electrical/Data</td>
<td>2 wks</td>
<td>Fri 12/22/23</td>
<td>Thu 1/4/24</td>
</tr>
<tr>
<td>33</td>
<td></td>
<td>Rough-In Plumbing</td>
<td>1 wk</td>
<td>Fri 12/22/23</td>
<td>Thu 12/28/23</td>
</tr>
<tr>
<td>34</td>
<td></td>
<td>Rough-HVAC</td>
<td>1 wk</td>
<td>Fri 12/22/23</td>
<td>Thu 12/28/23</td>
</tr>
<tr>
<td>35</td>
<td></td>
<td>Install Doors</td>
<td>1 wk</td>
<td>Fri 12/22/23</td>
<td>Thu 12/28/23</td>
</tr>
<tr>
<td>36</td>
<td></td>
<td>Install passthrough windows</td>
<td>1 day</td>
<td>Fri 12/22/23</td>
<td>Fri 12/22/23</td>
</tr>
<tr>
<td>37</td>
<td></td>
<td>Install Gypsum Board, Tape &amp; Texture</td>
<td>2 wks</td>
<td>Mon 12/25/23</td>
<td>Fri 1/5/24</td>
</tr>
<tr>
<td>38</td>
<td></td>
<td>Finishes</td>
<td>35 days</td>
<td>Mon 1/8/24</td>
<td>Fri 2/23/24</td>
</tr>
<tr>
<td>39</td>
<td></td>
<td>Paint all walls, hard lids, and stain doors</td>
<td>2 wks</td>
<td>Mon 1/8/24</td>
<td>Fri 1/19/24</td>
</tr>
<tr>
<td>ID</td>
<td>Task Name</td>
<td>Duration</td>
<td>Start</td>
<td>Finish</td>
<td></td>
</tr>
<tr>
<td>----</td>
<td>-----------</td>
<td>----------</td>
<td>-------</td>
<td>--------</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Install retractable TV's</td>
<td>2 days</td>
<td>Mon 1/22/24</td>
<td>Tue 1/23/24</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Install cabinets</td>
<td>2 days</td>
<td>Wed 1/24/24</td>
<td>Thu 1/25/24</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Install countertops and FRP</td>
<td>3 days</td>
<td>Fri 1/26/24</td>
<td>Tue 1/30/24</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>Replace damaged ceiling tiles, repair damaged T-Bar</td>
<td>1 wk</td>
<td>Mon 1/22/24</td>
<td>Fri 1/26/24</td>
<td></td>
</tr>
<tr>
<td>44</td>
<td>Install flooring and base</td>
<td>4 wks</td>
<td>Mon 1/22/24</td>
<td>Fri 2/16/24</td>
<td></td>
</tr>
<tr>
<td>45</td>
<td>Install door hardware</td>
<td>3 days</td>
<td>Mon 1/22/24</td>
<td>Wed 1/24/24</td>
<td></td>
</tr>
<tr>
<td>46</td>
<td>Install electrical finishes</td>
<td>1 wk</td>
<td>Mon 2/19/24</td>
<td>Fri 2/23/24</td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>Install plumbing finishes</td>
<td>1 day</td>
<td>Mon 2/19/24</td>
<td>Mon 2/19/24</td>
<td></td>
</tr>
<tr>
<td>48</td>
<td>Set HVAC trim and test and balance system</td>
<td>3 days</td>
<td>Mon 2/19/24</td>
<td>Wed 2/21/24</td>
<td></td>
</tr>
<tr>
<td>49</td>
<td>Clean job site and remove all materials</td>
<td>1 day</td>
<td>Thu 2/22/24</td>
<td>Thu 2/22/24</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>Final Clean-up and Occupancy</td>
<td>5 days</td>
<td>Fri 2/23/24</td>
<td>Thu 2/29/24</td>
<td></td>
</tr>
<tr>
<td>51</td>
<td>Remove debris from building and do final clean-up</td>
<td>4 days</td>
<td>Fri 2/23/24</td>
<td>Wed 2/28/24</td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>Task Name</td>
<td>Duration</td>
<td>Start</td>
<td>Finish</td>
<td></td>
</tr>
<tr>
<td>----</td>
<td>-----------------------------</td>
<td>----------</td>
<td>-------------</td>
<td>---------------</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Substantial completion</td>
<td>1 day</td>
<td>Thu 2/29/24</td>
<td>Thu 2/29/24</td>
<td></td>
</tr>
<tr>
<td>53</td>
<td>Complete Final Inspections</td>
<td>3 days</td>
<td>Thu 2/29/24</td>
<td>Mon 3/4/24</td>
<td></td>
</tr>
<tr>
<td>54</td>
<td>Perform architect's inspection</td>
<td>1 day</td>
<td>Thu 2/29/24</td>
<td>Thu 2/29/24</td>
<td></td>
</tr>
<tr>
<td>55</td>
<td>Perform local building agency inspection</td>
<td>1 day</td>
<td>Fri 3/1/24</td>
<td>Fri 3/1/24</td>
<td></td>
</tr>
<tr>
<td>56</td>
<td>Perform Fire Marshal's inspection</td>
<td>1 day</td>
<td>Mon 3/4/24</td>
<td>Mon 3/4/24</td>
<td></td>
</tr>
<tr>
<td>57</td>
<td>Complete punch list items from all inspections</td>
<td>2 wks</td>
<td>Tue 3/5/24</td>
<td>Mon 3/18/24</td>
<td></td>
</tr>
<tr>
<td>58</td>
<td>Obtain certificate of occupancy</td>
<td>2 days</td>
<td>Tue 3/19/24</td>
<td>Wed 3/20/24</td>
<td></td>
</tr>
<tr>
<td>59</td>
<td>Issue final completion documents including warranties</td>
<td>1 day</td>
<td>Tue 3/19/24</td>
<td>Tue 3/19/24</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>Issue final request for payment</td>
<td>1 day</td>
<td>Thu 3/21/24</td>
<td>Thu 3/21/24</td>
<td></td>
</tr>
</tbody>
</table>
6. Contractors License

[Image of Contractors State License Board certificate]

STATE OF CALIFORNIA

CONTRACTORS STATE LICENSE BOARD

Pursuant to Chapter 9 of Division 3 of the Business and Professions Code
and the Rules and Regulations of the Contractors State License Board,
the Registrar of Contractors does hereby issue this license to:

PIUSER STONE AND TILE INC

License Number 891457

to engage in the business or act in the capacity of a contractor in the following classifications:

C54 - TILE (CERAMIC AND MOSAIC)
B - GENERAL BUILDING CONTRACTOR

Witness my hand and seal this day,

December 16, 2018

Issued February 23, 2007
Reissued March 25, 2014

Marlo Richardson, Board Chair

David R. Fogt, Registrar of Contractors

This license is the property of the Registrar of Contractors,
is not transferable, and shall be returned to the Registrar upon demand when suspended, revoked, or invalidated
for any reason. It becomes void if not renewed.
7. Conflict of Interest

No potential conflicts of interest have been identified.
8. Signed Acknowledgement of Clarification

Project: Design Build – Tenant Improvements
Subject: Amendment to RFP
Sent Via: Email

1. Section I.B.1 is amended to modify the Closing Date:

**Closing Date:** Proposals must be submitted no later than **2:00 p.m. June 6, 2023.**

2. Section I.C is amended as follows:

It is the responsibility of the Vendor to ensure that CAPK receives the proposals by the date and time specified above. **Late proposals will not be considered. Confirmation of receipt is the sole responsibility of Vendor.** Each Vendor must submit its proposal using the enclosed format in Section II below. If any proposal submitted deviates from the requested proposal format, it may be cause for disqualification. This does not, however, preclude the Vendor from offering value-added alternatives and additional, relevant information in addition to the information requested in the RFP. The alternatives, however, must be fully explained in written form, and must be separately stated as alternatives in both the proposal content and fee proposal.

3. Section C. Expected Timelines is amended as follows:

**Job Walk 2 is Scheduled for 5/23/2023 at 1:30 pm, Job Walk is not mandatory.**

<table>
<thead>
<tr>
<th>Date(s)</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 April 26, 2023</td>
<td>RFP Released to public</td>
</tr>
<tr>
<td>2 May 4, 2023</td>
<td>Job Walk at 9:00 am</td>
</tr>
<tr>
<td>3 May 16, 2023</td>
<td>Due date for Vendor Questions -Please email to <a href="mailto:Procurement@capk.org">Procurement@capk.org</a></td>
</tr>
<tr>
<td>4 May 18, 2023</td>
<td>Responses to Vendor questions emailed to Vendors</td>
</tr>
<tr>
<td>5 May 23, 2023</td>
<td>Job Walk 2 at 1:30 pm</td>
</tr>
<tr>
<td>6 June 6, 2023, by 2:00 pm</td>
<td><strong>DUE DATE FOR PROPOSALS FROM VENDORS</strong></td>
</tr>
<tr>
<td>7 June 7 – 14, 2023</td>
<td>Analysis of proposals and interviews if required</td>
</tr>
<tr>
<td>8 July 1, 2023</td>
<td>Execution of contracted services</td>
</tr>
</tbody>
</table>
1. Prior experience with a public or community agency on similar projects | Points = 15 
2. Three (3) references for similar projects | Points = 15 
3. Contractor’s organization, size, structure and capacity | Points = 15 
4. Staff qualifications and relevant experience | Points = 15 
5. Project Schedule | Points = 10 
6. Design Fee | Points = 10 
7. Improvement Cost | Points = 20 

Total | Points = 100

5. RFP is amended to add Attachment B, Bid Sheet. See attached. Bid sheet shall be completed and returned with proposal.

6. The HVAC system at the building is complex and coordination, review, and system modification shall be completed by the system manager. The maintenance of all systems is completed by ACCO the onsite contact is Eric Zielsdorf, contact ezielsdorf@accoes.com or 755-3275.

Acknowledgment/Receipt of Clarification

Eric J. Moser 06/06/2023
Signature Date

**SIGNED ACKNOWLEDGEMENT OF RFI MUST BE SUBMITTED WITH PROPOSAL**
9. Signed Acknowledgement of RFI

RFP Response
ID: 001
Date Sent: May 18, 2023

Project: Design Build – Tenant Improvements
Subject: Questions Regarding RFP OPS 2023-001
Sent Via: Email

Questions and Responses:

1. Section I.A of the RFP refers to the Contract Form as a Design-Build contract between CAPK and Design-Builder. This document is not included in the RFP. Please provide a copy of the proposed contract.

   The statement is to identify the parties involved in the future contract. The contract will be shared after selection and language can be negotiated prior to execution.

2. The numbering of the Sections of the RFP does not contain Section III, although Section III is referenced under Section I.C. Is it correct to assume that content of the RFP is complete and the Sections of the RFP are simply misnumbered? If not, please provide the contents of Section III.

   The sections are misnumbered. Section 1.C should reference Section II of the RFP.

3. Under Section III.C, is asking for a description of services to be provided. This information seems to be better defined by CAPK as each respondent to this RFP could potentially offer more/less or different services from other proposers. This would help assure that all proposers are providing the same services.

   Section II.C will take into consideration all services offered by the Contractor to offer a successful project and will be weighted accordingly under Contractor’s organization, size, structure and capacity. For example, such services as, access to a project portal, such as, pro-core, or other relevant services to assist with a successful project.

4. Under Section VI.B - Proposal Evaluation, Item 6. shows 30 points assigned to “Bid”. Nowhere in the RFP is there a requirement to submit a "Bid". Nowhere in the RFP is it correct to assume that content of the RFP is complete and the Sections of the RFP are simply misnumbered? If not, please provide the contents of Section III.

   Please refer to clarification 1 attached.

5. Please provide a copy of the sign-in sheet for attendees at the Job Walk conducted May 4, 2023.

   Sign-in sheet is attached.

6. When tearing out the interview room on both sides (North and South) of the 2nd Floor, are the T-Bar ceilings expected to be torn out and reinstalled with new layouts or do the new walls for Rooms 200 - 203 taken to the underside of the T-bar?

   The new walls can be taken to the underside of T-bar.

7. When reinstalling or changing T-bar ceiling system configurations, will all new or repositions lights be LED light fixtures?
All new lighting shall be LED. The contractor shall also provide an alternate cost to replace all existing light fixtures with LED.

8. Will all 2nd Floor and 3rd Floor "horseshoe" fluorescent and compact fluorescent fixtures be replaced with LED light fixtures? Many of the existing fluorescent fixtures have been discontinued or they are hard to find sources that will match the existing fixtures nearly 20 year old.

This shall be included in the alternate to replace all fixtures with LED.

9. In the Board Room, when the partition walls are closed, it does not appear to meet Code exiting requirements. Have the plans provided with the RFP been vetted and reviewed with the County Plan Check staff or Fire Safety Officials for approval, or will the Design/Build team be expected to submit drawings for plan check prior to starting work?

Plans have not been reviewed by building officials for compliance with the Building code. It is the responsibility of the Design-Build Contractor to address any code compliance issues including ADA accessibility.

10. Will the project proposal be subject to Skilled and Trained Workforce, or PCC 2600-2603?

CAPK is a Private non-profit organization using unrestricted funds to complete the improvements outlined in the RFP.

11. Are drawings available in a cad. Format?

Files were produced using Revit and can be exported to dwg, dxf or others as needed.

12. Is there a cabinet color specification?

Colors are to be selected based on samples provided by the selected contractor.

13. Second floor breakroom sink not labeled; assume it is similar to third floor breakroom sink, 22 40 00.A12 S.S. Two Compartment Sink?

The second-floor sink shall be two compartment stainless steel sink.

14. Third floor cabinetry along room 312; lower cabinets require replacement to meet ADA standard, should we replace uppers as well to match other new cabinets?

Upper and lower cabinetry shall be removed, plumbing capped according to code, and walls patched and painted to match adjacent texture and finish.

15. New cubicle power- where is the handoff for power distribution to cubicle towers? (See general note, sheet 104 #5- Open office area will contain cubicle partitions to be design by third party. Power and data for cubicles will be distributed through power poles, to be provided by cubicle company.)

There will be one power pole per six cubicles power shall be ran from electrical from the respective floor to each power pole. The exact location of the power pole is to be determined.

16. Demo existing floor power or is that to be left alone?

Existing floor boxes that extend above the surface are to be replaced with flush floor covers. Power is not required to be active at each.

17. Is there a product number or source for existing modular walls?

CAPK has not been able to identify a source for the wall partitions. CAPK would prefer to re-use the existing partitions where able, there is no expectation to build out all offices with a like system unless contractor finds it more cost-effective to do so.

a. If steel stud and drywall are more cost-effective will this be acceptable?
If it is more cost-effective to build new walls rather than reuse the existing partition system it is up to the contractor’s discretion. Any partitions not used must be safely stored in coordination with CAPK.

18. Sheet 102- general notes- server rooms- are drawings correct? Room 220 and Room 320? Should this be room 319 instead of room 320?
   
   Correct The server rooms are identified as rooms 220 and 319. General note 7 on sheet 104 should notate room 319.

19. For the line set from roof for mini split, where is the roof access?
   
   Please refer to sheet A-2.5 of the original plan set for roof plan of the building. Roof can be accessed from west stairwell. Plans can be downloaded from: Procurement Opportunities - CAPK or https://www.capk.org/business/
   
   a. Is there a specified mounting location?
      
      Mounting location in the room can be either on south, east, or west walls, whatever is more practical. The roof location will need to be coordinated with ACCO.
   
   b. Is there an existing chase to install the line in from top to bottom?
      
      Please review the original plans using the link. According to the plans there does not appear to be a phone room at the fourth floor. The electrical room however is directly above each electrical room for all four floors.

20. Are we to assume that General Notes number 8 and 9 on sheet 104 also apply to sheet 102?
   
   Correct this note was unintentionally omitted from sheet 102. Please apply notes to both sheets.
   
   a. Relocate/add light fixtures as necessary to ensure uniformity and adequate lighting due to removed and added walls.
   
   b. Relocate/add supply and return air ducts as necessary to ensure an efficient HVAC system for all spaces, due to removed and added walls.

21. Has a subsequent job walk been scheduled?
   
   Please see the clarification.

Acknowledgment/Receipt of RFI Response

[Signature] 06/06/2023
Signature  Date

SIGNED ACKNOWLEDGEMENT OF RFI MUST BE SUBMITTED WITH PROPOSAL
Offerors will be required to submit with their Proposals with the following fee components:

a. Design Fee $78,550.00
b. Improvement Cost $1,800,190.00
c. Estimated Permit Fees $20,265.00

The Construction Fee shall be based on plans and specifications and all clarifications provided during the RFP process. If after the award and during design any conflicts with the building code that materially alter the design shall be addressed via change order.

Value Engineered Options

Option A: VE Options with current layout / specifications

1. Delete LVP flooring, use only carpet tile
2. Delete retractable TV system @ Board Room. Wall mount TV's
3. No new lighting, use existing lights and layout
4. Paint only new walls, touch up existing walls
5. Delete movable partition wall @ Board Room

Original Improvement Cost: $1,800,190.00
Total Savings From Improvement Cost: ($454,950)
Revised Improvement Cost: $1,345,240.00
Total Revised Cost: $1,444,055.00

Option B: Redesign layout / specifications

- This option includes an increase in design fees. This option will involve a full redesign of layout and specifications with a focus on fulfilling CAPK requirements while staying within the desired $1 million budget.
## Vendor Information Sheet

**Official Business Name:** Piuser Stone and Tile Inc.

**Location Address:**
- **Street:** 4117 East Dr.
- **City:** Bakersfield
- **State:** CA
- **Zip:** 93308

**Remit Address:**
- **Street:** 4117 East Dr.
- **City:** Bakersfield
- **State:** CA
- **Zip:** 93308

**Contact Person:** David Piuser

**Title:** President

**Phone #:** 661-201-1908

**Fax #:** N/A

**CAPK Vendor #:** 46-2417274

**Federal ID # or SS#:** 891457

**Contractor Lic #:** 24 00132869

**General Liability Insurance Carrier & Policy #:** Liberty Mutual #BKS2258370461

**Auto Liability Insurance Carrier & Policy #:** Liberty Mutual #BKS2258370461

**Workers Compensation Insurance Carrier & Policy #:** Ace American Insurance Co. #C70004240

**FEDERAL TAX CLASSIFICATION:**
- X C Corporation

**BUSINESS ENTITY/CLASSIFICATION:**
- X For Profit

**SBA CLASSIFICATION:**
- Minority-Owned

**Years in Business:** 16

**Accept Purchase Orders:** X Yes

**Authorized Signature:**

**Print Name:**

**Date:**

---

Community Action Partnership of Kern

RFP OPS-2023-001

Bid Proposal

PG 21

288
12. W-9

**Request for Taxpayer Identification Number and Certification**

**Name** (as shown on your income tax return)

*Piuser Construction*

Business name, if different from above

*Piuser Stone and Tile, Inc*

**Check appropriate box**: 
- [ ] Individual/Sole proprietor
- [X] Corporation
- [ ] Partnership
- [ ] Limited liability company. Enter the tax classification (D-disregarded entity, C-corporation, P-partnership) ▶ ………
- [ ] Exempt payee

**Print or type**: 
- [ ] Other (see instructions) ▶

**Address number, street, and apt. or suite no.**

4117 East Drive

City, state, and ZIP code

Bakersfield, CA 93308

**List account number(s) here (optional)**

**Part I - Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

**Note**: If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

**Part II - Certification**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report ALL interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions**: You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

**Sign Here**

Signature of U.S. person ▶ \Kristen Moser\ Date ▶ 01/25/2023

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners’ share of effectively connected income.

**Note**: If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester’s form if it is substantially similar to this Form W-9.

**Definition of a U.S. person**: For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships**: Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners’ share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,
13. Additional Terms and Conditions

APPENDIX C

Community Action Partnership of Kern
Additional Terms and Conditions

1. TAXES. The Contractor is solely responsible to pay all taxes and comply with all Federal, State, and local laws, ordinances, rules, regulations and lawful orders bearing on the performance of work.

2. ASSIGNMENT OR SUBCONTRACTING. The Contractor may not assign or transfer the Agreement, or any interest therein or claim thereunder, or subcontract any portion of the work thereunder, without the prior written approval of CAPK. If CAPK consents to such assignment or transfer, the terms and conditions of the Agreement shall be binding upon any assignee or transferee. Any transfer shall be considered an addendum to the Agreement and must be included as such.

3. TERMINATION FOR CONVENIENCE OF CAPK. CAPK may terminate the Agreement at any time by giving written notice to the Contractor of such termination and specifying the effective date thereof. In that event, all finished or unfinished documents and other materials as described herein, at the option of CAPK, shall become its property. If the Agreement is terminated by CAPK as provided herein, the Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents and other materials. The Contractor hereby expressly waives any and all claims for damages or compensation arising under the Agreement except as set forth in this section in the event of such termination.

4. CHANGES. CAPK may from time to time, require changes in the scope of the services of the Contractor to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor’s compensation which are mutually agreed upon by and between CAPK and the Vendor, shall be effective when incorporated in written amendments to the Agreement. Amendments shall be valid only after approval by Contractor and CAPK’s Chief Executive Officer.

5. CLAIMS. All claims for money due or to become due to the Contractor from CAPK under the Agreement may not be assigned to a bank, trust company, or other financial institution without CAPK approval. Notice or requests of any such assignment or transfer shall be furnished promptly in writing to CAPK.

6. NOTICE. Any notice or notices required or permitted to be given pursuant to the Agreement may be personally served on the other party by the party giving such notice, or may be served by certified mail, return receipt requested.

7. AFFIRMATIVE ACTION. The Contractor agrees to abide by all State and Federal Affirmative Action policies and laws.

8. DISPUTE RESOLUTION. Any dispute arising regarding the interpretation or implementation of the Agreement, including any claims for breach of the Agreement, shall be resolved by submitting the claim for arbitration to the American Arbitration Association in accordance with its rules and procedures applicable to commercial disputes. The location of any arbitration hearing shall be Bakersfield, California, and any enforcement of the arbitrator’s decision shall be brought in the Superior Court of the County of Kern, Bakersfield, California.

9. EQUAL EMPLOYMENT OPPORTUNITY. All hiring and other employment practices by the Contractor shall be non-discriminatory, based on merit and qualifications without regard to race, color, religion, national origin, ancestry, disability, medical condition, marital status, age or sex.

10. SBE/MBE/WBE POLICY STATEMENT. It is the policy of Community Action
Partnership of Kern, consistent with Federal, State and local laws, to promote and encourage the development, participation, and continued expansion of Small Business Enterprises, Minority Business Enterprises and Women’s Business Enterprises.

11. **AMERICAN MADE.** To the extent practicable, all equipment and products provided by Contractor will be American made.

12. **CONFIDENTIALITY.** The Contractor shall use his or her best efforts to keep confidential any information obtained during the performance of the Agreement.

13. **RESPONSIBILITY.** If Contractor is part of a corporation, the individual or individuals who sign the Agreement on behalf of the corporation are jointly responsible for performance of the Agreement.

14. **PROTEST BY VENDOR:** If the Contractor wishes to file a protest against CAPK for any action, the Contractor must do so in writing with CAPK within 72 hours after the action to be protested has occurred. All protests will be taken under advisement. Any protests received after that will not be recognized.

15. **CONFLICT OF INTEREST:** In accordance with California Public Contract Code 10410, no officer or employee of CAPK shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest in the Agreement, which may be in whole, or in part, sponsored or funded by a Local, State, or Federal agency. Also, no relative of an employee of CAPK may enter into or bid on an Agreement while said employee is still employed by CAPK. No relative of an employee of CAPK may bid on an Agreement until 12 months after the date said employee of CAPK has left employment of CAPK, either voluntarily or involuntarily. It is contrary to CAPK policy for any CAPK employee to personally solicit, demand or receive any gratuity of any kind from a Contractor in connection with any decision affecting a CAPK purchase or Agreement for Goods or Services. Thus, if such a case were to occur, the Contractor may file a protest with CAPK as specified in the section titled “Protest by Contractor.”

16. **DEBARMENT AND SUSPENSION CERTIFICATION:** Contractor, under penalty of perjury, certified that, except as noted below, he/she or any person associated therewith in the capacity of owner, partner, director, officer, manager:

   a. Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;
   
   b. Has not been suspended, debarred, voluntarily excluded or determined ineligible by any federal agency within the past three (3) years;
   
   c. Does not have a proposed debarment pending; and
   
   d. Has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.

If there are any exceptions to the Certifications above, insert the exceptions in the following space:

Exceptions will not necessarily result in denial of award but will be considered in determining Vendor responsibility. For any exception noted above, indicate below to whom it applies, initiating agency, and dates of action. Note: Providing false information may result in criminal prosecution or administrative sanctions.

17. **WORKER’S COMPENSATION:** Labor Code Section 3700 provides:

   “Every employer except the State and all political subdivisions or institutions thereof, shall secure the payment of compensation in one or more of the following ways:

   "(a) By being insured against liability to pay compensation in one or to more than one of the insurers duly authorized to write compensation insurance in this State."
"(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees."

Contractor is aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for Worker’s Compensation or to undertake self-insurance in accordance with the provisions of that Code, and Vendor will comply with those provisions before commencing the performance of the work of the Agreement.

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part 7, Division 2 of the Labor Code, this certificate must be signed and filed with the awarding body prior to performing any work under the Agreement.)

18. INSURANCE REQUIREMENTS: Contractor shall procure, furnish and maintain for the duration of the Agreement the following types and limits of insurance herein:

a. Automobile Liability Insurance, providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:

b. Provide coverage for owned, non-owned and hired autos.

c. Contain an additional insured endorsement in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

d. Broad Form Commercial General Liability Insurance, ISO form CG00 01 11 85 or 88 providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:

e. Provide Contractual Liability coverage for the terms of the Agreement.

f. Contain an additional insured endorsement in favor in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

g. Workers’ compensation insurance with statutory limits and employer’s liability insurance with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall contain a waiver of subrogation endorsement in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

All policies required of the Contractor shall be primary insurance as to Community Action Partnership of Kern, its board, officers, agents employees and volunteers and any insurance or self-insurance maintained by Community Action Partnership of Kern, its board, officers, agents employees and designated volunteers shall be in excess of the Contractor’s insurance and shall not contribute with it. Additional insured endorsement shall use ISO form CG20 10 11 85 (in no event with an edition date later than 1990).

Insurance is to be placed with insurers with a Best’s rating of no less than A: VII. Any deductibles, self-insured retentions or insurance in lesser amounts, or lack of certain types of insurance otherwise required by the Agreement, or insurance rated below Best’s A: VII, must be declared prior to execution of the Agreement and approved by CAPK in writing.

All policies shall contain an endorsement providing Community Action Partnership of Kern with thirty (30) days written notice of cancellation or material change in policy language or terms. All policies shall provide that there shall be continuing liability thereon, notwithstanding any recovery on any policy.

The insurance required hereunder shall be maintained until all work required to be
performed by the Agreement is satisfactorily completed.
Contractor shall furnish CAPK with a certificate of insurance and required endorsements evidencing the insurance required. CAPK may withdraw its offer of an Agreement or cancel the Agreement if certificates of insurance and endorsements required have not been provided prior to the execution of the Agreement.

Eric J. Moser
06/06/2023
SIGNATURE    DATE

Eric J. Moser
PRINT NAME

Piuser Construction
COMPANY NAME
Tab 1  Cover Letter
Tab 2  Company Profile
Tab 3  Key Personnel
Tab 4  Tenant Improvement Experience
Tab 5  Team Design Building Experience
Tab 6  Services & Project Approach
Tab 7  Project Schedule
Tab 8  Design Consultants
Tab 9  Conflict of Interest
Tab 10  Vendor Information Sheet
Tab 11  W9
Tab 12  Additional Terms and Conditions
Tab 13  Attachment B – Bid Sheet
Tab 14  Addendum & RFI
Acknowledgements
June 6, 2023

Community Action Partnership of Kern (CAPK)
RFP OPS 2023-001
Attn: Business Services
5005 Business Park North
Bakersfield, Ca 93309

Subject: Request for Proposals – Design Build – Tenant Improvements
1300 18th Street

To whom it may concern,

Thank you for the opportunity to submit our design build proposal for Community Action Partnership of Kern County. We have thoroughly reviewed and understand the elements of your Request for Proposals and have prepared our submittal to specifically address the information you requested. S.C. Anderson, Inc. acknowledges Addendum No. 1 as well as the Clarification No.1 dated May 18, 2023.

S.C. Anderson, Inc. is a California Corporation established May 26, 1983. Over the past forty years, we have provided construction management, design build, lease-leaseback and general construction services a variety of clientele and for all types of construction projects. From ground-up to remodels, modernizations and tenant improvements. Our company completed the construction on the County of Kern Forensic Science Laboratory and District Attorney Family Support Office. This project was overseen by Mark Russell, AIA as the County Architect. Mr. Russell is currently the Principal Architect with Radian Design Group so our team will have the knowledge and expertise on this building both in the design familiarity as well as the construction. SCA/RDG has developed a proven relationship with mutual respect, communication and efficiencies for working together. We feel that our successful collaborative team experience will bring the absolute best value to the for the Community Action Partnership of Kern County’s design build tenant improvement project.

S.C. Anderson, Inc. has assembled a team of highly qualified individuals. Our project team will be led by Paul Burzych, Senior Vice President Estimating, and will be assigned as your Preconstruction Services Manager with support from our estimating department and Lon Gentry, Senior Vice President Operations. Our design team includes Mark Russell, AIA as the Principal Architect, Luke Casavant serving as the Project Architect complimented by Bianca Martinez, Project Manager and Elsa Contreras as our interior designer.

Upon review of our response, we are confident you will recognize the distinct benefits the S.C. Anderson, Inc. / Radian Design Group team will bring to Community Action Partnership of Kern County. We look forward to being your Design Builder and stand ready to meet with you to personally discuss our project approach and qualifications. Please feel free to contact me at our main office at (661)392-7000.

Very truly yours,

S.C. ANDERSON, INC.

[Signature]

Leigh Ann Anderson
Chief Executive Officer

S.C. ANDERSON INC.
P.O. Box 20489 Bakersfield, CA 93390 (661) 392-7000 (661) 391-9999 Fax
DECEMBER 1997 – The construction of the new County of Kern County District Attorney Forensic Crime Laboratory was completed in historical downtown Bakersfield. Not only did S.C. Anderson, Inc. complete the construction of the multistory building, 4 story parking structure but also completed all tenant improvements. Mark Russell with Radian Design Group, Inc was serving as the County of Kern Architect overseeing the design, shell construction and tenant improvements. This project included 108,000 square feet of Class A office building and an attached 4-story parking structure. A 22,000 square foot FBI certified forensics laboratory highlights this design/build project. S.C. Anderson, Inc. was responsible to ensure that the design for this project was performed within the owner’s budget. Through an active estimating and value engineering program, $1,000,000 in cost savings were generated during the design phase.

Our team will take the mystery out of your design process by utilizing the original team members that oversaw the design and constructed the facility. Not only will we pull from the experience of the original team, but our firm has also been involved with the maintenance for the building for the past 25 years.

Founded in 1983, S.C. Anderson, Inc. has grown into one of Central California’s largest construction service companies. Our extensive experience in providing design build, construction management, lease-leaseback and general construction services for various facilities has prepared S.C. Anderson, Inc. to successfully provide the construction services contemplated by any project owner.

Starting with the design phase, our team will work along with the CAPK staff and the design team to develop a strategic master plan. Budget development, constructability reviews and value engineering will be completed to allow your firm to enhance your existing facilities while remaining within the necessary budgetary conditions. Our experienced construction team will keep your project running smoothly and on schedule.

The advantages of utilizing S.C. Anderson, Inc. includes our exceptional construction experience, a record of outstanding performance, an understanding of what is important to a project owner, and a seasoned team of professionals that know your building and will be dedicated to your project from a conceptual idea to a facility ready to open and serve our community.
Radian Design Group, Inc. is a design firm with a focus on architecture, planning and design/build services. The firm's design portfolio is diverse, ranging from healthcare, religious, commercial office and governmental facilities such as fire stations, libraries, courtroom and administrative buildings.

Since Radian Design Group, Inc. was established in 2011, the growing firm has assembled a highly experienced and creative Architecture, Planning and Design/Build team which has over 60 years in the practice of Architecture. RDG has made a concerted effort to develop a balanced team of experienced licensed architects infused with young talent that bring new technological and rendering expertise to the firm to enhance the quality of the design services we offer to our Clients. The firm’s staff has created a portfolio of projects where over 85% of our workload is being performed for return clients. Radian Design Group continues to diversify the type of projects we pursue to provide an ever-deepening experience profile for our staff which translates to better overall services for our clients.

COHESIVE DESIGN BUILD TEAM
The S.C. Anderson, Inc. – Radian Design Group understands and embraces the goal of an integrated project team. We recognize the important benefit of collaboratively working together to create a better-designed, executed and built facility.

Our team has worked together on several projects and have developed mutual respect, communication, and efficiencies. We have found that an initial jointly developed work plan/schedule identifying required milestones and individual tasks helps to ensure meeting your project and schedule requirements.

The entire team will be focused on maintaining budget and quality of the project. Each team member (architect, engineer, consultant, and contractor) brings an important piece to achieving goals for budget and quality. Radian Design Group understands that the contractor alone cannot be responsible for the budget. The design team needs to review design concepts with the contractor and develop creative solid solutions that meet the client needs and budget. Likewise, the quality of documents is a joint effort involving the input and review from the contractor.
Community Action Partnership of Kern
1300 18th Street Proposal

LEIGH ANN ANDERSON
CHIEF EXECUTIVE OFFICER
Leigh Ann Anderson’s many years of management experience makes her uniquely qualified to direct the day-to-day corporate office activities and function as the corporation’s Human Resource Director. She has overseen several S.C. Anderson, Inc.’s building projects and is actively involved with the financial and marketing efforts of the firm.

STEVEN C. ANDERSON
PRESIDENT
Mr. Anderson is a 50-year construction industry veteran. Prior to establishing S.C. Anderson, Inc., he was Vice President, Operations for R.G. Fisher Constructors where he managed several projects up to $217 million in size. Mr. Anderson has overseen several large development and building projects for the firm and is personally involved in the oversight of all major S.C. Anderson projects.

STEVEN S. ANDERSON
CHIEF OPERATING OFFICER
Mr. Steven Anderson is one of our Senior Project Managers and has over 30 years of construction industry experience. Serving as Chief Operating Officer, Steven oversees all operational aspects of our company including the procuring, bidding, and administration of our construction projects. Steven’s on-site construction experience includes the preconstruction and design/build services for the $14.5 million Kern County District Attorney Family Support and Forensic Science Facility and the $10,000,000 Kern County Public Health Facility.

PAUL BURZYCZ
SENIOR VICE PRESIDENT, ESTIMATING
With 30 years of estimating experience, Mr. Burzycz oversees all budgeting, preliminary estimating, and bidding activities. He also works with the business development department in developing sales leads by preparing conceptual estimates based on preliminary designs.

LON GENTRY
SR. VICE PRESIDENT, OPERATIONS
Mr. Gentry brings over 30 years of experience to our executive team and has overseen the completion of several projects in public works, commercial, office, and tenant improvements with emphasis on complex or accelerated schedules. His duties include the oversight of all design/build, negotiated and general projects. Lon has direct involvement with the Owner beginning with the project startup phase and continuing through construction, ensuring conformance to the company’s standards for quality and schedule compliance.

S.C. ANDERSON, INC. / RADIAN DESIGN GROUP, INC.
MARK RUSSELL  
PRINCIPAL ARCHITECT
Mr. Russell has directed the design efforts for Radian Design Group, Inc. (RDG) since it was formed in 2011. With over 35 years of experience as an architect, he has been responsible for the development of some of Central Valley and Bakersfield’s most prominent buildings. Currently he directs the design efforts of the Firm with a diverse range of projects including Hospital, Church, Office Buildings, Retail Centers and Public Facilities to Multifamily and Single-Family Residential Projects including zero net energy projects primarily in California.

Previous architectural design and development experience included nearly eighteen years as the County Architect for Kern County and the Construction Services Division Manager with support staff of 22 licensed architects, engineers and inspectors including 4 OSHPD inspectors.

His firm has completed design work for major corporate clients such as IBM, ARCO, Occidental Petroleum, Chevron and Unocal in addition to numerous public clients including School Districts, Cities and Counties throughout California. Projects designed by his firm exceeded $250,000,000 in construction value over a thirteen-year period including ten public works projects for the County of Kern prior to being invited to take the position of County Architect.

LUKE CASAVANT  
PROJECT ARCHITECT
Project Architect with over 10 years as an Architect and 18 years total experience overseeing all aspects from the preliminary design process through Construction Administration. Luke has prepared project documentation and supervised construction on over 100 K-12 and Higher Education projects throughout the San Joaquin Valley. Other accomplishments include his ability to work with school districts as well as being the Architect of Record to multiple school projects simultaneously.

BIANCA MARTINEZ  
PROJECT MANAGER
An emerging design associate with experience in various aspects of Architectural Design services. Primary roles and responsibilities include project coordination, design concept documentation and construction drawing preparation. Actively pursuing her passion for Architectural design, Bianca is consistently a valuable contributor to the processes of quality design concepts of the firm. Ultimate professional goal is Architectural licensure.

ELSA CONTRERAS  
DESIGN ASSOCIATE
A seasoned professional with experience in various aspects of Architectural Design services. She will attend client meetings, assist both principal and senior architect on daily project tasks. Extensive experience with Contract Administration phase, in house interior designer. Extensive experience in color and finish selection. Work with our consultants and coordinate tasks to keep projects moving. Assist architects oversee projects. Work with city/ county officials to get permits. Currently pursuing architectural licensure.

S.C. ANDERSON, INC. / RADIAN DESIGN GROUP, INC.
S.C. Anderson, Inc., has completed over 100,000 square feet of tenant improvements including some projects that utilized ultra-wall components. Listed below are a few of those projects.

**CALIFORNIA RESOURCES CORPORATION 9600 MING AVENUE**
S.C. Anderson, Inc. just recently completed the tenant improvements for CRC in their new location. This project included 27,500 sq. ft tenant improvement in 3 phases on 3 floors. Construction of new office spaces, conference rooms, and associated work areas within the existing space. Electrical and signal improvements, and upgrades to millwork and finishes throughout. Code required site improvements including new concrete sidewalks, landscaping and asphalt paving with striping and signage.

**PARSONS ENGINEERING 9600 MING AVENUE**
Also completed in the 9600 Ming Avenue office building were the tenant improvements for Parsons Engineering. This project included 5,650 sq. ft tenant improvement on the 3rd floor of an existing building with new office spaces, conference rooms and open office areas. Electrical and signal improvements. New millwork, flooring, acoustical ceilings and lighting.

**BUILDING X OCCIDENTAL PETROLEUM**
S.C. Anderson, Inc. completed this 27,500-square-foot Class A professional office development. The office was designed in a classic style to complement the adjacent lifestyle center, The Shops at River Walk. The building itself is wrapped and laminated with brick veneer and elegant stonework. A grand archway with glass canopies and select keystones greets employees at the entry, while other amenities such as a plaza and fountain are strategically positioned to give reprieve from the high temperatures common in the area.

Included with the shell construction were the interior tenant improvements for Occidental Petroleum. Office spaces with demountable walls as well as a state of the art, computer network data center with halon fire suppression system.

**BUILDING X MULTI-TENANT**
In 2019 after the relocation of California Resources Corporation, S.C. Anderson, Inc. completed tenant improvements on the second floor for our new home office. The first floor tenant improvements were also completed for 3 separate tenants on the first floor.
BUILDING Y
CALIFORNIA RESOURCES CORPORATION
S.C. Anderson, Inc. completed this design/build project with Milazzo & Associates for a new 3-story 50,000 square foot Class A professional office building in the Riverwalk Corporate Complex. Tenant improvements throughout the 50,000 square foot building were completed for California Resources Corporation.

BUILDING Y
BERRY PETROLEUM
In 2020 after the relocation of California Resources Corporation, S.C. Anderson, Inc. completed additional tenant improvements for the 50,000 square foot building for the new tenant, Berry Petroleum.

OCCIDENTAL PETROLEUM
RIVERWALK BUILDING J
S.C. Anderson, Inc. completed this 2-story – 41,000 square foot, Class A professional building for Castle & Cooke Commercial. Construction included the related site work and interior tenant improvements for Occidental Petroleum.

CORPORATE CENTER A
OCCIDENTAL PETROLEUM
S.C. Anderson, Inc. completed the construction of this 46,000 square foot new 2-story Class A professional office building for Castle & Cooke Commercial. Tenant improvements for the entire building were also completed for Occidental Petroleum and Fresno Pacific University.

CORPORATE CENTER A
CALGEM
In 2020, new tenant improvements throughout the building were completed for the new tenant, CalGEM.

SANTA FE OFFICE BUILDING
S.C. Anderson, Inc. completed the 53,000 square foot Santa Fe Energy building shell as well as all of the tenant improvements utilizing the design/build services.
COUNTY OF KERN CRIME LAB
FORENSIC SCIENCE LABORATORY
DISTRICT ATTORNEY FAMILY SUPPORT OFFICES
The Kern County District Attorney Forensic Crime Laboratory was constructed in historical downtown Bakersfield. This project included 108,000 square feet of Class A office building and an attached 4-story parking structure. A 22,000 square foot FBI certified forensics laboratory highlights this design/build project.

S.C. Anderson, Inc. was responsible to ensure that the design for this project was performed within the owner's budget. Through an active estimating and value engineering program, $1,000,000 in cost savings was generated during the design phase.

COUNTY OF KERN – PUBLIC HEALTH
Mark Russell, AIA was lead designer and Principal architect in charge of the project and S.C. Anderson, Inc., this award winning three story, 60,000 square foot facility replaced the existing Health Department facility built in 1950 and is located on a challenging narrow strip of property on the Kern Medical Center Campus in Bakersfield, California. The Facility consolidated staff from three separate facilities to serve the Public Health needs of all Kern County.

County Health clinic space, a major training/conference center and the Birth and Death record keeping offices occupy the first floor. The second floor provides Nursing program and Public Health eligibility staff space while the third floor contains a state-of-the-art laboratory facility for testing water and infectious specimens. The Public Health Library, Computer/IT staff workspace and Public Health Officer’s administrative suite is also located on the third floor. The building is designed to exceed current energy standards by using low “E” glass and exterior insulation walls assemblies. The building has microwave links for communication with the rest of southern San Joaquin valley in case of major disasters such as earthquakes, floods or biohazardous emergencies occur.
S.C. Anderson Inc. is starting our 41st year in business and have completed more than 1,000 projects over the past 4 decades. Included in this brochure are just a few of the projects that our team worked hand in hand with Radian Design Group as well as Mark Russell, AIA. Additional project experience can be supplied upon request.

BENCHMARK COURT

Designed by Radian Design Group, Inc. and under construction by S.C. Anderson, Inc., this site consisting of three buildings. Building C, a 23,700 square foot, concrete tilt-up, warehouse building. Designed with the potential to be divided into two smaller warehouses. The interior height of the building is set at 29'-0" to provide the space needed for excess storage. 4'-0" square Velux skylights to provide natural light in the storage areas of the warehouse space. The roof structure was designed to eliminate the need of built-up crickets. All drains flow towards the north of the building. The roof is a 60 mil TPO single ply roofing membrane.
EAGLE OAKS 
SHOPPING CENTER

Radian Design Group is the design architect for the Eagle Oaks Shopping Center and S.C. Anderson, Inc. the contractor on this new 11-acre retail center in the burgeoning area of Southwest Bakersfield. Design responsibilities include master planning the site, developing all shell architecture at preliminary and final phases of design, construction and tenant improvements when a tenant doesn’t have a corporate architect previously retained.
ST. CHARLES BORROMEO CATHOLIC CHURCH

Another design build project by S.C. Anderson, Inc. and Radian Design Group for the Diocese of Fresno. The design and construction of the largest church the Catholic Church and in North America. This project includes a 25,000 square foot church with a seating capacity of 3,200 parishioners. The church will serve 16,000 families, the second fastest growing church population in the Country. A wide variety of materials from around the world have been procured and incorporated into the design and construction of this project despite the pandemic and constraints within the supply chain in the past few years.
WILLIAM M. THOMAS
MEADOWS FIELD AIRPORT

Mark Russell, AIA was responsible for working with the Airport Department to develop the Architect RFP, coordinating the selection of the A&E Team and ultimately working with the selected architect, Odell Architects from Richmond Virginia to develop and construct their design in accordance with the Meadows Field Airport Layout Plan (ALP) approved by the FAA. S.C. Anderson, Inc. built the 64,000 square foot three story airport terminal with elevators, escalators, full baggage carousel services and rental car services opened in February 2006. The facility has approximately 800 short/long term public parking spaces with 150 Rental Car Parking stalls and lower level parking for 60 employees.
COUNTY OF KERN PUBLIC HEALTH CENTER

Mark Russell, AIA was lead designer and Principal architect in charge of the project and S.C. Anderson, Inc., this award winning three story, 60,000 square foot facility replaced the existing Health Department facility built in 1950 and is located on a challenging narrow strip of property on the Kern Medical Center Campus in Bakersfield, California. The Facility consolidated staff from three separate facilities to serve the Public Health needs of all Kern County. County Health clinic space, a major training/conference center and the Birth and Death record keeping offices occupy the first floor. The second floor provides Nursing program and Public Health eligibility staff space while the third floor contains a state-of-the-art laboratory facility for testing water and infectious specimens. The Public Health Library, Computer/IT staff workspace and Public Health Officer’s administrative suite is also located on the third floor. The building is designed to exceed current energy standards by using low “E” glass and exterior insulation walls assemblies. The building has microwave links for communication with the rest of southern San Joaquin valley in case of major disasters such as earthquakes, floods or biohazardous emergencies occur.
COUNTY OF KERN INFORMATION TECHNOLOGY BUILDING

Another design completed by Mark Russell, AIA and built by S.C. Anderson, Inc., the Kern County’s new 27,000 square foot Information Technology Services building which relocated the previous IT facility to its new headquarters. This was also one of Mark Russell’s final projects as County Architect. This building is home to a data center, electrical rooms, computer labs, data operations, warehouse, administration and other support areas. It is also integrated with the existing County Emergency Operations Center which handles emergency dispatch operations (911) as well as the County’s communication facility.
ST ELIZABETH ANN SETON CATHOLIC CHURCH

The S.C. Anderson, Inc. / Radian Design Group completed this design build Catholic Church for the Roman Catholic Diocese of Fresno. This project included a 22,255 s.f. sanctuary building which included a 720-seat worship center, classrooms, meeting and office space, childcare nursery and kitchen. Master planning allows for future campus building additions including a larger worship center and other support facilities. Site improvements included a circular entrance drive with fountain, landscaping and parking.
APPROACH TO PROJECT MANAGEMENT AND THE USE OF INTEGRATED DESIGN AND BUILD PROCESS

The time necessary to construct the facility is challenging so an accelerated first phase of design will assist in avoiding cost increases from subcontractor bids due to required acceleration of their specific scopes of work.

This joint architect/General Contractor effort will pay dividends in allowing us to expedite and even initiate site related construction activities before the construction documents are finalized by the architect/engineering team. Clearly, the traditional Design/Bid/Build process would add time to an already tight schedule making this project a perfect fit for the Design/Build approach.

SC Anderson, Inc. and Mark Russell, AIA have had that relationship on projects that they have worked together on for nearly 30 years. We continue to discuss this project daily from a design Build perspective – that is how important it is to us.

We have already jointly developed a timeline for design and construction activities and this schedule will be refined once we integrate the time required to interact with the Owner and Users for this Distribution Center.

APPROACH TO INVOLVING THE OWNERS AND USERS

A fundamental premise of design-build as a delivery method is the fostering of a cooperative team effort on the part of the CAPK, the design professionals and the construction team to achieve the common goals of the project as established by your group. This is especially important to meet your desires and expectations for inclusion in the design and construction process. S.C. Anderson, Inc. and Radian Design Group, Inc. have worked together with other clients to create opportunities for input, review and inclusion.

CLIENT COMMUNICATION

The CAPK’s project’s success will be greatly influence by communication and common project goals. S.C. Anderson, Inc. and Radian Design Group would propose that we clearly define our lines of communication and that we facilitate common project goals.

Principal Communication between CAPK will be through our Sr. Vice President, Paul Burzych. This communication will be supported by Mark Russell, Project Architect during the design process. Despite the inclusion of additional support staff, Paul Burzych will remain the main point of contact during design and preconstruction for this project. At the time construction starts, our Sr Vice President of Operations, Mr. Lon Gentry will take the lead.

Equally important to lines of communication is developing understanding and trust. The design build process does not typically allow for this process to develop naturally over time. Therefore, we would recommend that the major decision makers for CAPK and SCA/RDG team participate in facilitated project goal development session. This enhances the communication and trust from the project inception and facilitates common goals and respect for each team member.

PROACTIVE MANAGEMENT

Proactive management is a way of life for the entire S.C. Anderson, Inc. / Radian Design Group Inc. We do not wait for problems to surface before taking action. We actively look ahead for any issues that have a possibility of becoming problems in the future. And, like good teammates, we look ahead at what is coming up in our teammates areas of responsibility in order to make suggestions that could help avoid a problem. Being proactive is more than just
an attitude; it is also a reflection of our experience.

**DESIGN PROCESS**
The CAPK design build proposal process has allowed us the opportunity to review the initial design and construction of the building. We feel that this knowledge will allow the project to progress in an informative and effective process. Of course, the more immediate review will facilitate the schedule, document development and potential cost impacts.

We suggest that CAPK schedule a meeting for document review immediately following selection of the successful proposer. The focus of this meeting will be to facilitate the client’s understanding and review of the proposal documents. This meeting should be an open two way communication, where both parties come to understand and strive to meet their respective project goals.

**PRECONSTRUCTION SERVICES**
Once we are given the Notice to Proceed, our team will commence with design and pre-construction services by meeting with your project team and stakeholders to finalize the project program, design goals, budget, site logistics and schedule. After the meeting, a Project Construction Plan will be written which will minimally outline: 1) project organization, 2) roles and responsibilities, 3) project milestone dates, 4) authority of team members, 5) management information systems and required reports, and 6) meeting topics, frequency and locations.

To help you visualize concepts and potential innovations for your new facility, Radian Design Group will employ conceptual sketches, and photographic examples. In learning about different technologies and design options, the stakeholders can begin to form and prioritize their visions by seeing what they like and sometimes more importantly, what they don’t like about other buildings.

Different stakeholders in the project may all have different concepts of what the building should be. By conducting design charrette meetings, Radian Design Group will gain insight by having open brainstorming sessions with CAPK.

**CONFIRMING THE PROJECT BUDGET**
The key to a successful project cost control plan is to identify potential cost overruns and value engineering opportunities early in the design process. This allows the Architect and Engineers time to make changes in the design when modifications or alterations are easier, and the realization of cost savings is most significant. The Collaborative Design-Build delivery method allows the Owner to develop an effective Project Team inclusive of the Architect, Design Builder, and your staff early in the design process. Traditional bid / build projects do not offer this type of flexibility.

S.C. Anderson, Inc.’s estimating team actively engages in competitive bid, design build and lease/lease back projects for our general contracting division. This activity allows our estimating staff to be updated daily on the current market trends and trade contractor pricing for the San Joaquin Valley. Our experience with the local subcontracting community allows our estimating team to prepare accurate construction estimates based on local market conditions.

Our estimating staff will develop cost estimates at the conceptual phase, schematic design, design development, 50% construction documents and 90% construction documents phases. These estimates will be formatted in 16 CSI divisions and will be compared to the concept cost plan to ensure that the project design meets the budget constraints.
VALUE ENGINEERING
S. C. Anderson, Inc. will work with your representatives and Radian's design team to evaluate the use of construction materials, equipment, finishes, building systems, and construction methods that are most cost effective or affordable. In the analysis, consideration will be given to current technology, cost, durability, long-term performance, and life-cycle costs. All value engineering and life-cycle cost recommendations will be accompanied by an estimate and written explanation of the long-term maintenance considerations.

SCHEDULING & PHASING
The schedule is a living document that is subject to change as unexpected events and/or sequencing change. The original planning and major milestones should not change, but there is value in SC Anderson, Inc. controlling the schedule. This allows the team to change and adjust to meet the milestones as needed.

QUALITY CONTROL DURING DESIGN PHASE
We understand and embrace the importance of quality Construction Documents and Construction Administration services. Quality Construction Documents provide a better bid process, less expensive construction bids, fewer construction delays and significantly fewer change orders. This process is equally important to the design build process. We have developed a process to incorporate Quality Assurance into our design and review process.

CONSTRUCTABILITY REVIEWS - A major component of pre-construction services includes a constructability review of the design documents. This review focuses primarily on the quality and the overall completeness of the drawings and specifications. The review ensures that the scope of the work is clearly defined in the eyes of the construction contractors and is consistent and coordinated between the different disciplines of the work. We also verify that the project is constructible, that the requirements of the project are clearly described in terms that the trade contractors will easily interpret, and that the construction work can be coordinated and built within the required time constraints. Design items of concern will be categorized by issues involving design corrections, design clarifications, proposed design changes and design coordination issues.

UTILITY ANALYSIS
SCA's project team will work closely with the design team to identify, coordinate and confirm the locations of any required utilities to assure service to the site. Additionally, in the field during the preconstruction services phase, our staff will make a thorough evaluation of the existing conditions including locating existing utilities that will be intercepted or moved as a result of the new construction. This analysis will include review of all available as-built documentation for the location, interviews with the facilities / maintenance personnel, where necessary by our field staff. Accurate location and depth identification of utility services to be extended to the new facility will be confirmed. Existing utility obstructions must also be clearly documented and included in the bidding documents. This investment will assist in controlling costs during the bidding period and mitigate delays or hindrances during the construction phase.

CONSTRUCTION ADMINISTRATION
Owner review/comments and rapid inclusion is not limited to the design process. It is possible that the council may need to make revisions to construction documents during construction. Once again, the success of this will be dependent of open communication and common understanding of the project goals. SCA/RDG will conduct weekly council meetings focusing on current construction
updates, but also making the owner aware of upcoming issues/decisions. This will provide the council a final opportunity to review and influence the final construction. In addition to these meetings, we will provide specific council review meetings with critical subcontractors/building systems. This will include mechanical systems, theatrical systems, building controls, technology, etc.

BID PACKAGES / DIVISION OF WORK AMONG SUBCONTRACTORS
S. C. Anderson, Inc.'s staff will review the design documents and develop detailed scopes of work for each trade involved. The bid packages will define specific work tasks to be performed by each trade contractor, as well as list the items to be excluded from the work. Each bidder will have the option to bid on one or more bid packages for the project. Advertising and bidding the project utilizing a bid package format will level the playing field between the bidders and preclude contractors from submitting partial or incomplete bids.

The manner in which the projects are broken down into bid packages can also affect the level of contractor participation in the bidding process. Bid packages containing scopes of work that are too large, too complex or contain work elements that are not commonly associated with the work of a specific trade may discourage potential bidders from submitting a proposal for the project. A careful analysis of the design documents is necessary to ensure all associated work elements, both listed in the plans and implied, have been accounted for.

PREQUALIFYING SUBCONTRACTORS
S. C. Anderson, Inc. will begin soliciting subtrade bidder interest early in the design phase. Project advertising will include the distribution and collection of subtrade prequalification questionnaires. Our project goal is to prequalify several subtrades for each major scope of work. All prequalification efforts will be performed utilizing forms accepted by the owner.

BID DATE SELECTION
Bid date selection can also impact the level of responsiveness from trade contractors in the market. A thorough review of projects being advertised to bid in the geographical area will be made prior to selecting a final bid date for the project. Sufficient time will be allowed after the initial advertising of the project to ensure all potential bidders have adequate time to obtain and review a complete set of bid documents.

COMPETITIVE TRADE CONTRACTOR BIDDING
Increasing the market competition and number of bids received during the subtrade bidding phase has a direct relation to the final construction cost of any construction project. Statistics show that the higher number of sub trades proposals received on a project directly correlates to reduced construction cost. One of our management team's primary responsibilities is to market the project effectively throughout the local region to maximize bidder interest in the project. In order develop sufficient market competition S. C. Anderson, Inc. will target receiving a several qualified sub-trade bidders for each advertised bid package for the project.

LOCAL PARTICIPATION
The first steps in developing an outreach program are to define the term “Local Participation” and establish a measurable goal to meet, or exceed, during the course of the project. Our firm prefers to view local participation from a “dollar spend” viewpoint within a specific geographical boundary. Maximizing the total economic impact of a project within a specific community encompasses not only the local qualified subcontractor base, but also local laborers, tradesmen, manufacturing, material...
purchasing, distributors, temporary services, equipment rental agencies as well as management and administrative personnel.

Our Estimating and Project Management staff is also tasked to follow-up with all individuals interested in proposing on the project. Our experienced staff will ensure these firms have access to the construction documents, bid addenda and answer any questions that may come up while their proposals are being prepared.

A comprehensive marketing campaign in the community is also required to inform potential participants of the opportunities the project has to offer. This marketing and advertising campaign will utilize local publications, trade associations, Internet services and community workshops to educate the local economic community of the specific opportunities available.

RECEIVE BIDS
At the date and time specified in the bid documents, we will receive and open all bids received for the project. After the bid opening, our team will log all bid results and thoroughly check each bid to determine if the bid is complete, verify contractor's licensing status of each bidder and verify other required bid documentation such as bonds or affidavits. A post bid questionnaire will be issued to the low bidder for each bid category to request references, supplier information, litigation history and current work in progress. If necessary S.C. Anderson, Inc. will conduct post bid interviews to clarify any potential financial, performance or capacity concerns regarding the bidder's participation in the project. Once the bid documents and bidder qualifications have been reviewed, S.C. Anderson, Inc. will develop a recommendation for award of subcontracts based on lowest price by a qualified contractor.

TAB 6 – SERVICES & PROJECT APPROACH

PROJECT MANAGEMENT INFORMATION SYSTEMS

BLUEBEAM
Technology in the construction industry continues to advance each year. S.C. Anderson, Inc. has adopted the field use of software developed by Bluebeam Revu to update, organize and distribute the building design drawings during the construction process, in real time. This technology allows for all parties, including the trade contractors to access the most current construction drawings, clarifications and revisions. Revu allows us to create, edit, markup and collaborate our PDF documents utilizing our Office programs. We are able to create text-searchable documents and track all annotations made during collaboration. At project completion we are able to create digital files of all correspondence and emails for easy access and search capabilities.

For construction documentation we are able to generate and post Requests for Information, Addenda and Supplemental Information documents to the drawings and add a document link at the location on the drawings for easy access by our Project Staff. We are able to coordinate and collaborate with the Architect, our Project Staff and our subcontractors using Bluebeam Studio which allows us to quickly manage changes, and during the course of construction we are able to continually update our As-Built drawings resulting in a digital format for our customers at project completion.

PRIMAVERA P6
A well-run construction project always begins with a carefully thought out construction plan. Our project team is accustomed to presenting their construction plan utilizing the critical path method (CPM) in a computer-generated format. We have the ability to present computer generated
schedules through Primavera Project Planner P6 software. These software packages are capable of clearly identifying the critical path, milestones, predecessors, successors, all forms of project float, lead and lag, and all activity relationships such as start-to-start, start-to-finish, and finish-to-finish.

The CPM schedule will show all design and approval activities, bidding and award activities, submittals processing and review, procurement and construction activities. Progress on activities will be tracked and reported regularly to SAED Investments IV, LLC. In cases where progress is lagging or delayed, the situation will be discussed with the Owner and design professionals, and an appropriate action plan will be determined and implemented.

The construction activity portion of the master schedule will be utilized to provide information on activity sequences and durations for the participating bidders. This schedule will be incorporated into the bid documents for subcontractor bidding.

**PROCORE**
S.C. Anderson started using Procore in 2017 and currently utilizes the construction software for approximately 30 ongoing projects. It allows sharing of documents like plans, specifications, drawings, etc. during the bid time and carries over into the construction phase. We currently utilize Procore for Requests for Information (RFI's), Change Orders, Contracts and project correspondence. Because it is 100% web-based, it allows project team members, Architects, and Owners to have immediate access to the project in real time, making sharing documents and collaborating on project ideas faster.

**FACILITY CONSTRUCTION, QUALITY CONTROL, ENVIRONMENTAL COMPLIANCE AND PROJECT SAFETY**

**SUBCONTRACTOR PRE-CONSTRUCTION MEETING**
Prior to the commencement of construction, S. C. Anderson, Inc. will conduct a mandatory pre-construction meeting involving all subcontractors and major suppliers who will be involved in the project. This meeting will review the project specific procedures and policies including the master CPM construction schedule, hours of work, job-site conduct, parking, communication protocol, daily reporting, labor compliance adherence, product submittal and coordination drawing processing, as-built drawing updates, request for information (RFI) processing and monthly billing requirements.

**SUBCONTRACT ASSIGNMENT AGREEMENT**
After the issuance of a Notice to Proceed by the CAPK, S.C. Anderson, Inc. will issue subcontract agreements to the successful subcontractors. Along with executing the agreement, each subcontractor will be required to provide payment and performance bonds (if requested), project specific insurance certificates and endorsements, a copy of their company I.I.P.P. safety policy, and a complete company contact list of all individuals involved in the project outlining their specific role. Subcontractor execution, as well as bond and insurance verification must be completed prior to allowing any trade contractor on the project premises.
PROJECT COMMUNICATION PROCEDURES
Our approach to the management of this project begins with open communication. We believe that our project team becomes an extension of the Owner’s staff. Therefore, we promote and implement proactive management as well as open communication between all members of the project team throughout the entire construction process.

Open links of communication and the timely exchange of accurate information are of paramount importance to the success of the project. To that end, we will utilize Procore as our integrated project management software package to assist in the administration and documentation of this project. Procore provides real-time information of the management of and access to all project-related data and communications, including budgets, actual costs, contracts, tracking logs, daily reports, meeting minutes, photos, RFI’s, etc. Procore also allows for simultaneous usage of the database by our office and field staff, as well as our clients and consultants through the internet. Procore provides a web-based cloud platform accessible by all project participants. Trade contractor participation in this collaborative environment will be mandatory.

Technology and specifically, electronic communications, has revolutionized our industry and is a tremendous tool to communicate effectively. Electric submission and review of shop drawing and submittal packages has also streamlined the procurements process from submittal package development to design team approval. All parties will receive the approved documents concurrently thus accelerating the procurement and coordination process. Permanent digital record storage also facilitates ease of access during the project and efficient record storage once the project is complete.

LEAN CONSTRUCTION METHODOLOGY
COLLABORATIVE PROJECT DELIVERY
AND LAST PLANNER SYSTEM
COORDINATION
A project of this nature involves multiple individuals ranging from S.C. Anderson, Inc.’s management staff, to the Owner’s representatives, design team, subcontractors, fabricators and suppliers. In addition to the Master CPM schedule S.C. Anderson, Inc. will work with each of the relevant subcontractors to develop and maintain a detailed 6 week Look-A-Head schedule outlining the daily activities planned for each portion of the construction process. This Look-A-Head schedule will be updated each week utilizing the Last Planner System techniques developed for Lean Construction. This collaborative system involves all individuals engaged in each phase of the project. The weekly sub-trade collaboration meetings are held each Tuesday at S.C. Anderson, Inc.’s on-site construction office. Members of the design team and Owner’s staff are encouraged to attend and participate. The resulting 6 week Look-A-Head schedule and Weekly Work Plans developed during each week’s planning session will be included in the information distributed at the Owner/Architect/General Contractor construction status meetings.

The collaborative 6 week schedule sessions each week are intended to take the activities outlined in the overall master schedule and break them down into daily tasks for each specific sub-trade and identify any obstacles or hurdles needing to be addressed that may impede progress. Each collaboration meeting agenda will include the following: The presence of construction safety hazards on site, product submittal and shop drawing approval status, offsite material fabrication
status, material delivery confirmations and
coordination, material staging and storage,
manpower planning, construction equipment
and scaffold systems, design clarifications,
updates and quality control and inspections.

MONTHLY PROGRESS BILLING REVIEWS
AND CASH FLOW PROJECTIONS
Progress payment monitoring and cash flow
management is a critical element to any
construction project. Proper analysis and
appropriate distribution of monthly billing
proceeds is a key element in S. C. Anderson,
Inc.'s risk management program. The
following process and procedures have
been developed by our staff to ensure the
monthly billing review, processing and
payment activities are accurate, fair and
timely.

Each month's billing cycle will begin with the
submission of draft billings to S.C. Anderson,
Inc. by all subtrades who actively worked on
the project during the billing cycle. The
subtrade draft billings will be due at our job-
site office by the 20th of each month. These
individual billings will first be reviewed by
S.C. Anderson, Inc.'s construction staff for
accuracy. The final proposed billing amounts
will be populated into the master schedule
of values for review with the Owner's
representative. The draft billing review will
take place on the 25th of each month. Once
the review is complete, the project's official
monthly invoice will be prepared in an AIA
G702/G703 format for submission to the
District. The final monthly billing will be
submitted no later than the 30th of each month.

PRODUCT SUBMITTAL / SAMPLES / SHOP
DRAWINGS
S.C. Anderson, Inc. will administer and
control the processing of subcontractor
submittals, samples and shop drawings.
After being reviewed for completeness,
submittal documents will be transmitted to
the relevant project participants for review,
color selection, and verification for
compliance with contract requirements.

After review, the submittal's disposition will
be noted on the submittal, which will be
signed, dated and returned to the trade
contractor. If required, the trade contractor
will revise the submittal, incorporating the
comments and will resubmit it for review and
verification for compliance. Submittals will be
logged, and copies will be retained in the
project files. No work will begin in the field
until the revised submittal has been
approved.

QUALITY ASSURANCE / QUALITY
CONTROL PROGRAM
S.C. Anderson, Inc. understands the
importance of a quality control & assurance
program (QA/QC) and has completed
previous projects utilizing our quality
assurance processes, strengths and focus.
Our QA/QC program starts with a strong
commitment from all partners (Owner,
Contractor, Architect, and Trade Contractor)
to complete QA for all projects. In addition,
we utilize our monthly team meetings as a
"lesson learned venue" to discuss and
increase our quality control procedures.

S.C. Anderson, Inc. feels strongly that
complex projects, like the Furniture City
project requires a careful and thorough
review of the contract documents and the
establishment of a specific QA/QC program.
This will be completed by our experienced
Project Manager in conjunction with the site
Superintendent.

INSPECTION AND TESTING ACTIVITIES
Inspection and testing services shall be
performed in accordance with Division 1 of
the specifications. Additional testing
requirements outlined in each specification
section shall also be adhered to. Ongoing
QA monitoring and oversight of QC
inspections and testing will be performed by
the S.C. Anderson, Inc. Superintendent.
As materials arrive at the site, the Superintendent will verify that all materials correspond to applicable submittals and/or specifications. Documentation showing class, type, grade and conformance to the submittal and/or specified material will be required prior to acceptance. Non-conforming materials shall be rejected by the Superintendent.

REQUIRED TESTS AND INSPECTIONS
Tests and inspections, as set forth in the specifications, California Building Code and Title 24 will be required. S.C. Anderson, Inc. shall perform pre-inspection and coordinate all applicable tests as prescribed in the technical specifications. Subcontractors shall be responsible for providing sample materials and testing specifically listed in their scope of work or required by the contract documents.

DAILY CONSTRUCTION REPORT
A daily construction report will be prepared each day. The report will include a summary of the trade contractor’s daily construction activities. Supporting inspection data sheets will be attached to the daily report where needed. At a minimum, the daily construction report will include the following information: description of weather conditions, including temperature, cloud cover, and precipitation, reports on any meetings held and their results, record of visitors to site, locations of construction underway during that day, equipment and personnel working in each activity, including trade contractors, descriptions of work being inspected, decisions made regarding approval of units of material or of work, and corrective actions to be taken, description of problems or delays and resolution, communications with subcontractor staff and construction activities completed and/or in progress.

INSPECTION AND TESTING REPORT FORMS
Report forms will be completed for inspections and tests conducted. The forms vary depending on inspection or test type. These forms include description or title of the inspection activity, location of the inspection activity or location from which the sample was obtained, recorded observation or test data, results of the inspection activity, personnel involved in the inspection activity, signature of the inspector, and final inspection/permit card with all required testing and inspection items inspected, approved and signed off by appropriate inspectors.

These records will be stored in files maintained in the project document control files. All original documents pertaining to project information will be maintained in the project file located at the project site office. The site staff will have primary responsibility for the centralized document control files for the project and construction documentation, pursuant to the contract specifications.

COMMISSIONING, FINAL INSPECTIONS, TRAINING, CONTRACT CLOSEOUT AND OCCUPANCY

COMMISSIONING
S. C. Anderson, Inc. will work with the Owner’s representative to provide “Commissioning” of mechanical, electrical or other systems as required by the project specifications. Our Commissioning Team along with the architect, the consultants and the Owner’s maintenance personnel, will oversee the subcontractor’s check-out of utilities, operational systems, and equipment for readiness and assist in their initial start-up and performance testing and required documentation.
TRAINING
Wherever the training for use or maintenance of any system is specified, we will coordinate training sessions of all mechanical, electrical and specialty items with the Architect and all necessary Owner personnel. Each training session will be documented as to the attendees, systems and equipment covered, topics discussed and duration of the training session. Video recording of systems training can also be performed at the Owner’s request for future reference.

FINAL INSPECTIONS
The S. C. Anderson, Inc./Radian Design Group team will work with the Engineers to conduct all final system verifications and inspections to obtain occupancy permits through the local building department and arrange for any other required outside Governmental Agency inspection and approval.

PUNCH LIST MANAGEMENT
When the subcontractor’s work, or a designated portion thereof, is substantially complete, S. C. Anderson, Inc. will review the completed work and prepare a preliminary punch list of incomplete or unsatisfactory items. This preliminary punch will outline any and all corrective actions needed by the trade contractors prior to requesting a final review by Radian Design and the Owner’s representatives.

RECORD DRAWINGS
All subcontractors are required to update progress as-built drawings on a monthly basis as a prerequisite for approval of their monthly progress-billing request. The as-built documents will be stored in our field office for easy reference and updating. Field changes and architect’s instructions that are issued during the construction period will be recorded on the as-built set continuously as work proceeds.

The subcontractors will be responsible for red-lining construction drawings in the field as preparation for as-built drawings. The as-built drawings will record approved actual field conditions upon completion of the work. The contract drawings will be marked up by the trade contractors as the project progresses to indicate as-built conditions. Where there was a change to a specified material, dimension, location, or other feature, the as-built drawing will indicate the work performed. Upon the completion of the as-built red-line drawings, the trade contractor will submit the red-line mark-up drawings to S.C. Anderson, Inc. and Radian Design for review. The field office as-built set will be turned over to the Owner in digital format for future reference at the end of the construction.

CLOSEOUT DOCUMENTS
Upon completion of the project and prior to occupancy, S. C. Anderson, Inc. will secure and transmit to the District all required warranties, guarantees, operation and maintenance manuals, certificates, affidavits, releases, bonds, waivers, keys, manuals, record drawings, and maintenance stock.

FINAL ACCOUNTING
At the conclusion of the project, S. C. Anderson, Inc. will provide a final accounting of the project costs pursuant to the terms of the agreement. Additionally, final project reports will be prepared and turned over to the CAPK to document all transactions that occurred during the progress of the project.
### CAPK Tenant Improvements

**Preconstruction and Construction Schedule**

**S. C. Anderson, Inc.**

June 6, 2023

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<th>YEAR</th>
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#### 1 Preconstruction

1A Project Award

1B Design Drawings - Construction Documents

1C Owner Review

#### 2 Permitting/Bidding/Contracting

2A Plan Check Submittal

2B Back Check Submittal

2C Final Approval - Issue Permit

2D Bidding Period

2E Finalize Price & Contract

#### 3 Construction

3A Construction
Design consultants identified at this time and part of the S.C. Anderson Inc./Radian Design Group team will be:

![ACCO Engineered Systems](image)

Engineering is the foundation of outstanding mechanical systems. The challenge is to transform innovative ideas into practical and reliable systems.

ACCO leads with the right concepts to meet your needs and brings the advantage of system fabrication and installation know-how to capitalize on the best means and methods for cost effective results.

We focus beyond the initial installation to ensure that your system is designed to last and function reliably for many years under varying conditions and requirements. Our engineers utilize the experience of our commissioning and service professionals to design systems that will be serviceable and perform efficiently for the long term.

Creative solutions, cost effective designs and reliable performance is our engineers’ commitment to you.

Whether your needs are large or small, simple or complex, our engineering staff will work with your design team and contractors to guarantee you are provided with the best design to meet your requirements and that it is complete, coordinated and code compliant. Below is a brief list of the services we provide:

- 3-D Modeling and Design Coordination
- Preconstruction Services and Planning

We look forward to each new assignment and the opportunity to share the experience and knowledge we have gained over more than 70 years in the industry.

**JOHN A. MARTIN ASSOCIATES**

**JOHN A. MARTIN ASSOCIATES & STRUCTURAL ENGINEERS**

**John A. Martin & Associates, Inc. (JAMA)** is an internationally recognized structural engineering firm founded in 1953 and headquartered in Los Angeles, California. With affiliate offices in the western United States, JAMA is one of the largest privately-owned structural engineering companies in the nation.

JAMA is recognized by owners, architects and peers as a partner and collaborator in the design and construction process; delivering exceptional client service and design solutions that balance technical precision, cost appropriateness and architectural intent.

The firm is committed to advancing structural awareness and applications among its clients and employees and applies advanced structural research via an in-house research and development entity to projects of all types, size and complexity.
Let Our Team Help You from the Ground Up
Does your commercial building need an entire plumbing system designed and built from the ground up? Our company is staffed with talented engineers who have the experience you need to get your project moving along quickly. At HPS Plumbing, our design & build plumbing company is dedicated to serving our customers with excellent customer service and efficient workers who use the top tools and products on every job. If you’re in the process of designing a commercial building, our engineers can help design a custom plumbing system that works with your budget and meets industry standards and codes.

At HPS Plumbing Company, our team of Bakersfield design & build plumbers and engineers have achieved the following:

- We’ve completed more than 100 design & build projects
- We’ve executed 3D modeling and BIM designs
- We’ve worked on projects for Adelanto RTC prison, Moreland Corporation, and Van Waters and Rogers New Solvent Tank Farm in San Jose for Hensel Phelps

Since 1982, John Maloney has been committed to creating the most cost-effective, energy-efficient electrical and lighting design solutions for government, commercial, and residential projects. In 1994, Maloney formed JMPE, his own electrical engineering and lighting design business headquartered in Santa Barbara, California. Maloney’s areas of expertise include electrical design of power, lighting, and signal systems; distribution system design, short circuit analysis, coordination studies and Title 24 Lighting Calculations; as well as interior and exterior lighting design for retail stores, offices, and residences.

A native of Connecticut, Maloney graduated with a Bachelor of Science in Electrical Engineering (BSEE) from Lehigh University in Bethlehem, Pennsylvania in 1982. He was awarded his Master of Science in Systems Management (MSSM) from University of Southern California (USC) two years later. Maloney served four years with the United States Air Force 4392 Civil Engineering Squadron, Vandenberg Air Force Base, California where he designed electrical systems in support of the Space Shuttle and Peacekeeper operations. From 1987-94, Maloney was a principal of the Santa Barbara Electrical Design Group.
CONFLICT OF INTEREST

S.C. Anderson, Inc. and Radian Design Group Inc. has no interest and shall not acquire any interest which would present a conflict of interest with CAPK pursuant to California Government Code sections 1090 et seq. and 87100 et seq. S.C. Anderson, Inc. further certifies that, to the best of its knowledge after due inquiry, no employees or agents of CAPK are now, nor in the future will they be, in any manner interested directly or indirectly in the Design Build Agreement, or in any profits expected to arise from the Design Build agreement, as set forth in California Government Code sections 1090 et seq and 87100 et seq.
# APPENDIX A

Community Action Partnership of Kern  
* Procurement Department  
5005 Business Park North, Bakersfield, CA 93309 • 661.336.5236 • FX: 661.322.2237

## VENDOR INFORMATION SHEET

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<thead>
<tr>
<th>Date:</th>
<th>June 6, 2023</th>
<th>Prepared By:</th>
<th>Leigh Ann Anderson</th>
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### Official Business Name:  
S.C. Anderson, Inc.

### DBA:  
n/a

### Location Address:  
11109 River Run Blvd Suite 200 Bakersfield CA 93311

### Remit Address:  
11109 River Run Blvd Suite 200 Bakersfield CA 93311

### Contact Person:  
Leigh Ann Anderson

### Phone #:  
661-392-7000

### Fax #:  
661-391-9999

### CAP# Vendor #:  

### Federal ID # or SS#:  
94-2903107

### Contractor Lic #:  
441769

### General Liability Insurance Carrier & Policy #:  
Starr Indemnity & Liability Company 1000026026231

### Auto Liability Insurance Carrier & Policy #:  
Starr Indemnity & Liability Company 1000672997231

### Workers Compensation Insurance Carrier & Policy #:  
Starr Indemnity & Liability Company 1000005302

### FEDERAL TAX CLASSIFICATION:  

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### BUSINESS ENTITY/CLASSIFICATION:  

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<tr>
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<td>For Profit</td>
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<td>Housing Collaborative</td>
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<td>Provider</td>
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### SBA CLASSIFICATION:  

- Minority-Owned
- Small Business
- Veteran-Owned
- Woman-Owned

- 40 Years in Business
- Accept Purchase Orders: Yes

If your business has a Social Security number as Tax ID, we require the signature of the owner.

### Authorized Signature:  

<table>
<thead>
<tr>
<th>Title:</th>
<th>Chief Executive Officer</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Print Name:</th>
<th>Leigh Ann Anderson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
<td>June 6, 2023</td>
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**REV. 012516**
W-9

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

Name as shown on your income tax return. Name is required on this line; do not leave this line blank.

S C Anderson Inc

Business name disregarded entity name, if different from above.

Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

- Individual/sole proprietor or single-member LLC
- C Corporation
- S Corporation
- Partnership
- Trust/estate
- Limited liability company. Enter the tax classification (C, S, or LLC) in boxes 3 through 6.

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Address (number, street, and apt. or suite no.) See instructions.

1109 River Run Blvd, Suite 200
PO Box 20489
Bakersfield, CA 93311
Bakersfield, CA 93390

City, state, and ZIP code

List account number(s) here (optional).

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see What Name and Number To Give the Requester for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person

Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1098-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.
APPENDIX C

Community Action Partnership of Kern
Additional Terms and Conditions

1. TAXES. The Contractor is solely responsible to pay all taxes and comply with all Federal, State, and local laws, ordinances, rules, regulations and lawful orders bearing on the performance of work.

2. ASSIGNMENT OR SUBCONTRACTING. The Contractor may not assign or transfer the Agreement, or any interest therein or claim thereunder, or subcontract any portion of the work thereunder, without the prior written approval of CAPK. If CAPK consents to such assignment or transfer, the terms and conditions of the Agreement shall be binding upon any assignee or transferee. Any transfer shall be considered an addendum to the Agreement and must be included as such.

3. TERMINATION FOR CONVENIENCE OF CAPK. CAPK may terminate the Agreement at any time by giving written notice to the Contractor of such termination and specifying the effective date thereof. In that event, all finished or unfinished documents and other materials as described herein, at the option of CAPK, shall become its property. If the Agreement is terminated by CAPK as provided herein, the Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents and other materials. The Contractor hereby expressly waives any and all claims for damages or compensation arising under the Agreement except as set forth in this section in the event of such termination.

4. CHANGES. CAPK may from time to time, require changes in the scope of the services of the Contractor to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor’s compensation which are mutually agreed upon by and between CAPK and the Vendor, shall be effective when incorporated in written amendments to the Agreement. Amendments shall be valid only after approval by Contractor and CAPK’s Chief Executive Officer.

5. CLAIMS. All claims for money due or to become due to the Contractor from CAPK under the Agreement may not be assigned to a bank, trust company, or other financial institution without CAPK approval. Notice or requests of any such assignment or transfer shall be furnished promptly in writing to CAPK.

6. NOTICE. Any notice or notices required or permitted to be given pursuant to the Agreement may be personally served on the other party by the party giving such notice, or may be served by certified mail, return receipt requested.

7. AFFIRMATIVE ACTION. The Contractor agrees to abide by all State and Federal Affirmative Action policies and laws.

8. DISPUTE RESOLUTION. Any dispute arising regarding the interpretation or implementation of the Agreement, including any claims for breach of the Agreement, shall be resolved by submitting the claim for arbitration to the American Arbitration Association in accordance with its rules and procedures applicable to commercial disputes. The location of any arbitration hearing shall be Bakersfield, California, and any enforcement of the arbitrator’s decision shall be brought in the Superior Court of the County of Kern, Bakersfield, California.

9. EQUAL EMPLOYMENT OPPORTUNITY. All hiring and other employment practices by the Contractor shall be non-discriminatory, based on merit and qualifications without regard to race, color, religion, national origin, ancestry, disability, medical condition, marital status, age or sex.

10. SBE/MBE/WBE POLICY STATEMENT. It is the policy of Community Action
Partnership of Kern, consistent with Federal, State and local laws, to promote and encourage the development, participation, and continued expansion of Small Business Enterprises, Minority Business Enterprises and Women’s Business Enterprises.

11. **AMERICAN MADE.** To the extent practicable, all equipment and products provided by Contractor will be American made.

12. **CONFIDENTIALITY.** The Contractor shall use his or her best efforts to keep confidential any information obtained during the performance of the Agreement.

13. **RESPONSIBILITY.** If Contractor is part of a corporation, the individual or individuals who sign the Agreement on behalf of the corporation are jointly responsible for performance of the Agreement.

14. **PROTEST BY VENDOR:** If the Contractor wishes to file a protest against CAPK for any action, the Contractor must do so in writing with CAPK within 72 hours after the action to be protested has occurred. All protests will be taken under advisement. Any protests received after that will not be recognized.

15. **CONFLICT OF INTEREST:** In accordance with California Public Contract Code 10410, no officer or employee of CAPK shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest in the Agreement, which may be in whole, or in part, sponsored or funded by a Local, State, or Federal agency. Also, no relative of an employee of CAPK may enter into or bid on an Agreement while said employee is still employed by CAPK. No relative of an employee of CAPK may bid on an Agreement until 12 months after the date said employee of CAPK has left employment of CAPK, either voluntarily or involuntarily. It is contrary to CAPK policy for any CAPK employee to personally solicit, demand or receive any gratuity of any kind from a Contractor in connection with any decision affecting a CAPK purchase or Agreement for Goods or Services. Thus, if such a case were to occur, the Contractor may file a protest with CAPK as specified in the section titled “Protest by Contractor.”

16. **DEBARMENT AND SUSPENSION CERTIFICATION:** Contractor, under penalty of perjury, certified that, except as noted below, he/she or any person associated therewith in the capacity of owner, partner, director, officer, manager:
   
   a. Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;
   
   b. Has not been suspended, debarred, voluntarily excluded or determined ineligible by any federal agency within the past three (3) years;
   
   c. Does not have a proposed debarment pending; and
   
   d. Has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.

If there are any exceptions to the Certifications above, insert the exceptions in the following space: Exceptions will not necessarily result in denial of award but will be considered in determining Vendor responsibility. For any exception noted above, indicate below to whom it applies, initiating agency, and dates of action. Note: Providing false information may result in criminal prosecution or administrative sanctions.

17. **WORKER’S COMPENSATION:** Labor Code Section 3700 provides:

   “Every employer except the State and all political subdivisions or institutions thereof, shall secure the payment of compensation in one or more of the following ways:

   "(a) By being insured against liability to pay compensation in one or to more than one of the insurers duly authorized to write compensation insurance in this State."
"(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees."

Contractor is aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions of that Code, and Vendor will comply with those provisions before commencing the performance of the work of the Agreement.

(In accordance with Article 5 [commencing at Section 1660], Chapter 1, Part 7, Division 2 of the Labor Code, this certificate must be signed and filed with the awarding body prior to performing any work under the Agreement.)

18. INSURANCE REQUIREMENTS: Contractor shall procure, furnish and maintain for the duration of the Agreement the following types and limits of insurance herein:

a. Automobile Liability Insurance, providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:

b. Provide coverage for owned, non-owned and hired autos.

c. Contain an additional insured endorsement in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

d. Broad Form Commercial General Liability Insurance, ISO form CG00 01 11 85 or 88 providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:

e. Provide Contractual Liability coverage for the terms of the Agreement.

f. Contain an additional insured endorsement in favor in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

g. Workers' compensation insurance with statutory limits and employer's liability insurance with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall contain a waiver of subrogation endorsement in favor of Community Action Partnership of Kern, its board, officers, agents, employees and volunteers.

All policies required of the Contractor shall be primary insurance as to Community Action Partnership of Kern, its board, officers, agents employees and volunteers and any insurance or self-insurance maintained by Community Action Partnership of Kern, its board, officers, agents employees and designated volunteers shall be in excess of the Contractor's insurance and shall not contribute with it. Additional insured endorsement shall use ISO form CG20 10 11 85 (in no event with an edition date later than 1990).

Insurance is to be placed with insurers with a Best's rating of no less than A: VII. Any deductibles, self-insured retentions or insurance in lesser amounts, or lack of certain types of insurance otherwise required by the Agreement, or insurance rated below Best's A: VII, must be declared prior to execution of the Agreement and approved by CAPK in writing.

All policies shall contain an endorsement providing Community Action Partnership of Kern with thirty (30) days written notice of cancellation or material change in policy language or terms. All policies shall provide that there shall be continuing liability thereon, notwithstanding any recovery on any policy.

The insurance required hereunder shall be maintained until all work required to be
performed by the Agreement is satisfactorily completed. Contractor shall furnish CAPK with a certificate of insurance and required endorsements evidencing the insurance required. CAPK may withdraw its offer of an Agreement or cancel the Agreement if certificates of insurance and endorsements required have not been provided prior to the execution of the Agreement.

[Signature] June 6, 2023

Leigh Ann Anderson

PRINT NAME

S.C. Anderson, Inc.

COMPANY NAME
ATTACHMENT B
BID SHEET

Offerors will be required to submit with their Proposals with the following fee components:

a. Design Fee $357,000.00
b. Improvement Cost $2,993,000.00
c. Estimated Permit Fees $60,000.00

The Construction Fee shall be based on plans and specifications and all clarifications provided during the RFP process. If after the award and during design any conflicts with the building code that materially alter the design shall be addressed via change order.

ALTERNATE BID
Replace all existing light fixtures with LED including lighting controls and install new acoustical ceiling grid and tile throughout.  ADD $830,000.00

QUALIFICATIONS
1. The fees listed above are submitted for budgeting purposes due to the limited information related to the design requirements and absence of contractual terms and conditions.
2. Final price will be negotiated upon completion of the design and approvals from all governing agencies.
3. No service or repair to existing equipment is included in this proposal.
4. All work performed during normal business hours.

EXCLUSIONS
1. Testing and inspection fees
2. Utility connection fees
3. Hazardous material handling
4. Performance and payment bonds
5. Subcontractor bonds
6. Low voltage systems & wiring
7. Course of Construction Insurance
8. Off Site improvements
9. Furniture, fixtures and equipment
10. Computer, phone and data cabling
11. Security System
12. Prevailing wages
13. Repair or service to existing equipment
| 1. Prior experience with a public or community agency on similar projects | Points = 15 |
| 2. Three (3) references for similar projects | Points = 15 |
| 3. Contractor's organization, size, structure and capacity | Points = 15 |
| 4. Staff qualifications and relevant experience | Points = 15 |
| 5. Project Schedule | Points = 10 |
| 6. Design Fee | Points = 10 |
| 7. Improvement Cost | Points = 20 |
| **Total** | **Points = 100** |

5. RFP is amended to add Attachment B, Bid Sheet. See attached. Bid sheet shall be completed and returned with proposal.

6. The HVAC system at the building is complex and coordination, review, and system modification shall be completed by the system manager. The maintenance of all systems is completed by ACCO the onsite contact is Eric Zielendorf, contact ezielsdorf@accoes.com or 755-3275.

Acknowledgment/Receipt of Clarification

[Signature]

June 6, 2023

Date

*SIGNED ACKNOWLEDGEMENT OF RFI MUST BE SUBMITTED WITH PROPOSAL*
If it is more cost-effective to build new walls rather than reuse the existing partition system it is up to the contractor’s discretion. Any partitions not used must be safely stored in coordination with CAPK.

18. Sheet 102- general notes- server rooms- are drawings correct? Room 220 and Room 320? Should this be room 319 instead of room 320?
   
   Correct The server rooms are identified as rooms 220 and 319. General note 7 on sheet 104 should notate room 319.

19. For the line set from roof for mini split, where is the roof access?

   Please refer to sheet A-2.5 of the original plan set for roof plan of the building. Roof can be accessed from west stairwell. Plans can be downloaded from: Procurement Opportunities - CAPK or https://www.capk.org/business/
   
   a. Is there a specified mounting location?

   Mounting location in the room can be either on south, east, or west walls, whatever is more practical. The roof location will need to be coordinated with ACCO.

   b. Is there an existing chase to install the line in from top to bottom?

   Please review the original plans using the link. According to the plans there does not appear to be a phone room at the fourth floor. The electrical room however is directly above each electrical room for all four floors.

20. Are we to assume that General Notes number 8 and 9 on sheet 104 also apply to sheet 102?

   Correct this note was unintentionally omitted from sheet 102. Please apply notes to both sheets.

   a. Relocate/add light fixtures as necessary to ensure uniformity and adequate lighting due to removed and added walls.

   b. Relocate/add supply and return air ducts as necessary to ensure an efficient HVAC system for all spaces, due to removed and added walls.

21. Has a subsequent job walk been scheduled?

   Please see the clarification.

Acknowledgment/Receipt of RFI Response

[Signature] June 6, 2023

Signature Date

SIGNED ACKNOWLEDGEMENT OF RFI MUST BE SUBMITTED WITH PROPOSAL

Community Action Partnership of Kern
RFP OPs 2023-001
REQUEST FOR PROPOSALS

DESIGN BUILD – TENANT IMPROVEMENTS

June 6, 2023
MEMORANDUM

To: Board of Directors

From: Vanessa C. Mendoza, Grant Administrator

Date: June 28, 2023

Subject: Agenda Item V(d): Calendar Year 2024-25 Community Action Plan and Community Needs Assessment – Action Item

Every two years, Community Action Partnership of Kern (CAPK) completes a Community Needs Assessment (CNA) and Community Action Plan (CAP).

Public Law 105-285 (the CSBG Act) and the California Government Code require that California Department of Community Services and Development secure a CAP, including a CNA from each agency. The CSBG Act directs that receipt of a CAP is a condition to receive funding. To meet this requirement, the Community Development division has completed an assessment of poverty-related needs, available resources, feasible goals and strategies that yield program priorities consistent with standards of effectiveness established for our 19 programs.

Although CSD may prescribe statewide priorities or strategies that require consideration at the local level, CAPK is authorized to set its own program priorities in conformance to its determination of local needs. The following CAP supported by the CNA is CAPK’s two-year plan that shows how agencies will deliver CSBG services.

Recommendation:

Staff recommends the Board of Directors approve the submission of the Calendar Year 2024-25 Community Action Plan and Community Needs Assessment to the California Department of Community Services and Development.

Attachments:
Calendar Year 2024-25 Community Action Plan and Community Needs Assessment
Calendar Year 2024-25 Community Action Plan and Community Needs Assessment PowerPoint Presentation
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Introduction

The Department of Community Services and Development (CSD) has developed the 2024/2025 Community Needs Assessment (CNA) and Community Action Plan (CAP) template for the Community Services Block Grant (CSBG) Service Providers network. Each agency must submit a completed CAP, including a CNA to CSD on or before June 30, 2023. Changes from the previous template are detailed below in the “What's New for 2024/2025?” section. Provide all narrative responses in 12-point Arial font with 1.15 spacing. When the CNA and CAP are complete, they should not exceed 65 pages, excluding the appendices.

Purpose

Public Law 105-285 (the CSBG Act) and the California Government Code require that CSD secure a CAP, including a CNA from each agency. Section 676(b)(11) of the CSBG Act directs that receipt of a CAP is a condition to receive funding. Section 12747(a) of the California Government Code requires the CAP to assess poverty-related needs, available resources, feasible goals, and strategies that yield program priorities consistent with standards of effectiveness established for the program. Although CSD may prescribe statewide priorities or strategies that shall be considered and addressed at the local level, each agency is authorized to set its own program priorities in conformance to its determination of local needs. The CAP supported by the CNA is a two-year plan that shows how agencies will deliver CSBG services. CSBG funds are by their nature designed to be flexible. They shall be used to support activities that increase the capacity of low-income families and individuals to become self-sufficient.

Federal CSBG Programmatic Assurances and Certification

The Federal CSBG Programmatic Assurances are found in section 676(b) of the CSBG Act. These assurances are an integral part of the information included in the CSBG State Plan. A list of the assurances that are applicable to CSBG agencies has been provided in the Federal Programmatic Assurances section of this template. CSBG agencies should review these assurances and certify that they are complying.

State Assurances and Certification

As required by the CSBG Act, states are required to submit a State Plan as a condition to receive funding. Information provided in agencies’ CAPs will be included in the CSBG State Plan. Alongside Organizational Standards, the state will be reporting on State Accountability Measures in order to ensure accountability and program performance improvement. A list of the applicable State Assurances and the agency certification for them are found in the State Assurances section of this template.
Compliance with CSBG Organizational Standards

As described in the Office of Community Services (OCS) Information Memorandum (IM) #138 dated January 26, 2015, CSBG agencies will comply with implementation of the Organizational Standards. CSD has identified the Organizational Standards that are met through the completion of the CAP and the CNA. A list of Organizational Standards that will be met upon completion of the CAP can be found in the Organizational Standards section of this template. Agencies are encouraged to utilize this list as a resource when reporting on the Organizational Standards annually.

What’s New for 2024/2025?

**Community Action Plan Workgroup (CAPWG).** In summer 2022, CSD organized a workgroup to inform the development of the 2024/2025 CNA and CAP. Workgroup members were selected from the CSBG Service Provider network and the ROMA Coalition. The feedback CSD received from the workgroup has informed not only the 2024/2025 template but also the accompanying CAP training scheduled for mid-December 2022.

**Public Hearings – Additional Guidance.** The public hearing requirement has been modified. Two years ago, we were in an active pandemic due to the COVID-19 virus. The public health guidelines throughout the state advised communities against large gatherings. CSD advised agencies to follow public health protocols and hold public meeting virtually if an in-person meeting was not an option. For the public hearing on the 2024/2025 draft CAP, CSD requests that agencies conduct in-person, virtual, or hybrid public hearings. While transmission rates of COVID-19 remain high in many communities, agencies are requested to follow their local public health guidelines when deciding in which format to conduct the public hearing. For more information, please see the Public Hearing section of this template.

**CNA Helpful Resources.** The Helpful Resources section in Part I: Community Needs Assessment contains additional data sets and resources. On recommendation of the CAPWG, CSD has added data sets from the Massachusetts Institute of Technology, the University of Wisconsin, and a point-in-time data set from the U.S. Department of Housing and Urban Development. We have also added links to the Local Agencies Portal where you can find examples of completed Community Needs Assessments and project timelines from the CSBG Service Providers network.

**Part II: Community Action Plan.** The number of questions in the Tripartite Board of Directors, Service Delivery System, Linkages and Funding Coordination, and Monitoring sections has changed. Questions were removed because it was determined that agencies meet these reporting requirements through other CSBG work products such as monitoring and Organizational Standards. In the Service Delivery System and Linkages and Funding Coordination sections, new questions were added. These questions will be covered during the template training webinar.

**Sunset of COVID-19 Flexibilities.** In the 2022/2023 template, CSD allowed agencies to indicate on selected questions whether there were changes to the response provided in the 2020-2021 CAP or whether agencies would like CSD to accept the 2020-2021 response without adoptions. This option was an effort to reduce administrative burden on agencies during the COVID-19 pandemic. While
CSD has retained some of the flexibilities developed in the previous template, the option for agencies to reference responses in their prior CAP has been discontinued.

**Response and Community Awareness.** This section replaces the “Additional Information” section in the previous template. For 2024/2025 CSD has included questions pertaining to Diversity, Equity, and Inclusion (DEI). The questions about disaster preparedness have been retained from the previous template. While none of this information is directly mandated by statue, CSD is requesting the information to gauge where the CSBG Service Provider network is as a whole on these topics. Responses to the questions in this section are mandatory.

**ROMA Certification Requirement.** Under section 676(b)(12) of the CSBG Act, CSD and all CSBG agencies are required to assure that we will participate in a Results Oriented Management and Accountability System “not later than fiscal year 2001.” CSD and the CSBG Service Providers have fulfilled this requirement through various approaches. With respect to the ROMA certification of the network CAPs (Organizational Standard 4.3), CSD has allowed agencies to submit their CAP without the signature of a ROMA trainer or implementer if the agency did not have a ROMA trainer or implementer on staff. CSD staff who had the requisite training would certify those CAPs on behalf of the agencies. This process will still be in place for the 2024/2025 template. However, for the 2026/2027 template, CSD will require that CSBG Service Providers provide their own ROMA certification either by staff who have the required ROMA training or in partnership with another agency or organization. CSBG Service Providers should begin formulating a plan to fulfill this requirement.
Checklist

☑ Cover Page and Certification
☑ Public Hearing(s)

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☑ State Assurances and Certification
☑ Organizational Standards
☑ Appendices
COMMUNITY SERVICES BLOCK GRANT (CSBG)
2024/2025 Community Needs Assessment and Community Action Plan
Cover Page and Certification

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Community Action Partnership of Kern</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of CAP Contact</td>
<td>Vanessa C. Mendoza</td>
</tr>
<tr>
<td>Title</td>
<td>Grant Administrator</td>
</tr>
<tr>
<td>Phone</td>
<td>661-336-5236 Extension</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:vmendoza@capk.org">vmendoza@capk.org</a></td>
</tr>
</tbody>
</table>

CNA Completed MM/DD/YYYY: [ ]
(Organizational Standard 3.1)

Board and Agency Certification
The undersigned hereby certifies that this agency complies with the Federal CSBG Programmatic, and State Assurances as outlined in the CSBG Act and California Government Code, respectively for services provided under the Federal Fiscal Year 2024/2025 Community Action Plan. The undersigned further certifies the information in this Community Needs Assessment and the Community Action Plan is correct and has been authorized by the governing body of this organization. (Organizational Standard 3.5)

<table>
<thead>
<tr>
<th>Board Chair (printed name)</th>
<th>Board Chair (signature)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fred Plane</td>
<td></td>
<td>6/29/23</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Executive Director (printed name)</th>
<th>Executive Director (signature)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeremy T. Tobias</td>
<td></td>
<td>6/29/23</td>
</tr>
</tbody>
</table>

Certification of ROMA Trainer/Implementer (If applicable)
The undersigned hereby certifies that this agency’s Community Action Plan and strategic plan documents the continuous use of the Results Oriented Management and Accountability (ROMA) system (assessment, planning, implementation, achievement of results, and evaluation).

<table>
<thead>
<tr>
<th>NCRT/NCRI (printed name)</th>
<th>NCRT/NCRI (signature)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanessa C. Mendoza</td>
<td></td>
<td>6/29/23</td>
</tr>
</tbody>
</table>

CSD Use Only

<table>
<thead>
<tr>
<th>Dates CAP (Parts I &amp; II)</th>
<th>Accepted By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received</td>
<td>Accepted</td>
</tr>
</tbody>
</table>
Public Hearing(s)
California Government Code Section 12747(b)-(d)

State Statute Requirements

As required by California Government Code Section 12747(b)-(d), agencies are required to conduct a public hearing for the purpose of reviewing the draft CAP. All testimony presented by low-income individuals and families during the public hearing shall be identified in the final CAP. Agencies shall indicate whether or not the concerns expressed by low-income individuals and families have been addressed. If an agency determines that any of the concerns have not been addressed in the CAP, the agency shall include in its response document, information about the concerns and comment as to their validity.

Guidelines

Notice of Public Hearing

1. Notice of the public hearing and comment period must be published at least 15 calendar days prior to the public hearing.
2. The notice may be published on the agency’s website, social media channels, and/or in newspaper(s) of local distribution.
3. The notice must include information about the draft CAP; where members of the community may review, or how they may receive a copy of, the draft CAP; the dates of the comment period; where written comments may be sent; date, time, and location of the public hearing; and the agency contact information.
4. The comment period should be open for at least 15 calendar days prior to the public hearing. Agencies may opt to extend the comment period for a selected number of days after the hearing.
5. The draft CAP must be made available for public review and inspection at least 30 days prior to the public hearing. The draft CAP can be posted on the agency’s website, social media channels, and distributed electronically or in paper format.
6. Attach a copy of the Notice(s) of Public Hearing as Appendix A to the final CAP.

Public Hearing

1. Agencies must conduct at least one public hearing on the draft CAP.
2. Public hearing(s) will be held in the designated CSBG service area(s).
3. Low-income testimony presented at the hearing or received during the comment period must be memorialized verbatim in the Low-Income Testimony and Agency’s Response document and appended to the final CAP as Appendix B.
4. The Low-Income Testimony and Agency’s Response document should include the name of low-income individual, his/her verbatim testimony, an indication of whether or not the need was addressed in the draft CAP, and the agency’s response to the testimony if the concern was not addressed in the draft CAP.
**Additional Guidance**

COVID-19 poses unique challenges to fulfilling the public hearing requirement. CSD asks that agencies continue to adhere to state and local public health guidance to slow the spread of the virus and ensure public safety. The health and safety of agency staff and the communities you serve is paramount. Therefore, for the purposes of fulfilling the public hearing requirement on the draft CAP, agencies may conduct the public hearing in-person, remotely, or using a hybrid model (in-person and remotely) based on the public health protocols in place in their communities.

**Public Hearing Report**

<table>
<thead>
<tr>
<th>Date(s) of Public Hearing(s)</th>
<th>June 8, 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location(s) of Public Hearing(s)</td>
<td>Friendship House Community Center 2424 Martin Luther King, Jr. Blvd, Bakersfield, CA 93309</td>
</tr>
<tr>
<td>Dates of the Comment Period(s)</td>
<td>Tentative – May 24, 2023 – June 8, 2023</td>
</tr>
<tr>
<td>Where was the Notice of Public Hearing published? (agency website, newspaper, social media channels)</td>
<td>Social media-Facebook, LinkedIn, Twitter and constant contact email blast.</td>
</tr>
<tr>
<td>Date the Notice(s) of Public Hearing(s) was published</td>
<td>May 24, 2023</td>
</tr>
<tr>
<td>Number of Attendees at the Public Hearing(s) (Approximately)</td>
<td>11</td>
</tr>
</tbody>
</table>
**Part I: Community Needs Assessment**

CSBG Act Section 676(b)(11)
California Government Code Section 12747(a)

**Helpful Resources**

In 2011, NASCSP published a [Community Action to Comprehensive Community Needs Assessment Tool](#) that supports planning and implementing a comprehensive CNA. The tool lays out design choices, planning steps, implementation practices, analysis, and presentation options.

The National Community Action Partnership has an [Assessment Tool](#) designed specifically for the community needs assessment process. Here you can select from a variety of county-specific data sets.

Examples of Community Needs Assessments and project timelines from agencies within the California CSBG Providers network can be found on the [Local Agencies Portal](#) under the CSBG – Resources tab. If you do not have an account or have not received CSD login credentials, please email CSD at [ExternalAccess@csd.ca.gov](mailto:ExternalAccess@csd.ca.gov).

To provide a comprehensive “picture” of the community needs in your service area(s), agencies will collect and analyze both quantitative and qualitative data. Links to several national and state quantitative data sets are given below. Local and agency data also provide information about the needs of the community.

<table>
<thead>
<tr>
<th>Sample Data Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>U.S. Census Bureau</strong></td>
</tr>
<tr>
<td>Poverty Data</td>
</tr>
<tr>
<td><strong>U.S. Bureau of Labor Statistics</strong></td>
</tr>
<tr>
<td>Economic Data</td>
</tr>
<tr>
<td><strong>U.S. Department of Housing and Urban Development</strong></td>
</tr>
<tr>
<td>Housing Data &amp; Report</td>
</tr>
<tr>
<td><strong>HUD Exchange</strong></td>
</tr>
<tr>
<td>PIT and HIC Data Since 2007</td>
</tr>
<tr>
<td><strong>National Low-Income Housing Coalition</strong></td>
</tr>
<tr>
<td>Housing Needs by State</td>
</tr>
<tr>
<td><strong>National Center for Education Statistics</strong></td>
</tr>
<tr>
<td>IPEDS</td>
</tr>
<tr>
<td><strong>Massachusetts Institute of Technology</strong></td>
</tr>
<tr>
<td>Living Wage Calculator</td>
</tr>
<tr>
<td><strong>University of Wisconsin</strong></td>
</tr>
<tr>
<td>Robert Wood Johnson Foundation</td>
</tr>
<tr>
<td>County Health Rankings</td>
</tr>
<tr>
<td><strong>California Department of Education</strong></td>
</tr>
<tr>
<td>School Data via DataQuest</td>
</tr>
<tr>
<td><strong>California Employment Development Department</strong></td>
</tr>
<tr>
<td>UI Data by County</td>
</tr>
<tr>
<td><strong>California Department of Public Health</strong></td>
</tr>
<tr>
<td>Various Data Sets</td>
</tr>
<tr>
<td><strong>California Department of Finance</strong></td>
</tr>
<tr>
<td>Demographics</td>
</tr>
<tr>
<td><strong>California Attorney General</strong></td>
</tr>
<tr>
<td>Open Justice</td>
</tr>
<tr>
<td><strong>California Governor's Office</strong></td>
</tr>
<tr>
<td>Covid-19 Data</td>
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<tr>
<td><strong>California Health and Human Services</strong></td>
</tr>
<tr>
<td>Data Portal</td>
</tr>
<tr>
<td><strong>CSD</strong></td>
</tr>
<tr>
<td>Census Tableau</td>
</tr>
<tr>
<td>Data by County</td>
</tr>
<tr>
<td><strong>Population Reference Bureau</strong></td>
</tr>
<tr>
<td>KidsData</td>
</tr>
</tbody>
</table>
# Community Needs Assessment Narrative

CSBG Act Sections 676(b)(3)(C), 676(b)(9)
Organizational Standards 1.1, 1.2, 1.3, 2.2, 3.2, 3.3, 3.4

## 1. Describe how your agency collected and included current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for your service area. (Organizational Standard 3.2)

Our agency collected current data on poverty and its prevalence related to gender, age, and race/ethnicity by utilizing the national and state data sets presented in this template.

## 2. Describe the geographic location(s) that your agency is funded to serve with CSBG. If applicable, include a description of the various pockets, high-need areas, or neighborhoods of poverty that are being served by your agency.

CAPK serves all of Kern County, California—8,163 square miles of valleys, mountains, and deserts. CAPK’s 19 direct service programs provide an array of services, tailored to the needs of each community. For example, Kern is one of the world’s top producers of agriculture and CAPK’s Migrant Childcare Alternative Payment (MCAP) program provides childcare vouchers for farm working families in mostly rural communities with high Hispanic populations and CAPK’s Food Bank has over 150 partner pantry/commodity sites throughout Kern County, with emphasis in areas that are food deserts and lack access to healthy and fresh foods.

Approximately 18% of Kern County residents live at or below 100% of the Federal Poverty level (U.S. Census estimates, 2021). Of the 11 Kern County cities in the chart below, 8 cities (73%) have poverty higher than the County rate. Additionally, Kern County has one of the highest poverty rates in the State of California. CAPK’s programs and services are strategically located in underserved and/or high poverty areas throughout the county (See Appendix E, CAPK Site List).

## 3. Indicate from which sources your agency collected and analyzed quantitative data for the CNA. (Check all that apply.) (Organizational Standard 3.3)

<table>
<thead>
<tr>
<th>Federal Government/National Data Sets</th>
<th>Local Data Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ Census Bureau</td>
<td>✔ Local crime statistics</td>
</tr>
<tr>
<td>✔ Bureau of Labor Statistics</td>
<td>✔ High school graduation rate</td>
</tr>
<tr>
<td>✔ Department of Housing &amp; Urban Development</td>
<td>✔ School district school readiness</td>
</tr>
<tr>
<td>✔ Department of Health &amp; Human Services</td>
<td>✔ Local employers</td>
</tr>
<tr>
<td>☐ National Low-Income Housing Coalition</td>
<td>☐ Local labor market</td>
</tr>
<tr>
<td>☐ National Center for Education Statistics</td>
<td>☐ Childcare providers</td>
</tr>
<tr>
<td>☐ Academic data resources</td>
<td>☐ Public benefits usage</td>
</tr>
<tr>
<td></td>
<td>✔ County Public Health Department</td>
</tr>
<tr>
<td></td>
<td>☐ Other</td>
</tr>
</tbody>
</table>
☐ Other online data resources
☐ Other
<table>
<thead>
<tr>
<th>California State Data Sets</th>
<th>Agency Data Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Development Department</td>
<td>☑ Client demographics</td>
</tr>
<tr>
<td>Department of Education</td>
<td>☑ Service data</td>
</tr>
<tr>
<td>☑ Department of Public Health</td>
<td>☑ CSBG Annual Report</td>
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<tr>
<td>☑ Attorney General</td>
<td>☑ Client satisfaction data</td>
</tr>
<tr>
<td>☑ Department of Finance</td>
<td>☑ Other</td>
</tr>
<tr>
<td>☑ State Covid-19 Data</td>
<td></td>
</tr>
<tr>
<td>☑ Other</td>
<td></td>
</tr>
</tbody>
</table>

**Surveys**
- Clients
- Partners and other service providers
- General public
- ☑ Staff
- Board members
- ☑ Private sector
- Public sector
- ☑ Educational institutions

4. If you selected “Other” in any of the data sets in Question 4, list the additional sources.

N/A

5. Indicate the approaches your agency took to gather qualitative data for the CNA. (Check all that apply.) (Organizational Standard 3.3)

**Surveys**
- Clients
- Partners and other service providers
- General public
- ☑ Staff
- Board members
- ☑ Private sector
- Public sector
- ☑ Educational institutions

**Focus Groups**
- Local leaders
- Elected officials
- Partner organizations’ leadership
- Board members
- ☑ New and potential partners
- Clients
- Staff

**Interviews**
- Local leaders
- ☑ Elected officials
- Partner organizations’ leadership
- Board members
- New and potential partners
- Clients

**Community Forums**
- ☑ Other

**Asset Mapping**
- ☑ Other
6. If you selected “Other” in Question 6, please list the additional approaches your agency took to gather qualitative data.

N/A

7. Describe your agency’s analysis of the quantitative and qualitative data collected from low-income individuals and families. (Organizational Standards 1.1, 1.2, 3.3)

Every two years, Community Action Partnership of Kern (CAPK) conducts a Community Needs Assessment (CNA) to identify current and emerging needs for Kern County low-income people and families. As part of the Results Orientated Management & Accountability (ROMA) model, the CNA, as well as other organizational information is used to identify priority community needs and as a guide in creating CAPK’s strategic goals and a foundation for continuous improvement. Client input is a critical part of the CNA. For the full analysis of the client responses of the 2023 Community Needs Survey, please see Appendix C.

8. Summarize the data gathered from each sector of the community listed below and detail how your agency used the information to assess needs and resources in your agency’s service area(s). Your agency must demonstrate that each sector was included in the needs assessment; A response for each sector is required. (CSBG Act Sections 676(b)(3)(C), 676(b)(9), Organizational Standard 2.2)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Community-based organizations</td>
<td>Community-based organizations: Community Based Organizations (CBO’s) are essential to the mission of Community Action Partnership. CAPK works together with more than 1,500 CBO partners in Kern County to track referrals via 2-1-1, the Coordinated Homeless Entry Program, case management referral reports, and quality surveys at the program level. Data from the Community Needs Assessment shows that Community Based Organizations strongly believe that affordable housing assistance is needed in the county.</td>
</tr>
<tr>
<td>B. Faith-based organizations</td>
<td>Faith-based organizations: CAPK has many collaborations with faith-based organizations that provide valuable information to assist in identifying needs for low-income residents and families. For example, the CAPK Food Bank partners with approximately 150 food distribution commodity and pantry sites throughout Kern County, many of which are faith-based organizations. Data collected from these partner sites assists CAPK in identifying high need areas for additional services/support.</td>
</tr>
</tbody>
</table>
The following services are the top three responses by faith-based organizations when asked what services are most needed in the community: homeless assistance, affordable housing, and job skills training.

C. Private sector (local utility companies, charitable organizations, local food banks)

CAPK receives abundant support and partnership opportunities with private sector companies and foundations, this includes banking institutions to support their CRA, agricultural growers, energy and oil-based companies, and utility assistance service providers. Typically, CAPK shares information with private sector partners about client needs as well as gathering data. Shared information allows CAPK to strengthen/expand existing programs as well as start new programs. For example, when our agency was conducting a feasibility study on a Community Development Financial Institution (CDFI), we worked with approximately 13-15 partners ranging from banking institutions, small business development corporations, higher education institutions, BIPOC and women business owners and operators, and capital fund investment groups. This combination of partners allowed our agency to incorporate real-time experiences to support the qualitative data from the study, and equally important, aligned our client needs with the partner’s service delivery model. Through the sharing of this information, we are able to better align their goals with our needs, much of which came back to CAPK to serve our clients.

Survey responses from private sectors showed that the highest need for the community is affordable childcare for Kern County residents.

D. Public sector (social services departments, state agencies)

Public sector (social services departments, state agencies): CAPK is a strong partner with local and state agencies and relies on feedback and shared information to better serve our clients. Low paying wage jobs, lack of education opportunities, lack of access to healthcare facilities, lack of affordable housing and many other conditions and causes of poverty are issues that affect all of Kern County and shared data between non-profits and public agencies assists in developing/expanding services to marginalized communities that have the greatest needs. The CNA also draws heavily on local, state, and federal reports and data in need identification for the CNA. Further, through our various contracts and agreements (full detail of contracts available CAPK Schedule of Programs), we are able to partner to address immediate needs, such as gang violence and intervention services, food insecurity with capital funds to support the expansion of the food bank, state-based Medi-Cal enrollment, and home-visiting services for Cal-Works mothers.

Public sectors top three needs for Kern County were: substance abuse treatment, mental health treatment, and affordable housing.
E. Educational institutions (local school districts, colleges)

Educational institutions (local school districts, colleges): Partnerships with educational institutions are an important area for assessing and meeting needs for our low-income community. As in the other areas listed above, these partnerships allow CAPK to gather information about community needs in relationship to improving educational attainment for our youth and adults served. For example, through information gathered from these partners, the CNA identified that there is a great need for vocational and job skills training for low-income adults in Kern County. Most recently, CAPK partnered with the Kern Community College District (KCCD) on a statewide economic and workforce development initiative, Communities Economic Resilience Fund (CERF) through Senate Bill 162 to apply an equity-centric, nontraditional approach to a post-pandemic economic recovery that leads to quality jobs and family-sustaining careers.

Participating educational institutes in CAPK’s Community Needs Assessment expressed mental health treatment as the highest area of concern for the county.

9. “Causes of poverty” are the negative factors that create or foster barriers to self-sufficiency and/or reduce access to resources in communities in which low-income individuals live. After review and analysis of the data, describe the causes of poverty in your agency’s service area(s). (Organizational Standard 3.4)

The CNA (Appendix C) discusses the following causes of poverty:
- Unemployment / Workforce Development
- Educational Attainment
- Homelessness / At-Risk of Homelessness
- Food Insecurity
- Health
- Disconnected Youth

10. “Conditions of poverty” are the negative environmental, safety, health and/or economic conditions that may reduce investment or growth in communities where low-income individuals live. After review and analysis of the data, describe the conditions of poverty in your agency’s service area(s). (Organizational Standard 3.4)

The CNA (Appendix C) discusses the following conditions of poverty:
- Housing
- Affordable Childcare
- Access to Health Services
- Environmental Health—Air Quality

11. Describe your agency’s approach or system for collecting, analyzing, and reporting customer satisfaction data to the governing board. (Organizational Standard 1.3)
In May of 2023, CAPK added a client survey to our agency’s website. The survey will include four questions that assess if client’s needs were met, their rating of CAPK’s services (1 through 5, with 5 being the highest score), whether or not they would recommend our services to anyone, and a free response section that allows them to share feedback. Responses will be shared on quarterly basis in our Board of Director’s meetings.
Community Needs Assessment Results
CSBG Act Section 676(b)(11)
California Government Code Section 12747(a)
State Plan 14.1a

Table 1: Needs Table

Complete the table below. Insert row(s) if additional space is needed.

<table>
<thead>
<tr>
<th>Needs Identified</th>
<th>Level</th>
<th>Agency Mission (Y/N)</th>
<th>Currently Addressing (Y/N)</th>
<th>Agency Priority (Y/N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable Housing</td>
<td>Community</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Mental Health Treatment</td>
<td>Family</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Nutritious Food</td>
<td>Family</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>After-School Programs</td>
<td>Community</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Homeless Services</td>
<td>Community</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

Needs Identified: List the needs identified in your most recent CNA.

Level: List the need level, i.e., community or family. Community Level: Does the issue impact the community, not just clients or potential clients of the agency? For example, a community level employment need is: There is a lack of good paying jobs in our community. Family Level: Does the need concern individuals/families who have identified things in their own life that are lacking? An example of a family level employment need would be: Individuals do not have good paying jobs.

Essential to Agency Mission: Indicate if the identified need aligns with your agency’s mission.

Currently Addressing: Indicate if your agency is already addressing the identified need.

Agency Priority: Indicate if the identified need will be addressed either directly or indirectly.
### Table 2: Priority Ranking Table

List all needs identified as an agency priority in Table 1. Insert row(s) if additional space is needed.

<table>
<thead>
<tr>
<th>Agency Priorities</th>
<th>Description of programs, services, activities</th>
<th>Indicator(s) or Service(s) Category</th>
<th>Why is the need a priority?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Nutritious Food</td>
<td>CAPK Food Bank, CalFresh, Head Start Central Kitchen</td>
<td>FNPI, SRV</td>
<td>Addresses food insecurity concerns</td>
</tr>
<tr>
<td>2. Homeless Services</td>
<td>M Street Homeless Navigation Center, Coordinated Entry Services, Member Bakersfield, Kern Regional Homeless Collaborative</td>
<td>FNPI</td>
<td>Homeless intervention and prevention and homeless assistance address key barriers that impact welfare and wellbeing</td>
</tr>
<tr>
<td>3. After School/Summer Recreation</td>
<td>Friendship House and Shafter Youth Centers</td>
<td>FNPI, SRV</td>
<td>Access to social, emotional, and educational opportunities for youth</td>
</tr>
<tr>
<td>4. Affordable Housing</td>
<td>Member of the Affordable Housing Coalition, Completing a comprehensive Housing Assessment for key populations.</td>
<td>CNPI, FNPI</td>
<td>Family stability and improvement in socioeconomic status</td>
</tr>
<tr>
<td>5. Mental Health Treatment</td>
<td>M Street Navigation</td>
<td>CNPI, FNPI</td>
<td>Improvement of health and wellbeing</td>
</tr>
</tbody>
</table>

**Agency Priorities**: Rank your agency’s planned programs, services and activities to address the needs identified in Table 1 as agency priorities.

**Description of programs, services, activities**: Briefly describe the program, services or activities that your agency will provide to address the need. Identify the number of clients to be served or the number of units offered, including timeframes for each.

**Indicator/Service Category**: List the indicator(s) (CNPI, FNPI) or service(s) (SRV) that will be reported in CSBG Annual Report.

**Why is this need a priority**: Provide a brief explanation about why this need has been identified as a priority. Connect the need with the data. (CSBG Act Section 676(b)(3)(A))
Part II: Community Action Plan
CSBG Act Section 676(b)(11)
California Government Code Sections 12745(e), 12747(a)
California Code of Regulations, Title 22, Division 11, Chapter 1, Sections 100651 and 100655

Vision and Mission Statement

1. Provide your agency’s Vision Statement.
   
   We envision communities where all people have equal opportunities to achieve greater self-sufficiency and attain their version of the American Dream.

2. Provide your agency’s Mission Statement.
   
   Community Action Partnership of Kern will address underlying causes of poverty, alleviate the effects, and promote dignity and self-sufficiency in the communities we serve.
1. Describe your agency’s procedures under which a low-income individual, community organization, religious organization, or representative of low-income individuals that considers its organization or low-income individuals to be inadequately represented on your agency’s board to petition for adequate representation. (CSBG Act Section 676(b)(10))

The Agency is overseen by a 15-member tripartite Board of Directors representing public, private, and low-income sectors who possess diverse backgrounds, educational achievements and certifications, life experiences and skills that assist and enrich the lives of low-income and poverty-level, at risk, hard to serve, and marginalized populations/communities. One-third of Board membership is required to include low-income residents, one-third representing the public sector, and one-third representing the private sector. The Chair of the Head Start Policy Council is one of the five low-income representatives. The remaining low-income representatives are recruited and selected through a democratic process of elections in four areas of the county, as defined by municipal district boundaries of the City of Bakersfield, East, North and South Kern, and one representative from the agency’s Head Start Policy Council.
Service Delivery System

CSBG Act Section 676(b)(3)(A)
State Plan 14.3

1. Describe your agency’s service delivery system. Include a description of your client intake process or system and specify whether services are delivered via direct services or subcontractors, or a combination of both. (CSBG Act Section 676(b)(3)(A), State Plan 14.3)

Currently, each of CAPK’s programs have their own intake and service delivery process, most of which is determined by the funding source. CAPK has implemented a Customer Relations Software (CRM) system which includes universal intake and data collection processes. Through the CRM, CAPK can analyze, track, and use information to manage and improve services, enhance workflow, and collaborate across multiple programs and databases. With the assistance of subject matter experts and technology consultant, Wipfli, we created a technology platform, Microsoft Dynamics, to integrate existing software systems used within the agency to include programs, human resources, finance, and created dedicated systems for CAPK programs. We now have standardized aggregate reporting and assess programs based on data; track and monitor all clients of the Agency, despite which program services they use; report to current and potential funders, stakeholders, and the Board of Directors on the agency’s performance holistically – and can change the service delivery models to respond to emergent/shifting community needs.

2. Describe how the poverty data related to gender, age, and race/ethnicity referenced in Part I, Question 1 informs your service delivery and strategies in your service area?

Poverty, race, and gender are important factors that inform our service delivery efforts and strategies. When designing programs or improving programs, CAPK considers the unique challenges faced by each group in Kern County.

When considering poverty, CAPK looks for ways to address economic inequalities and provide targeted support for individuals and families experiencing financial hardships. Our poverty-focused initiatives have included access to Medi-Cal, rental assistance, and a grant application to provide guaranteed income to low-income individuals. Guaranteed income pilot programs traditionally provide unconditional, individual, regular cash payments intended to support the basic needs of the recipients.

Race informs program design by recognizing the historical and systemic barriers faced by marginalized racial and ethnic groups, such as those faced in the Southeast community of Bakersfield and rural cities in the county. CAPK is an equal employment opportunity employer, and our procurement and contracting policies include special consideration for minority-owned businesses. Additionally, CAPK provides culturally sensitive approaches and diverse representation in each of our 19 programs.
At CAPK, gender-focused programs focus on promoting equality and addressing underrepresentation concerns. We promote gender equality by servicing women and the specifically unique challenges faced by low-income women. Our Women Infant and Children program is one example of a gender-focused program that improves access to education and healthcare.

Incorporating poverty, race, and gender perspectives into CAPK’s program design helps identify and address systemic inequities. It ensures that programs are responsive to the specific needs of different groups and work towards achieving social justice. Moreover, engaging communities affected by poverty, racial disparities, and gender inequalities in the design process helps create more inclusive and effective programs that can uplift marginalized populations.
Linkages and Funding Coordination

CSBG Act Sections 676(b)(1)(B) and (C); (3)(B), (C) and (D); 676(b)(4), (5), (6), and (9)
California Government Code Sections 12747, 12760
Organizational Standards 2.1, 2.4
State Plan 9.3a, 9.3b, 9.4b, 9.6, 9.7, 14.1b, 14.1c, 14.3d, 14.4

1. Describe how your agency coordinates funding with other providers in your service area. If there is a formalized coalition of social service providers in your service area, list the coalition(s) by name and methods used to coordinate services/funding. (CSBG Act Sections 676(b)(1)(C), 676(b)(3)(C); Organizational Standard 2.1; State Plan 14.1c, 9.6, 9.7)

CAPK coordinates funding with a number of agencies and partners. For example, the CAPK VITA program has an active contract with United Way Kern County (subcontractor for the IRS grant) to assist with providing VITA services. This is the fifth year of this partnership. CAPK also shares funding with Community Services and Employment, Tulare (CSET) to provide CalEITC education and outreach services, funded through California Community Services & Development. CAPK and CSET are in the third year of this contract.

CAPK is an active member of the Bakersfield Kern Regional Homeless Collaborative, Coordination of Care (CoC) group for Kern County homeless services. CAPK received funding through the CoC via HUD, to provide the Centralized Intake Services (CES) for Kern County.

CAPK is also an active member of the Family Resource Center (FRC) & Collaboratives. This collaborative includes 16 (FRC) throughout the county, including our East Kern and Oasis FRC.

2. Provide information on any memorandums of understanding and/or service agreements your agency has with other entities regarding coordination of services/funding. (CSBG Act Section 676(b)(9), Organizational Standard 2.1; State Plan 14.1c, 9.6, 9.7)

CAPK is a lead agency and strong partner in the communities served. Collaboration and opportunities to partner and/or contract with others strengthens service delivery and positive outcomes for low-income Kern people and families. CAPK has both formal and informal relationships with hundreds of community service agencies, partners, collaboratives, and other organizations from all sectors of the community including "community-based organizations, faith-based organizations, private sector, public sector, and educational institutions." For example, CAPK 2-1-1 Kern has a database of over 3,000 service providers and the CAPK Food Bank partners/contracts with approximately 150 pantry sites to distribute food throughout Kern County.

3. Describe how your agency ensures delivery of services to low-income individuals while avoiding duplication of services in the service area(s). (CSBG Act Section 676(b)(5), State Plan 9.3a, California Government Code 12760)
CAPK continues to stay connected with partners and other agencies. One method that we utilize to avoid local duplication of efforts is to learn about the funding sources that drive our partners’ programs. Before applying for grants, we research past awardees to understand the role that grant funds play in local service delivery efforts. We exercise caution in applying for funding that would duplicate local efforts, especially when another local agency is exceeding in this sector and relies on certain sources to continue their services. Further, as mentioned in previous sections, our program participates in several county-wide and community-level collaboratives to keep connected with developing programs, services, and overall updates from partner organizations.

4. Describe how your agency will leverage other funding sources and increase programmatic and/or organizational capacity. (California Government Code Section 12747)

Continuous leveraging of funding—both monetary and in-kind—along with other support partners and volunteers help CAPK to maintain and grow capacity to serve through its existing 19 diverse programs to assist and empower individuals and families across communities served. CAPK leadership and staff are fully engaged as cooperative and collaborative partners, seeking existing and new opportunities to apply for funding support and partnerships through grants, projects and activities aligned with the agency mission and philosophy and purpose to end and improve lives across Kern County.

In January 2021, CAPK created a Foundation to support fundraising of gap funding and grow unrestricted funding capacity as described in Goal 6 of the Strategic Plan.

An example is the CAPK Foundation. As the philanthropic support to Community Action Partnership of Kern, the CAPK Foundation is dedicated to addressing the immediate funding needs of the agency and to serve as a catalyst by supporting the essential tools and resources we provide to the community. The Foundation supports programs that have funding gaps or funding limitations by delivering a comprehensive scope of services through philanthropic fundraising. This resource was leveraged as we began fundraising for the Food Bank Capital Expansion totaling $15.6 Million in construction funds. The agency and the Foundation were able to source nine (9) lines of funding, consisting of city, county, state-departments, federal allocation, and philanthropic dollars through a local grower. The project is underway and did not require a loan or reliance on the line of credit.

5. Describe your agency’s contingency plan for potential funding reductions. (California Government Code Section 12747)

As noted above, one of the ways the agency has planned to address funding shortfalls is through the creation of the CAPK Foundation, however, for daily operations, the agency has invested efforts in growing the unrestricted fund to support operations in the case of potential funding reductions. This includes reevaluating the internal infrastructure and continuous improvement, in addition to pursuing grant funding outside of committed contracts.
6. Describe how your agency documents the number of volunteers and hours mobilized to support your activities. (Organizational Standard 2.4)

Our agency document volunteers and in-kind support through our Volunteer Management platform. This digital format of managing volunteers allows the agency to ensure compliance, track individual volunteer hours, and manage events on a mid-to-large scale. It also allows the agency the opportunity to enhance our visibility among partners, clients, community members, and investors as well as use a potential recruitment tool. The platform is used to validate volunteer hours and supports reporting in our CSBG annual report.

7. Describe how your agency will address the needs of youth in low-income communities through youth development programs and promote increased community coordination and collaboration in meeting the needs of youth. (CSBG Act Section 676(b)(1)(B), State Plan 14.1b)

Most of our programs focus on youth 0-17 years old, ranging from our Head Start, family resource centers, youth center programs. In addition to our current service offerings, the agency actively pursues funding to support enhancement of services and/or development of new services based on the site and community needs. This is demonstrated through our First 5 and Department of Human Services – Differential Response contract (ending June 2023), administered by our two-Family Resource Centers in Mojave and Ridgecrest. These programs are designed to provide wraparound case management for children and guardians, child-centered educational home base activities, summery bridge activities, and family support services with children five years old and younger.

8. Describe how your agency will promote increased community coordination and collaboration in meeting the needs of youth, and support development and expansion of innovative community-based youth development programs such as the establishment of violence-free zones, youth mediation, youth mentoring, life skills training, job creation, entrepreneurship programs, after after-school childcare. (CSBG Act Section 676(b)(1)(B), State Plan 14.1b)

CAPK supports innovative community-based youth development through our Adult Re-Entry (ARG) Program. Through this program, we deliver reentry services for people formerly incarcerated in state prison. The target population identified in AB 128 are people, who have been formerly incarcerated in state prison with priority being given to those recently released and/or on state parole. Through our 19 direct service programs, CAPK supports this population with food insecurity, housing, utility assistance, and much more, in efforts to address the multitude of factors that impact recidivism.

9. Describe the coordination of employment and training activities as defined in Section 3 of the Workforce and Innovation and Opportunity Act [29 U.S.C. 3102]. (CSBG Act Section 676(b)(5); State Plan 9.4b)

The agency has partnered with service providers that offer and or lead workforce development programs, as is the case of the CERF program with KCCCD, as mentioned in a previous section.
Internally, through the Volunteer Income Tax Assistance (VITA) program, we offer 40-hours of IRS-certified training, which helps promote tax preparation training and a pathway into a viable career. Additionally, we can often recruit qualified, skilled volunteers to become agency employees. Lastly, we continually pursue funding opportunities that can create a workforce and training pathway for our clients which includes partnering with local job-development agencies. Staff help lead or contribute to research as well as hosting community engagement meetings.

10. Describe how your agency will provide emergency supplies and services, nutritious foods, and related services, as may be necessary, to counteract conditions of starvation and malnutrition among low-income individuals. (CSBG Act Section 676(b)(4), State Plan 14.4)

Since the last CAP was published, CAPK has automated some of our Food Bank service delivery efforts to reduce and prevent food insecurity. In April of 2023, we implemented an online portal for pantry sites to “check out” food from our food bank. The portal allows them to schedule a time for pick up. Food Bank staff collect all the items requested and have them boxed and ready for pick up at the designated time. As a result of this update, CAPK is now able to work with more pantry sites. Pantry sites require less time at the food bank, thereby increasing the number of pounds that are distributed locally. Further, our agency and programs, like the Food Bank, has the capacity and infrastructure (including loading docks) to receive emergency inventory and distribute to community members quickly, this was evident during the pandemic when we received high-volume inventory (ranging from food, PPE, supplies, diapers, and formula). We will increase our capacity with the capital expansion set to be completed by Fall 2023.

11. Describe how your agency coordinates with other antipoverty programs in your area, including the emergency energy crisis intervention programs under Title XXVI, relating to low-income home energy assistance (LIHEAP) that are conducted in the community. (CSBG Act Section 676(b)(6))

Our agency does not coordinate services with emergency energy crisis intervention programs.

Our Energy Assistance programs provided benefits to 2,593 families, helping them keep their power on during the sweltering summer months and the chill of winter. During 2022, we distributed $2,628,259 million dollars in funding from the federal Low-Income Home Energy Assistance Program to those families to ensure they could keep their homes habitable.

12. Describe how your agency coordinates services with your local LIHEAP service provider?

Our agency does not coordinate services with local LIHEAP service providers.
13. Describe how your agency will use funds to support innovative community and neighborhood-based initiatives, which may include fatherhood and other initiatives, with the goal of strengthening families and encouraging effective parenting. (CSBG Act Section 676(b)(3)(D), State Plan 14.3d)

Our agency will use funds to support initiatives focused on strengthening families and encouraging effective parenting through our Differential Response contract (ending June 2023). This contract is administered by our two-Family Resource Centers in Mojave and Ridgecrest. These programs are designed to provide wraparound case management for children and guardians, child-centered educational home base activities, summery bridge activities, and family support services with children five years old and younger. The services focus on improving parent’s knowledge of trauma and adverse effects to promote protective and nurturing behaviors.

14. Describe how your agency will develop linkages to fill identified gaps in the services, through the provision of information, referrals, case management, and follow-up consultations. (CSBG Act Section 676(b)(3)(B), State Plan 9.3b)

Our agency develops linkages to fill gaps and needs through Inter-agency Referral Management. The purpose of the Interagency Referral System is to connect clients to all CAPK programs for which they are eligible and improve program referral efficiency, determine eligibility quickly, and provide real-time access to client information during the referral process. This is helpful to ensure we provide as many resources as possible to clients that qualify for our programs and assist in analyzing client or household trends and behavior to make informed decisions on our services and delivery model, in addition to client feedback. There is a Quality Control component that will ensure referrals move through the system efficiently. It is the intent to expand the referral process to external partners in the coming year(s).
# Monitoring

**CSBG Act Section 678D(a)(1)(A) and (B)**

1. Describe how your agency’s monitoring activities are related to establishing and maintaining the integrity of the CSBG program. Include your process for maintaining high standards of program and fiscal performance.

CAPK has implemented a comprehensive Customer Relations Management (CRM) software system, that allows the Agency to collect, monitor, and report client data and outcomes across all programs. There is a comprehensive record of each client/family that accesses CAPK as they move through our programs and staff will be able to see progress and report outcomes in real time. This allows CAPK to gain meaningful insights in how our families access services, length of stay, and exit information. Real-time data reporting is part of our efforts to continually monitor and improve client outcomes. This is evidenced through the Program, Review, and Evaluation (PRE) Committee that reports on a program’s performance from the month prior. Through our Information System (IS) team, they work directly with program staff monthly on their client-data reporting as well as validation the client records, which feeds into the annual report.

2. If your agency utilizes subcontractors, please describe your process for monitoring the subcontractors. Include the frequency, type of monitoring, i.e., onsite, desk review, or both, follow-up on corrective action, and issuance of formal monitoring reports.

CAPK monitors subrecipients in order to provide reasonable assurance that they are in compliance with laws, regulations, and award provisions applicable to the program. Please see Appendix F “Monitoring of Subrecipients” from the CAPK Accounting & Financial Policies and Procedures Manual.
Data Analysis, Evaluation, and ROMA Application
CSBG Act Section 676(b)(12)
Organizational Standards 4.2, 4.3

1. Describe your agency’s method for evaluating the effectiveness of programs and services. Include information about the types of measurement tools, the data sources and collection procedures, and the frequency of data collection and reporting. (Organizational Standard 4.3)

CAPK monitors program progress towards goals through the Program and Division Monthly Reports mentioned previously. These reports have targets specific program indicators and show monthly and annual progress. These reports include indicators (FNPI, SRV etc.) for items that are included in the CSBG Annual Report.

The reports are monitored by the Division Directors and Chief Program Officer so they can make real time responses and adjustments as needed. Additionally, the reports are reviewed at the monthly Program Research & Evaluation Committee meeting and the CAPK Board of Directors meetings for approval. CAPK Finance staff meets with each Program Manager and Division Directors monthly to review budget-to-actual information for each program. This allows for programs to make spending adjustments as needed. All financial reporting is done through Abila.

CSBG data is collected and reported internally twice a year, mid-point, and end of year. The information from the mid-point collection is reviewed to assure that programs are on track with data collection.

2. Applying the Results Oriented Management and Accountability (ROMA) cycle of assessment, planning, implementation, achievement of results, and evaluation, describe one change your agency made to improve low-income individuals’ and families' capacity for self-sufficiency. (CSBG Act Section 676(b)(12), Organizational Standard 4.2)

Using the ROMA model, the agency has invested in the development of the Customer Relationship Management (CRM) platform for the purposes of standardized data collection across all programs under the umbrella of CAPK. This includes incorporating CSBG performance indicators and client demographics to improve collection and review, with the intent to provide comprehensive services once the system is fully implemented.

Furthermore, four individuals received their ROMA Implementer certification this year (2023). Since receiving these certifications, our agency has applied ROMA with program planning, specifically by way of grant applications. Three grant applications have included logic models that demonstrate our thought process for reaching the outcome and impact desired. We have also created a client satisfaction survey that has been added to our agency website. Starting in May of 2023, CAPK implemented an agency-wide client satisfaction form that serves clients of all programs.
3. Applying the full ROMA cycle, describe one change your agency facilitated to help revitalize the low-income communities in your agency’s service area(s). (CSBG Act Section 676(b)(12), Organizational Standard 4.2)

The agency is in the process of applying the ROMA model in evaluating existing programs and it will be used when new programs are reviewed and implemented. Through tools, such as the Program, Review and Evaluation Committee, and the CSBG National Performance Indicators and Services, we are able to review outcomes/goals on a monthly and quarterly basis.
Response and Community Awareness

Diversity, Equity, and Inclusion

1. Does your agency have Diversity, Equity, and Inclusion (DEI) programs in place that promote the representation and participation of different groups of individuals, including people of different ages, races and ethnicities, abilities and disabilities, genders, religions, cultures, and sexual orientations?

☑ Yes
☐ No

2. If yes, please describe.

CAPK seeks to create an inclusive, equitable, culturally competent, and supportive environment where employees feel enriched and have a strong sense of belonging. The Diversity, Equity, and Inclusion Committee (DEI Committee), is a staff led subcommittee of the CAPK Board of Directors that maintains an active role in identifying, understanding, and communicating relevant information about issues pertaining to diversity, equity, and inclusion. The objective of this committee is to establish and strengthen a culturally competent environment in which model behaviors are demonstrated by all members of our working community. The DEI Committee will guide the agency and hold it accountable for the integration of diversity, equity, and inclusion principles and behaviors into all aspects of the workplace and community impact.

3. Does your agency have Diversity, Equity and Inclusion (DEI) policies in place that promote the representation and participation of different groups of individuals, including people of different ages, races and ethnicities, abilities and disabilities, genders, religions, cultures and sexual orientations?

☑ Yes
☐ No

4. If yes, please describe.

Title VII of the Civil Rights Act of 1964
Title VII of the Civil Rights Act of 1964 protects groups historically impacted by discrimination such as minority groups, ethnic groups, religious groups, pregnant women, people with disabilities, persons over 40 years of age, and veterans.

Bilingual Pay
The primary goal of the Bilingual Pay Policy is to provide additional compensation for employees who demonstrate language competencies and will improve how the agency delivers services to our targeted communities. Secondary goals for the Bilingual Pay Policy is to attract more candidates for agency positions requiring bilingual skills, reduce employee turnover rates, and lengthen bilingual employee’s service time with CAPK. The Bilingual Pay Policy applies to all...
employees including full-time, part-time, temporary, and emergency hires that are retained by the organization.

Disaster Preparedness

<table>
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<tr>
<th>1. Does your agency have a disaster plan in place that includes strategies on how to remain operational and continue providing services to low-income individuals and families during and following a disaster? The term disaster is used in broad terms including, but not limited to, a natural disaster, pandemic, etc.</th>
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<tr>
<td>☐ Yes</td>
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2. If yes, when was the disaster plan last updated?

Agency/Operational Approach – An agency plan is currently being drafted.

Community Approach - CAPK has submitted a grant to implement a disaster plan.

Through the California Department of Food and Agriculture -Community Resilience Centers grant, the City of Bakersfield has partnered with CAPK to create a Community Resilience Center. The Friendship House Community Center will be an emergency response/evacuation and medical response center powered through its own solar PV-anchored microgrid. The intent of the project is to provide clean energy resources in Southeast Bakersfield at the Friendship House and serve as an emergency response center to residents. This will be accomplished through adding batteries, microgrids, electrical upgrades, and battery systems to function at an energy efficient capacity. The notice of funding will be released in the summer of 2023.

3. Briefly describe your agency’s main strategies to remain operational during and after a disaster.

Agency/Operational Approach – To be determined.

Community Approach

Re. the Community Resilience Centers - Events during and after a disaster will be managed by the City of Bakersfield, with full support from CAPK in the utilization of and management of the Friendship House Community Center (FHCC). Community services offered by FHCC will continue immediately after the center is no longer necessary as an emergency-response center.
Federal CSBG Programmatic Assurances and Certification
CSBG Act 676(b)

Use of CSBG Funds Supporting Local Activities

676(b)(1)(A): The state will assure “that funds made available through grant or allotment will be used – (A) to support activities that are designed to assist low-income families and individuals, including families and individuals receiving assistance under title IV of the Social Security Act, homeless families and individuals, migrant or seasonal farmworkers, and elderly low-income individuals and families, and a description of how such activities will enable the families and individuals--

i. to remove obstacles and solve problems that block the achievement of self-sufficiency (particularly for families and individuals who are attempting to transition off a State program carried out under part A of title IV of the Social Security Act);

ii. to secure and retain meaningful employment;

iii. to attain an adequate education with particular attention toward improving literacy skills of the low-income families in the community, which may include family literacy initiatives;

iv. to make better use of available income;

v. to obtain and maintain adequate housing and a suitable living environment;

vi. to obtain emergency assistance through loans, grants, or other means to meet immediate and urgent individual and family needs;

vii. to achieve greater participation in the affairs of the communities involved, including the development of public and private grassroots partnerships with local law enforcement agencies, local housing authorities, private foundations, and other public and private partners to

- I. document best practices based on successful grassroots intervention in urban areas, to develop methodologies for wide-spread replication; and

- II. strengthen and improve relationships with local law enforcement agencies, which may include participation in activities such as neighborhood or community policing efforts;

Needs of Youth

676(b)(1)(B) The state will assure “that funds made available through grant or allotment will be used – (B) to address the needs of youth in low-income communities through youth development programs that support the primary role of the family, give priority to the prevention of youth problems and crime, and promote increased community coordination and collaboration in meeting the needs of youth, and support development and expansion of innovative community-based youth development programs that have demonstrated success in preventing or reducing youth crime, such as--

I. programs for the establishment of violence-free zones that would involve youth development and intervention models (such as models involving youth mediation, youth mentoring, life skills training, job creation, and entrepreneurship programs); and

II. after-school childcare programs.
Coordination of Other Programs

676(b)(1)(C) The state will assure “that funds made available through grant or allotment will be used – (C) to make more effective use of, and to coordinate with, other programs related to the purposes of this subtitle (including state welfare reform efforts)

Eligible Entity Service Delivery System

676(b)(3)(A) Eligible entities will describe “the service delivery system, for services provided or coordinated with funds made available through grants made under 675C(a), targeted to low-income individuals and families in communities within the state;

Eligible Entity Linkages – Approach to Filling Service Gaps

676(b)(3)(B) Eligible entities will describe “how linkages will be developed to fill identified gaps in the services, through the provision of information, referrals, case management, and follow-up consultations.”

Coordination of Eligible Entity Allocation 90 Percent Funds with Public/Private Resources

676(b)(3)(C) Eligible entities will describe how funds made available through grants made under 675C(a) will be coordinated with other public and private resources.”

Eligible Entity Innovative Community and Neighborhood Initiatives, Including Fatherhood/Parental Responsibility

676(b)(3)(D) Eligible entities will describe “how the local entity will use the funds [made available under 675C(a)] to support innovative community and neighborhood-based initiatives related to the purposes of this subtitle, which may include fatherhood initiatives and other initiatives with the goal of strengthening families and encouraging parenting.”

Eligible Entity Emergency Food and Nutrition Services

676(b)(4) An assurance “that eligible entities in the state will provide, on an emergency basis, for the provision of such supplies and services, nutritious foods, and related services, as may be necessary to counteract conditions of starvation and malnutrition among low-income individuals.”

State and Eligible Entity Coordination/linkages and Workforce Innovation and Opportunity Act Employment and Training Activities

676(b)(5) An assurance “that the State and eligible entities in the State will coordinate, and establish linkages between, governmental and other social services programs to assure the effective delivery of such services, and [describe] how the State and the eligible entities will coordinate the provision of employment and training activities, as defined in section 3 of the Workforce Innovation and Opportunity Act, in the State and in communities with entities providing activities through statewide and local workforce development systems under such Act.”

State Coordination/Linkages and Low-income Home Energy Assistance

676(b)(6) “An assurance that the State will ensure coordination between antipoverty programs in each community in the State, and ensure, where appropriate, that emergency energy crisis intervention programs under title XXVI (relating to low-income home energy assistance) are conducted in such community.”
Community Organizations

676(b)(9) An assurance “that the State and eligible entities in the state will, to the maximum extent possible, coordinate programs with and form partnerships with other organizations serving low-income residents of the communities and members of the groups served by the State, including religious organizations, charitable groups, and community organizations.”

Eligible Entity Tripartite Board Representation

676(b)(10) “[T]he State will require each eligible entity in the State to establish procedures under which a low-income individual, community organization, or religious organization, or representative of low-income individuals that considers its organization, or low-income individuals, to be inadequately represented on the board (or other mechanism) of the eligible entity to petition for adequate representation.”

Eligible Entity Community Action Plans and Community Needs Assessments

676(b)(11) “[A]n assurance that the State will secure from each eligible entity in the State, as a condition to receipt of funding by the entity through a community service block grant made under this subtitle for a program, a community action plan (which shall be submitted to the Secretary, at the request of the Secretary, with the State Plan) that includes a community needs assessment for the community serviced, which may be coordinated with the community needs assessment conducted for other programs.”

State and Eligible Entity Performance Measurement: ROMA or Alternate System

676(b)(12) “[A]n assurance that the State and all eligible entities in the State will, not later than fiscal year 2001, participate in the Results Oriented Management and Accountability System, another performance measure system for which the Secretary facilitated development pursuant to section 678E(b), or an alternative system for measuring performance and results that meets the requirements of that section, and [describe] outcome measures to be used to measure eligible entity performance in promoting self-sufficiency, family stability, and community revitalization.”

Fiscal Controls, Audits, and Withholding

678D(a)(1)(B) An assurance that cost and accounting standards of the Office of Management and Budget (OMB) are maintained.

☐ By checking this box and signing the Cover Page and Certification, the agency’s Executive Director and Board Chair are certifying that the agency meets the assurances set out above.
State Assurances and Certification
California Government Code Sections 12747(a), 12760, 12768

For CAA, MSFW, NAI, and LPA Agencies

California Government Code § 12747(a): Community action plans shall provide for the contingency of reduced federal funding.

California Government Code § 12760: CSBG agencies funded under this article shall coordinate their plans and activities with other agencies funded under Articles 7 (commencing with Section 12765) and 8 (commencing with Section 12770) that serve any part of their communities, so that funds are not used to duplicate particular services to the same beneficiaries and plans and policies affecting all grantees under this chapter are shaped, to the extent possible, so as to be equitable and beneficial to all community agencies and the populations they serve.

☐ By checking this box and signing the Cover Page and Certification, the agency’s Executive Director and Board Chair are certifying the agency meets assurances set out above.

For MSFW Agencies Only

California Government Code § 12768: Migrant and Seasonal Farmworker (MSFW) entities funded by the department shall coordinate their plans and activities with other agencies funded by the department to avoid duplication of services and to maximize services for all eligible beneficiaries.

☐ By checking this box and signing the Cover Page and Certification, the agency’s Executive Director and Board Chair are certifying the agency meets assurances set out above.
Organizational Standards

Category One: Consumer Input and Involvement

Standard 1.1 The organization/department demonstrates low-income individuals’ participation in its activities.

Standard 1.2 The organization/department analyzes information collected directly from low-income individuals as part of the community assessment.

Standard 1.3 (Private) The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.

Standard 1.3 (Public) The department has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the tripartite board/advisory body, which may be met through broader local government processes.

Category Two: Community Engagement

Standard 2.1 The organization/department has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.

Standard 2.2 The organization/department utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.

Standard 2.4 The organization/department documents the number of volunteers and hours mobilized in support of its activities.

Category Three: Community Assessment

Standard 3.1 (Private) Organization conducted a community assessment and issued a report within the past 3 years.

Standard 3.1 (Public) The department conducted or was engaged in a community assessment and issued a report within the past 3-year period, if no other report exists.

Standard 3.2 As part of the community assessment, the organization/department collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).
Standard 3.3 The organization/department collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment.

Standard 3.4 The community assessment includes key findings on the causes and conditions of poverty and the needs of the communities assessed.

Standard 3.5 The governing board or tripartite board/advisory body formally accepts the completed community assessment.

Category Four: Organizational Leadership

Standard 4.1 (Private) The governing board has reviewed the organization’s mission statement within the past 5 years and assured that:

1. The mission addresses poverty; and
2. The organization’s programs and services are in alignment with the mission.

Standard 4.1 (Public) The tripartite board/advisory body has reviewed the department’s mission statement within the past 5 years and assured that:

1. The mission addresses poverty; and
2. The CSBG programs and services are in alignment with the mission.

Standard 4.2 The organization’s/department’s Community Action Plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.

Standard 4.3 The organization’s/department’s Community Action Plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.
### Appendices

Please complete the table below by entering the title of the document and its assigned appendix letter. Agencies must provide a copy of the Notice(s) of Public Hearing and the Low-Income Testimony and the Agency’s Response document as appendices A and B, respectively. Other appendices such as the community need assessment, surveys, maps, graphs, executive summaries, analytical summaries are encouraged. All appendices should be labeled as an appendix (e.g., Appendix A: Copy of the Notice of Public Hearing) and submitted with the CAP.

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<tr>
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...
Community Action Partnership of Kern (CAPK) Invites Public Feedback on the CAPK Community Action Plan 2024-2025

FOR IMMEDIATE RELEASE:

June 5, 2023

Bakersfield, CA - Community Action Partnership of Kern (CAPK), a leading non-profit organization dedicated to empowering individuals and families in Kern County, is pleased to announce that it will be accepting public comments on the DRAFT CAPK Community Action Plan for the years 2024-2025. This initiative aims to foster community engagement and ensure that the needs and aspirations of residents are reflected in the final plan.

The public comment session will be held at the Friendship House Community Center, located at 2424 South Martin Luther King Blvd. in Bakersfield, CA from 5:30 P.M. – 6:30 P.M., participants are encouraged to join the meeting, which will take place in the back classroom module. The event will provide an opportunity for community members, stakeholders, and partners to contribute their insights, suggestions, and concerns regarding the proposed Community Action Plan.

For those unable to attend the meeting in person, CAPK is offering a virtual option to participate. Individuals can join the Zoom meeting by logging on to the zoom link: https://us06web.zoom.us/j/86563267688?pwd=NDRkbFFTZ1R4Z3V5OHFyZiIiDRGs2Zz09. This virtual option ensures that all interested parties, regardless of their location or circumstances, can have their voices heard and actively contribute to shaping the Community Action Plan.

The DRAFT CAPK Community Action Plan 2024-2025 is a comprehensive framework designed to address critical issues and improve the well-being of individuals and families in Kern County. It outlines strategies, objectives, and initiatives that CAPK will undertake to provide vital services, including education, employment, housing, health, and nutrition, to those in need.

CAPK is committed to creating an inclusive, equitable, and resilient community, and the organization recognizes that public participation is essential in achieving this goal. The input received during the public comment process will play a vital role in shaping the final CAPK Community Action Plan 2024-2025, which will guide the organization's efforts in making a positive impact on the lives of individuals and families in Kern County. To preview the plan visit: Microsoft Word - FINAL 2024-2025 CNA & CAP Template 12-6-2022 (1) (exactdn.com)

Media partners can get more information by contacting:
Savannah Maldonado, MPA
Advocacy and Public Relations Manager of Community Development
smaldonado@capk.org
(661) 496-9035

###

About Community Action Partnership of Kern
Community Action Partnership of Kern (CAPK) was established in 1965 and administers 19 programs aimed at meeting children, families and individuals at their point of need. CAPK is one of more than 1,000 Community Action agencies nationwide and is one of Kern County's largest nonprofit 501(c) (3) corporations. We work in collaboration with other human services agencies and organizations to help low-income residents pursue their educational goals, secure and retain employment, maintain adequate housing, access medical services, obtain utility bill payment subsidies and residential weatherization assistance, counteract hunger and food insecurity, obtain child care and preschool education, and engage in personal and family development opportunities to build and achieve individual and family self-sufficiency. For more information, please visit www.capk.org or search for Community Action Partnership of Kern on Facebook, Twitter and Instagram.
KGET (NBC) - Bakersfield, CA
17 News at 6

KGET 6/5/2023 6:25:02 PM: ...the amount of pain associated with wound care. tami: let your voice be heard on critical issues in kern county such as education, employment, housing, health and more. the Community action partnership of kern, or cap-k, is inviting people to make public comments on the draft cap-k Community action plan. the initiative aims to foster community engagement and ensure the needs and aspirations of residents are reflected in the final plan. it's happening at the friendship house community center at 5:30 p.m. on june 8. you can also attend virtually via zoom. karen: celebrate juneteenth at allensworth state park with featured guest, author marilyn nelson. juneteenth is a federal holiday that commemorates june 19, 1865, when slaves in texas were proclaimed free. nelson's books include "a wreath for emmett till," "carver," "american ace," "how i discovered poetry," and more. the event at allensworth takes place from 10 in the morning until 4 in the afternoon. allensworth, the first town founded, financed and governed by black settlers, is an hour north of bakersfield via car or amtrak. the festivities will include tours of some of the 20 historic buildings, history talks, music, food and arts and crafts for sale. tami: still ahead... hundreds play hookie for a day on the water... karen: more on this "unofficial" holiday on the florida coast.. when we come back. karen: hundreds of boaters ...
<table>
<thead>
<tr>
<th>Name</th>
<th>Comment</th>
<th>Addressed in the CAP?</th>
<th>Agency Response if Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wendell Wesley</td>
<td>I'm a big fan of Dave Ramsey. I don’t know him personally, but he does a financial lease course. I think people in our community would benefit greatly if we were able to provide that for people here because the thing is in these lower income communities, people really haven't had the opportunity to learn how to save and invest and why it's so important to learn at an early age. We really need to start teaching our children that way before graduation cause by then usually it's too late.</td>
<td>N/A</td>
<td>Research needed</td>
</tr>
<tr>
<td>Pam Haring</td>
<td>Well, I was just kind of wondering how you how they verify what the needs are of like my participants at my tanaff organization, let's say if they come into a food bank, how do they know what their needs are to come to you to do the Instacart to get that food there that is needed?</td>
<td>Yes</td>
<td>Confirmed that the pantry sites are selecting food items through the Food Bank’s online portal.</td>
</tr>
<tr>
<td>Michelle Jara-Rangel</td>
<td>I'd really like to see some more data about our Native American communities and especially now, since we have a recognized tribe in Kern County.. one of the big pushes that I've been... During different conventions and stuff is push for CAP agencies to partner more with more with American positions.</td>
<td>No</td>
<td>The team requested data on this population to inform prospective services or programs.</td>
</tr>
<tr>
<td>Angel Galvez</td>
<td><em>Regarding community awareness of CAPK services</em> - You know the local police departments could be a really good avenue for this. The chiefs of police are obviously there to really engage in these types of conversations and not that we don't need them. But one strategy is of course to reach out and do perhaps a community meeting where the chief of police is inviting the community to come and collaborate together with you. Often, elderly people will show up because the police are appointed to the council that’s voted in. Thus, you know you have a large population, and it could have a lot of power behind it to get people to show up. Those town halls are going to be a good a good avenue. to present your survey.</td>
<td>N/A</td>
<td>None Needed</td>
</tr>
<tr>
<td>Name</td>
<td>Comment</td>
<td>Addressed in the CAP?</td>
<td>Agency Response if Applicable</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Angel Galvez</td>
<td>Regarding community awareness of CAPK services - You guys have been a great partner and I appreciate the efforts and communication. If you guys operate with, however, that is many other media agencies like you. And this part is so important, so vital, and you're touching so many lines for us all. And so that's very.</td>
<td>N/A</td>
<td>None Needed</td>
</tr>
<tr>
<td>Jeffery Stidham</td>
<td>I mean, churches have you know, they have a governing body themselves, and they have their own agenda. And there's this whole separation of church and state, but we have a large catholic community here. We have a large Christian Protestant. We have a lot of people still going to church despite what's happening in this society. And you know, if we can get these pastors. There's a lot of people in the Body of Christ they want. They'll do canvassing, you know.</td>
<td>Yes</td>
<td>Partnerships with faith-based organizations are described in our report.</td>
</tr>
<tr>
<td>Hilda Stidham</td>
<td>Regarding involvement of churches in our community - There's a small one in Oildale Open Gate. They just opened two years ago. And the pastor there is awesome. They go out to the river out. They feed the homeless and talk to them. I think you know clinical services goes out there and helps the homeless.</td>
<td>Yes</td>
<td>Partnerships with faith-based organizations are described in our report.</td>
</tr>
<tr>
<td>Ana Vigil</td>
<td>I want the Fatherhood Program back. Even if we can’t bring the whole program back, you know, find a way to where we can integrate it with our Head Start program. It is very important for you know our male figures to be involved with our children. I went to a conference in Atlanta, and they talked about how some kids were like really getting out of hand and they were out of control, they need to know what to do, and somebody had suggested hey why don’t we give them male figures. The mothers are always involved and involving male figures will improve the kid's behavior.</td>
<td>Yes</td>
<td>Parenting programs are discussed in the “Linkages and Funding Coordination” of our report. Fatherhood specific programming is currently being researched.</td>
</tr>
</tbody>
</table>
Community Action Partnership of Kern
Community Needs Assessment, 2023

The Promise of Community Action

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

Every two years, Community Action Partnership of Kern (CAPK) conducts a Community Needs Assessment (CNA) to identify current and emerging needs for Kern County low-income individuals and families. As part of the Results Orientated Management & Accountability (ROMA) model, the CNA and other organizational information is used to complete the Community Action Plan (CAP) and to develop CAPK’s strategic goals and as a foundation for continuous improvement.

Approach and Methods

The CNA is completed through a collection and analysis of data and information from the following sources:

- **US Census and Literature Review**: CAPK performs extensive research of secondary data sources such as the Bakersfield Kern Homeless Collaborative, Feeding America, US Department of Human Services, CA Department of Labor, the Kern Community Health Needs Assessment, and numerous studies and reports. This information is used to gain overall community context and to assist in the development of the CAPK Community Needs Surveys.

- **Survey**: CAPK conducts surveys of three groups—CAPK clients, CAPK partners and other community organizations, and CAPK staff & Board Members—to gather information about what services are needed in the community to assist low-income people and families.

- **Interviews & Focus Groups**: These are conducted with CAPK Clients and stakeholders to do a deeper dive into the survey data.
CAPK Programs and CSBG Data: This type of information is used to compare survey and other information to ensure CAPK programs and services are needed in the community.

Priority Areas: Information and data are analyzed to identify top priority community need areas for CAPK strategic planning and continuous improvement.

Key Findings
The following are highlights of the Community Needs Assessment for Kern County:

- 905,644 total population
- 1% average growth over the last 2 years
- 29% of Kern’s population are ages 0-18 years
- 13.9% of Kern’s population are ages 60 and over
- 20% of the population is foreign-born
- $58,824 median household income
- 18% of all residents live at or below 100% of poverty
- 5th highest poverty rate for all California counties
- 8 of 11 (73%) of Kern cities have higher poverty rates than the county
- 43.8% of female-headed households with children live in poverty
- 26% of Kern children ages 0-18 years live in poverty
- 8% of Kern’s working population is unemployed
- 23% of residents with less than a high school education lives in poverty compared to 6.3% of those with a bachelor’s degree or higher
- 1,603 people are homeless in the county
- 97% increase in people who are homeless and since January 2017
- 16% of Kern County residents are food-insecure
- 55% of the census tracts in Kern County meet the requirements of a food desert
- 12.3% of Kern County youth are disconnected from the community
- 54% of Kern renters use well over 30 percent of their income for rent
- $14,196 is the average annual cost per child for full-time infant care
CAPK Service Area: Kern County

CAPK's service area includes all of Kern County, California. CAPK also operates programs in other counties in California including Women, Infants, and Children (WIC) supplemental nutrition program in the communities of Adelanto, Big Bear, Phelan, Needles, and Crestline in San Bernardino County; the Migrant Alternative Payment Childcare program (MCAP) at entry points in the counties of Kern, Tulare, Kings, Fresno, Madera, and Merced; and CAPK 2-1-1 Information and Referral program in Kings, Tulare, Merced, Stanislaus, and Mariposa Counties.

Geography

Although CAPK serves other communities the majority of services are provided in Kern County, which is the focus of this Needs Assessment. Kern County is located in Central California, at the southern end of the San Joaquin Valley. Kern is California’s third-largest county by land area. At 8,172 square miles, Kern is larger than the states of Massachusetts, New Jersey, or Hawaii. Kern terrain varies dramatically within the county, from the valley lowlands to the mountain peaks of the southern Sierra Nevada, to arid stretches of the Mojave Desert. Because of this geographic diversity, the county has a wide range of climates, determined largely by elevation and precipitation. Summer temperatures often reach over 100 degrees during the summer on the valley floor and in the Mojave Desert, and winter temperatures drop into the teens in the higher mountains. Kern is primarily a rural county with one Standard Metropolitan Area (SMA), which includes the cities of Bakersfield and Delano. Other incorporated cities include Wasco, Taft, Shafter, Maricopa, McFarland, Arvin, Ridgecrest, Tehachapi, and California City. The county has many other unincorporated communities with populations over 1,000 (statistically referred to as “Census Designated Places”) including Bear Valley Springs, Bodfish, Boron, Buttonwillow, Caliente, North Edwards, China Lake Acres, Edwards Air Force Base, Frazier Park, Ford City, Golden Hills, Greenacres, Greenfield, Kernville, Lake Isabella, Lamont, Lost Hills, Oildale, Pine Mountain Club, Stallion Springs, Taft Heights, Weedpatch, Weldon, and Wofford Heights.
Kern County Demographics
Population
In 2021, Kern County had an estimated population of 905,644, consisting of about 48 percent females and 51 percent males. The County has seen a steady growth—1% from 2019 to 2021 (Census, 2021). It is expected that the Kern population will breach one million people by 2028 and Bakersfield (Kern’s major metropolitan area) will meet the one million people milestone by 2042. In 2021, Tehachapi was the fastest-growing city in Kern County (Census, 2021).

<table>
<thead>
<tr>
<th>City</th>
<th>2019</th>
<th>2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arvin</td>
<td>21,249</td>
<td>20,674</td>
<td>-3%</td>
</tr>
<tr>
<td>Bakersfield</td>
<td>377,917</td>
<td>398,756</td>
<td>6%</td>
</tr>
<tr>
<td>California City</td>
<td>13,826</td>
<td>14,914</td>
<td>8%</td>
</tr>
<tr>
<td>Delano</td>
<td>52,866</td>
<td>55,487</td>
<td>5%</td>
</tr>
<tr>
<td>Maricopa</td>
<td>1,229</td>
<td>1,314</td>
<td>7%</td>
</tr>
<tr>
<td>McFarland</td>
<td>14,823</td>
<td>14,085</td>
<td>-5%</td>
</tr>
<tr>
<td>Ridgecrest</td>
<td>28,755</td>
<td>27,989</td>
<td>-3%</td>
</tr>
<tr>
<td>Shafter</td>
<td>19,477</td>
<td>22,642</td>
<td>16%</td>
</tr>
<tr>
<td>Taft</td>
<td>9,372</td>
<td>18,113</td>
<td>93%</td>
</tr>
<tr>
<td>Tehachapi</td>
<td>12,680</td>
<td>31,281</td>
<td>147%</td>
</tr>
<tr>
<td>Wasco</td>
<td>27,193</td>
<td>28,337</td>
<td>4%</td>
</tr>
<tr>
<td>Balance of County</td>
<td>320,815</td>
<td>272,052</td>
<td>-15%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>900,202</td>
<td>905,644</td>
<td>1% (Average)</td>
</tr>
</tbody>
</table>

Source: US Census, 2021
There are 262,988 children in Kern ages 0-18 (29%) and 125,790 (13.9%) of Kern residents are seniors, ages 60 and over. Together children and seniors are almost half of the Kern County total population (Census, 2021).

![Kern County Population by Age, 2021](source: US Census, 2021)

**Households and Families**

In 2021, there were 274,705 households in Kern County, California with an average household size of 3.19 people (Census, 2021). Married-couple households made up 50.4 percent of the households in Kern while cohabiting couple households made up 8.4 percent. There were close to 6.9 percent of single female households with their own children under 18 years of age compared to 1.9 percent of single male-headed family households. Of people living alone, 10.3 percent were male and 10.4 percent were female households, for a total of 20.7 percent of all households (Census, 2021).
In Kern County, California, 43.0 percent of all households have one or more people under the age of 18, while 25.8 percent of all households have one or more people 65 years and over (Census, 2021).

Multigenerational Households
Multigenerational households continued to be prevalent as a household type in Kern County with an estimated 25,49 grandparents living with their grandchildren, in 2021. Of those grandparents, 31 percent were responsible for the basic needs of their grandchildren.

Race and Ethnicity
Kern County's population is somewhat diverse with almost 54.7 percent of the population Hispanic/Latinx of any race. Close to 74.2 percent of Kern’s population is White and almost 6 percent are African American/Black.

Source: US Census, 2021
Foreign-Born

Of Kern County’s 2021 population, 79.4 percent were born in the United States, and 19.7 percent were foreign-born. Of the county’s foreign-born population, 78.4% came from Latin America.

Median Income

For 2021, the estimated median household income in Kern County was $58,824, up from the 2015 estimate of $49,026, and still less than the California median household income of $84,097. An estimated 5.9 percent of households had income below $10,000 a year and 5.8 percent had income over $200,000 or more.

Industry and Employment

The county’s economy is driven primarily by the petroleum and agriculture industries. Both are cyclical and affected by environmental and national and global economic factors. For example, recent decreases in oil prices have resulted in mass layoffs by oil producers and service companies and business closures and the recent statewide drought resulted in layoffs and reduced hours for agricultural workers and food processing operations as growers scale back on production because of the water shortage. The volatility of Oil and Agriculture can greatly impact Kern’s economy as it doesn’t just affect the people who are directly employed but also the thousands of trade and service industries connected to these industries and the County, which relies heavily on the tax revenue from the industry.

On the positive side, Kern County is becoming the renewable energy hub of California with over 5,000 wind turbines in the Tehachapi-Mojave wind corridor, capable of producing 1.3 million megawatts each year (Kern County, 2020). Wind energy is expanding with the completion of the Wind Hub Substation and transmission line that is being constructed by Southern California Edison.
Solar power is seeing tremendous growth in Kern with over 19 commercial solar projects in the permitting process and two utility-scale solar projects (200+ megawatts) in the approval process with the California Energy Commission.

Jobs in these industries tend to be higher paying than Kern’s average wages and have many opportunities for higher-paying STEM (Science, Technology, Engineering, and Math) related jobs.

**Kern County Poverty**

Poverty is defined as lacking the means (income) to meet basic needs. CAPK uses the federal guidelines for determining people who live at 100% of poverty, as follows (US Department of Health & Human Services, n.d.):

| 2023 Poverty Guidelines for the 48 Contiguous States and the District of Columbia |
|-------------------------------|------------------|
| 1                             | $14,580          |
| 2                             | $19,720          |
| 3                             | $24,860          |
| 4                             | $30,000          |
| 5                             | $35,140          |
| 6                             | $40,280          |
| 7                             | $45,420          |
| 8                             | $50,560          |

For families/households with more than 8 persons, add $5,140 for each additional person.
Approximately 18 percent of Kern County residents live in poverty—*the fifth-highest poverty rate for all California Counties*—and almost double the rate for the whole state.

**Kern County Poverty, 2021**

<table>
<thead>
<tr>
<th>City</th>
<th>Poverty Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>McFarland</td>
<td>29.3%</td>
</tr>
<tr>
<td>Arvin</td>
<td>27.9%</td>
</tr>
<tr>
<td>Taft</td>
<td>29.2%</td>
</tr>
<tr>
<td>Maricopa</td>
<td>19.2%</td>
</tr>
<tr>
<td>California City</td>
<td>25.4%</td>
</tr>
<tr>
<td>Shafter</td>
<td>22.2%</td>
</tr>
<tr>
<td>Delano</td>
<td>18.7%</td>
</tr>
<tr>
<td>Wasco</td>
<td>19.2%</td>
</tr>
<tr>
<td>Kern County</td>
<td>18.0%</td>
</tr>
<tr>
<td>Bakersfield</td>
<td>16.1%</td>
</tr>
<tr>
<td>Tehachapi</td>
<td>11.1%</td>
</tr>
<tr>
<td>Ridgecrest</td>
<td>11.4%</td>
</tr>
<tr>
<td>California</td>
<td>12.3%</td>
</tr>
</tbody>
</table>

**Source:** US Census, 2021

When looking at Kern poverty by cities, 8 of 11 (73%) have higher rates than the county with the more rural agriculture areas of Taft and McFarland having the most people living in poverty. There are many areas of concentrated poverty in Kern County with rates as high, well over 40%.
Family Poverty

Single female-headed households have the highest rates of poverty in Kern, over double that of all families. Households led by people ages 65 and lower have the lowest rates.

Source: US Census, 2021

Child Poverty

Research shows that the longer children live in poverty the greater the likelihood that they will remain in poverty as adults. According to research conducted by Columbia University’s National Center for Children in Poverty, 45% of those who spent at least half of their childhood in poverty were still living in poverty at age 35. This has significant implications when considering the poverty rates for Kern County children.

Source: US Census, 2021
Poverty and Race/Ethnicity

As seen in the chart below, people who are Asian or White have the lowest poverty in Kern County while Black/African American and Native Hawaiian/Pacific Islanders have the highest rates.

![Poverty by Race & Ethnicity, 2021](chart)

Source: US Census, 2021

Working Poor

The “working poor” can be defined as people in the labor force who fall below the federal poverty level and spend 27 weeks or more in a year working or looking for work. The face of poverty in the United States has changed greatly over the last decade. In a report presented at the National Community Action Partnership Mega Trends Learning Cluster, *Inequality in America*, former Secretary of Labor Robert Reich discusses trends of those living in poverty in the U.S. According to Reich, as the median family income continues to drop, an estimated 65% of U.S. families live paycheck to paycheck. He goes on to say that a significant number of people in poverty are working but are unable to earn enough to lift themselves out of poverty. Reich also claims that about 55% of all Americans aged 25 to 60 have experienced at least one year of poverty or near poverty (150% of poverty), and at least half of all U.S. children have relied on food stamps at least once in their lifetime.
The University of California, Davis reports that 51.8% of people living in poverty ages 18 to 64 years that are not disabled or in school, worked for part of the year and 25.2 percent worked more than 50 weeks. According to the Economic Policy Institute, the majority of people who live in poverty are eligible to work—not disabled, a student, or retired—are working. This is also supported by the California Budget and Policy Center, *Five Facts Everyone Should Know About Poverty*, which states that the majority of families that live in poverty are working and 67% of those families have one or more workers supporting them. The key reasons cited for working families remaining in poverty are a lack of good-paying jobs and the low minimum wage. In Kern County, almost 9.8% of employed residents who are 16 years of age or over are living in poverty.

Causes of Poverty

Causes of poverty are the negative factors that create or foster barriers to self-sufficiency and/or reduce access to resources in communities in which low-income individuals live.

Unemployment

Kern County unemployment rates typically run in the double digits and about 2 to 3 times higher than the State and Nation. However, Kern saw historic lows in unemployment in 2018 and 2019. However, these gains disappeared during the pandemic when over 12% of Kern’s working population became unemployed. Currently, for 2022-23, Kern County’s unemployment rate has been between 6-8%, which is consistently higher than California’s unemployment rate. (Employment Development Department, 2023)

As stated previously, a major driver of Kern's employment is the oil and agricultural industries. These industries allow many under-skilled and under-educated workers to earn a good wage and support their families. However, they are the most vulnerable when there are downturns in these industries causing long-term unemployment.
Source: California Department of Labor, 2023

Educational Attainment

When comparing the highest level of education achieved for Kern residents ages 25 and over to those of all Californians, Kern County falls far behind. More Kern residents never go beyond high school when compared to the State of California and far less achieve bachelor’s degrees or higher.
The effects of this lack of higher education can be seen when comparing poverty to education levels. As seen below, clearly as education increases, poverty decreases. And as discussed above, with the growing alternative energy industries in the county, higher education can ensure long-term employment and much higher wages.

![Chart: Kern County Educational Attainment and Poverty, 2021](chart.png)

Source: US Census, 2021

**Homelessness**

The Homeless Point-in-Time Count is an annual census conducted in a 24-hour period in counties throughout the United States. In the 2022 Point-in-Time conducted by the Bakersfield Kern Regional Homeless Collaborative (BKRHC), there were 1,603 unduplicated people that were homeless countywide—sheltered and unsheltered. Other key points of this census were:

- 1,603 unduplicated homeless people countywide were sleeping in shelters and
Compared to 2020, Kern County increased its total sheltered count by 52 percent.

- 9.5% rise in the numbers of individuals and families with children sleeping in emergency shelters or transitional housing program compared to 2020.

- 97% increase since January 2017 (from 810 to 1,603 people), with a 273% increase in unsheltered people.
84% of Kern County’s sheltered and unsheltered homeless populations were in Metro Bakersfield and 16% in rural cities and communities outside of Bakersfield. This represents a 2% increase in homelessness in rural areas of Kern County.

The City of Bakersfield and Kern County have made some great strides to increase the number of emergency beds. In 2020, the M Street Homeless Navigation Center and the Brundage Homeless Navigation Center opened with a combined 300 bed capacity. These shelters are both “low barrier” allowing men, women, partners, and pets. Other shelters are the Bakersfield Rescue Mission—which, in 2021, added 40 beds to the men’s shelter and opened a 32-bed women and children shelter—and the Bakersfield Homeless Shelter, which provides emergency shelter to 170 men, women, and families. All of which are in the city of Bakersfield. Except for emergency housing specifically for victims of domestic violence and their children, there are no emergency shelters in the rural areas of Kern County.

With the events of COVID, all shelters had to reduce the number of people who are homeless for health and public safety concerns. This may account for some of the drastic increase in those who are unsheltered during the pandemic.

Food Insecurity

As of 2021, Kern County, California had a food insecurity rate of 16.1%, which means that approximately 1 in 6 residents may not have consistent access to enough food for an active, healthy life. This figure represents a decrease from the previous year’s rate of 18.7% but is still higher than the national average of 10.5%. Food insecurity is often linked to poverty and unemployment, and can have serious health consequences, particularly for children and seniors.
Throughout the nation, an emerging issue is food insecurity in older adults. According to the USDA’s latest report on food insecurity in the US (2021), 3.8% of households with seniors (age 65 or older) were food insecure with hunger, which means that at least one household member experienced a reduction in their food intake due to lack of resources. Additionally, 7.6% of households with seniors were food insecure without hunger, which means that they were able to provide enough food, but it was of lower quality or variety than what is considered healthy. In 2019, Feeding America reported that 5.3 million seniors (age 60 or older) experienced food insecurity in the US, which represents 7.3% of the senior population. The COVID-19 pandemic has also had a significant impact on food insecurity among older adults. According to a survey conducted by the National Council on Aging (NCOA) in 2020, 27% of older adults experienced food insecurity during the pandemic.

Kern County is a key supplier of food for the nation through its abundant agricultural production. In 2017, Kern County edged out Tulare County to become the top agricultural county in the nation for the first time, bringing in $7.2 billion in crop revenue.
However, despite this great abundance of produce, Kern County has a significant problem with food deserts. The FDA’s Food Access Research Atlas defines a food desert as a low-income census tract where a substantial number or share of residents has low access to a supermarket or large grocery store where there is fresh produce and access to healthy food. According to the latest data available on the FDA’s Food Access Research Atlas, which is from 2019, Kern County, California had a total of 38 census tracts, of which 21 were classified as food deserts. This means that about 55% of the census tracts in Kern County meet the criteria for a food desert.

Health

Overall, the health of Kern County residents falls far behind residents of other California counties in health outcomes and factors. According to the County Health Rankings and Roadmaps for 2023 (University of Wisconsin, n.d.), Kern County ranked 49 out of 58 California counties in ‘Health Outcomes’ and 54 out of 58 in ‘Health Factors’—the fifth-worst in the State. Health factors that affect people living in Kern County include many of the socio-economic factors previously discussed, such as educational attainment, unemployment, and income inequality. Additionally, Kern is the worst county in the State for health behaviors such as adult smoking, obesity, access to exercise opportunities, sexually transmitted diseases, and teen births.

<table>
<thead>
<tr>
<th>Health Outcomes</th>
<th>2019</th>
<th>2021</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of Life</td>
<td>46</td>
<td>50</td>
<td>49</td>
</tr>
<tr>
<td>Quality of Life</td>
<td>55</td>
<td>43</td>
<td>54</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Health Factors</th>
<th>2019</th>
<th>2021</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Behaviors</td>
<td>58</td>
<td>51</td>
<td>51</td>
</tr>
<tr>
<td>Clinical Care</td>
<td>52</td>
<td>42</td>
<td>52</td>
</tr>
<tr>
<td>Social &amp; Economic Factors</td>
<td>53</td>
<td>49</td>
<td>56</td>
</tr>
<tr>
<td>Physical Environment</td>
<td>57</td>
<td>43</td>
<td>53</td>
</tr>
</tbody>
</table>
Disconnected Youth
Disconnected youths can be defined as people ages 16 – 24 who are neither working nor in school. According to the Forum for Youth Investment’s Opportunity Index (2020), 12.3 percent of Kern County youth are disconnected from the social institutions that provide them with the knowledge, skills, identity, and purpose needed to lead productive lives as adults. Overall, Kern County ranked 22nd out of the 58 counties in California. The long-term consequences of this condition are staggering—decrease in a skilled labor force; increase in public assistance; increase in crime and incarceration; poor physical and mental health; and increase in substance abuse.

A real concern over this past year is the social isolation experienced by young people, especially from the lack of connection through school, caused by the pandemic. This disconnection can have real consequences for our youths with a lower connection to school corresponding to increased gang activity.
Conditions of Poverty

Conditions of poverty are the negative environmental, safety, health and/or economic conditions that may reduce investment or growth in communities where low-income individuals live.

Housing

As of 2021, there were a total of 299,810 housing units in Kern County. Of these housing units, 274,705 were occupied, and 25,105 were vacant. Of the occupied housing units, slightly more were owner-occupied than renter-occupied (Census, 2021). This is important to note because homeownership provides stability and provides a path to financial security.

Most Kern residents pay too much of their income for housing (rent/mortgage). The maximum threshold of income that should be paid for rent is approximately 25 percent. Using more than 25 percent of the household income for rent leaves people cost-burdened and they may have difficulty affording necessities such as food, clothing, transportation, and medical care (U.S. Department of Housing and Urban Development, n.d.)
In Kern County, most renters use well over 30 percent of their income for rent (Census, 2021).

![Kern County Gross Rent as Percentage of Household Income](image)

Source: US Census, 2021

There is a shortage of affordable housing in Kern County. According to the Kern County 2022 Affordable Housing Needs Report, by the California Housing Partnership (2022):

- **25,550** low-income renter households in Kern County do not have access to an affordable home.
- **80% decrease** in tax credits for low-income housing production and preservation in Kern County while state production and preservation decreased 13%.
- **75%** of extremely low-income households are paying more than half of their income on housing costs compared to just 6% of moderate-income households.
- Additionally, the report states that renters in Kern County need to earn $22.27 per hour—1.5 times the state’s minimum wage—to afford the average monthly Kern rent of $1,158.

**Affordable Childcare**

According to a report by the California Budget & Policy Center, in 2021, 63% of children under age 6 in Kern County had all parents in the workforce, indicating a high need for affordable childcare options. The same report found that in 2021, the cost of infant care in
Kern County was 19.5% of the median income for a family with children, making it unaffordable for many families. However, there have been local efforts to combat the problem. In May 2021, the Kern County Board of Supervisors approved the allocation of $3.5 million in federal funding to support childcare providers and families in need of childcare during the COVID-19 pandemic. The same month, the Kern County Superintendent of Schools announced a new partnership with the California State University, Bakersfield to launch a new program to train and support childcare providers in the county. According to a 2021 report by the National Women’s Law Center, in Kern County, a single parent with one child would need to earn at least $30.37 per hour to afford basic needs, including childcare, housing, and food, highlighting the ongoing challenges facing low-income families in the county.
Additionally, the 2021 *Child Care Portfolio by the California Child Care Resource & Referral Network*, provided insight into the nature of childcare requests countywide; it shows that while 31% of requests for provider referrals were from parents seeking infant/toddler care, only 1% of licensed center slots in Kern County were specifically for children under the age of 2 years. Nonetheless, according to a report by the Center for American Progress, in 2021, the average cost of that 1% of center-based infant care in Kern County was $1,183 per month, or $14,196 per year.

**Environmental Health (Air and Water Quality)**

According to the American Lung Association 2022 *State of the Air Report*, had the worst air quality in the United States for year-round particle pollution, as it has had for many years. Kern County also received failing grades for both short-term particle pollution and ozone pollution.

- **Short-term particulate**: Episodes of increased particulates caused by events such as wildfires.
- **Year-round particulate**: Chronic exposure to particulates caused by things like soot, diesel exhaust, chemicals, metals, and aerosols.
- **Ozone**: Mostly attributed to wood-burning and auto exhaust.

Kern County ranked as the worst county in the nation with the highest year-round particle pollution. These particulates are of special concern for Kern County residents because of the significant health risks. As noted in this report, Kern has a high poverty rate, especially in our rural farming communities, which is linked to lower access to health care. Another factor to consider is that Kern’s main industries (agriculture and oil) are major
contributors to the poor air quality. Asthma rates for Kern County are ranked among the highest in the state as indicated by asthma hospitalizations. Children are more vulnerable to the effects on health from poor air quality due to more permeable skin and fragile systems. In addition to the health effects of the poor air quality in Kern already discussed, children are also at risk of increased cognitive defects and cancer.

Access to Health Services and Insurance

According to the County Health Rankings & Roadmaps program, in 2022, 10% of adults in Kern County were uninsured, which is higher than the statewide average of 8%. Furthermore, according to the California Department of Health Care Services, 40% of Kern County Residents had Medi-Cal coverage, and 13% had Medicare coverage.

The Effects of COVID-19

As of April 2023, the COVID-19 pandemic in Kern County, California is showing signs of improvement. The vaccination rates have increased significantly, with 73% of the county’s population fully vaccinated as of the end of March 2023. The daily infection rate has decreased to less than 1 case per 100,000 people, and the hospitalization rate has dropped significantly, with fewer than 20 COVID-19 patients hospitalized in the county.

However, the pandemic has had a lasting impact on the economy and the education system in Kern County. The unemployment rate in the county remains higher than pre-pandemic levels, at 8% as of March 2023. Many small businesses in the region are still struggling to recover from the economic downturn, with some closing permanently due to the financial impact of the pandemic.

Underserved communities in Kern County have been disproportionately affected by the pandemic. For example, Hispanic/Latino residents account for 64% of COVID-19 cases in the county despite making up only 52% of the population. In response to these disparities, local organizations and schools have implemented various programs to support these communities. For instance, the Kern County Latino COVID-19 Task Force has organized free vaccine clinics, testing, and education campaigns to address vaccine hesitancy and increase access to COVID-19 resources among Hispanic/Latino residents.

The COVID-19 pandemic has had significant impacts on the education and youth of Kern County, California. School closures and disruptions have caused significant learning loss
for many students, particularly those in underserved communities. According to data from the California Department of Education, Kern County students have experienced significant declines in academic performance during the pandemic. For example, in the 2020-2021 school year, only 31% of Kern County students met or exceeded standards in English language arts, compared to 50% in the previous year. Similarly, only 19% of students met or exceeded standards in math, compared to 38% the previous year.

The pandemic has also had significant impacts on the mental health and well-being of Kern County youth. According to a survey conducted by the Kern County Superintendent of Schools Office, 53% of students reported experiencing anxiety or depression during the pandemic. Additionally, the pandemic has increased social isolation and exacerbated existing disparities in mental health access and outcomes, particularly for students in underserved communities.
An indicator of local needs is the CAPK 2-1-1 Call Report. CAPK 2-1-1 is Kern County’s 24-hour 365 days-a-year resources and referral call center. During the height of the pandemic, the CAPK2-1-1 Referral and Helpline had an overall call volume increase of 29 percent, in 2020. Forward to 2022, and we now see an 80 percent decrease in call volume. Furthermore, when comparing the top referrals from 2020 to 2022, one can see the continued economic ramifications of the pandemic. That is, there remains a population of Kern County residents that are still in need of emergency assistance.

<table>
<thead>
<tr>
<th>Top Three Referrals, 2019</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Assistance</td>
<td>33,765</td>
</tr>
<tr>
<td>Homeless Diversion Programs</td>
<td>8,269</td>
</tr>
<tr>
<td>Utility Service Payment Assistance</td>
<td>5,903</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>47,937</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Top Three Referrals, 2020</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Assistance</td>
<td>81,328</td>
</tr>
<tr>
<td>Rent Payment Assistance * COVID-19</td>
<td>10,005</td>
</tr>
<tr>
<td>Utility Service Payment Assistance</td>
<td>34,068</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>125,401</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Top Three Referrals, 2022</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeless Diversion Programs</td>
<td>10,826</td>
</tr>
<tr>
<td>Food Stamps/SNAP</td>
<td>7,038</td>
</tr>
<tr>
<td>Utility Service Payment Assistance</td>
<td>6,552</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>24,416</strong></td>
</tr>
</tbody>
</table>
In addition to the 2-1-1 report, CAPK gathered data from an Internal Referral Management System (IRM) for the year of 2022. The chart below shows which internal CAPK program received the most internal referrals from July 2022-December 2022.

As shown, the internal CAPK program that received the most referrals is the Coordinated Entry Systems (CES). CES provides a single point of access for shelter, job resources, mental health, substance abuse and other services for individuals experiencing homelessness in Kern County. This internal data reflects the top referral from 2-1-1, the need for homeless diversion programs.
CAPK 2023 Community Needs Assessment

Overview
As a Community Services Block Grant (CSBG) eligible entity, Community Action Partnership of Kern (CAPK) completes a bi-annual Community Needs Assessment (CNA). The CNA identifies and assesses poverty-related needs and resources in the community to identify priority areas of focus. The assessment includes CAPK conducted surveys, secondary data (US Census and other reports), and client feedback. CAPK is in the process of gathering and analyzing data for the CNA to be completed by May 2023. The following information is based on the results of the CAPK 2023 Community Needs Surveys.

Method
The CAPK 2023 Community Needs Survey was conducted from September 17, 2022 to March 31, 2023. Three different surveys were distributed to measure what is most needed in Kern County to assist low-income people and families—CAPK clients (in English and Spanish); CAPK partners and other community agencies; and CAPK board members. The service-related questions were identical on all three surveys. The only differences between the three were in the optional identification area consisting of demographics in the Client Survey; organization information in the Partner/Community Agency Survey; and CAPK affiliation information in the CAPK Board Survey.

Links to the survey were shared through email blasts, social media, and printed postcards that were distributed directly to clients. A mailing was also conducted of the postcards. Paper surveys were handed out and collected at CAPK program sites. Additionally, CAPK staff attended food distribution sites and community resource events to conduct and collect surveys from community members. The average scores from the three surveys (client, partner, and Board) were used to determine the top five needs.
A total of 1,108 surveys were collected as follows:

<table>
<thead>
<tr>
<th>Survey</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAPK Clients</td>
<td>920</td>
</tr>
<tr>
<td>Partners/Community Agencies</td>
<td>175</td>
</tr>
<tr>
<td>CAPK Board Members</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total Responses</strong></td>
<td><strong>1,108</strong></td>
</tr>
</tbody>
</table>

Of the client survey, 780 (84%) were completed in English and 140 (15%) were collected in Spanish. The race/ethnicity of those completing the survey (presented below) indicate the lack of Spanish language surveys does not necessarily mean that there was a lack of Hispanic survey respondents. Additionally, in previous years, Spanish language surveys were mostly completed by paper.

**Client Survey Demographics**
The majority of clients surveyed were people of color (73%) followed by White (27%). This closely mirrors CAPK’s total client race/ethnicity, indicating a strong sample of the CAPK client population.

There were significantly more female client respondents (81%) to the survey and less than 2 percent identified as Transgender or Other.
Age ranges for client responses varied with over half between the ages of 25 and 44 years and 8 percent ages 65 and over.

Almost half of the client respondents (59%) live in household sizes above the Kern Median household size of 3.3 people.
Results
The survey had a list of 26 services. Respondents were asked, "Please note your level of need for each topic below?" Each topic was ranked by Most Needed, Somewhat Needed, Not Needed, or Don’t Know. The Score range is 1.0-3.0 with higher scores indicating the most need. The following table shows the top needed services identified by each of the three groups with the average total for all.

<table>
<thead>
<tr>
<th>Needs</th>
<th>All Surveys</th>
<th>Clients</th>
<th>Partners</th>
<th>Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable Housing</td>
<td>2.24</td>
<td>2.32</td>
<td>2.71</td>
<td>1.69</td>
</tr>
<tr>
<td>Mental Health Treatment</td>
<td>2.16</td>
<td>1.9</td>
<td>2.69</td>
<td>1.9</td>
</tr>
<tr>
<td>Nutritious Food</td>
<td>2.07</td>
<td>2.13</td>
<td>2.49</td>
<td>1.6</td>
</tr>
<tr>
<td>After-School Programs</td>
<td>2.06</td>
<td>2.1</td>
<td>2.5</td>
<td>1.6</td>
</tr>
<tr>
<td>Homeless Services</td>
<td>2.04</td>
<td>1.8</td>
<td>2.63</td>
<td>1.7</td>
</tr>
<tr>
<td>Job Skills Training</td>
<td>2.02</td>
<td>1.9</td>
<td>2.66</td>
<td>1.5</td>
</tr>
<tr>
<td>Affordable Childcare</td>
<td>1.9</td>
<td>1.9</td>
<td>2.69</td>
<td>1.38</td>
</tr>
</tbody>
</table>

When looking at the top five needs identified, the table shows where each group was similar, and each was different. For example, partners and staff members both thought that mental health needs are a significant need in our community. Additionally, clients and partners believe affordable housing and childcare is a service needed to assist low-income families and individuals.
The survey also asked respondents “What services are most needed to help people due to the COVID-19 pandemic?” Results, using the same scale and scoring as above, are in the table below. In some groups, there are more than five service needs identified due to tied scores.

<table>
<thead>
<tr>
<th>Service Needs</th>
<th>All</th>
<th>Clients</th>
<th>Partners</th>
<th>Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>2.27</td>
<td>2.24</td>
<td>2.58</td>
<td>2</td>
</tr>
<tr>
<td>Internet Access for at Home work/School</td>
<td>2.24</td>
<td>1.7</td>
<td>2.54</td>
<td>2.5</td>
</tr>
<tr>
<td>Rent/Mortgage Assistance</td>
<td>2.22</td>
<td>2.18</td>
<td>2.5</td>
<td>2.0</td>
</tr>
<tr>
<td>No Cost Health Care</td>
<td>2.13</td>
<td>2.01</td>
<td>2.4</td>
<td>1.99</td>
</tr>
<tr>
<td>Utility Assistance</td>
<td>2.12</td>
<td>1.77</td>
<td>2.6</td>
<td>2.0</td>
</tr>
<tr>
<td>Employment Assistance</td>
<td>2.12</td>
<td>2.15</td>
<td>2.29</td>
<td>1.92</td>
</tr>
<tr>
<td>Homeless Services</td>
<td>2.09</td>
<td>1.9</td>
<td>2.49</td>
<td>1.9</td>
</tr>
<tr>
<td>Child Care</td>
<td>2.00</td>
<td>1.9</td>
<td>2.42</td>
<td>1.69</td>
</tr>
</tbody>
</table>

**In-Person Focus Groups**

The 2023 Community Needs Assessment conducted two in-person focus groups in California City and Shafter.

**California City**

Date: April 11, 2023  
Time: 12 pm to 1:30 pm  
Location: Arts & Community Center - 10400 Heather Ave California City, CA 93505

**Shafter**

Date: April 13, 2023  
Time: 12 pm to 1:30 pm  
Location: Shafter Youth Center – 455 E. Euclid Ave Shafter, CA 93263

These cities were selected because they are among the top three outlying cities in East and West Kern, respectively, where CAPK clients reside. The in-person focus groups were meant to gauge the survey findings as they relate to the needs in those
communities, identify common concerns, and gain a deeper understanding of survey results.

A PowerPoint presentation was presented to gather community feedback. Community members had an opportunity to review survey findings and provide feedback on how they rate these needs at the local level. CAPK staff found that most residents in California City and Shafter agreed with our survey findings but disagreed on their rating of needs (most to least important). Meetings included breakout sessions with a small workgroups of two to four community members.

In California City, a total of 10 work groups were established. Staff found the following need-based themes from our focus group in California City:

1. Utility Assistance
2. After-school programs for youth
3. Transportation
4. Affordable Housing
5. Affordable Childcare

Utility Assistance was the number 1 response. Five of the 10 workgroups cited utility assistance as a concern. Topics numbered 2 through 5 were equally mentioned by a total of four workgroups during the discussion.

In Shafter, a total of 7 work groups were established with two to three members each. Staff found the following need-based themes from our focus group in Shafter:

1. After-school programs for youth
2. Medical services/access to specialty care
3. Job skills and job training
4. Senior Services

After-school programs for youth was the number 1 response. Four of the 7 workgroups cited after-school services as a need in the community. Topics numbered 2 through 4 were equally mentioned by three workgroups.
<table>
<thead>
<tr>
<th>1. Nutritious Food</th>
<th>91%</th>
<th>Need to increase access; healthy foods are too expensive.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Affordable Housing</td>
<td>73%</td>
<td>Need to expand income limits to include those who fall through the cracks. Need to increase availability (inventory).</td>
</tr>
<tr>
<td>3. Homeless Services</td>
<td>36%</td>
<td>Need to understand the subgroups so programs can better assist them. Assistance needs to move faster. Mental health and substance abuse should be part of homeless services.</td>
</tr>
<tr>
<td>4. After-School/Summer Recreation</td>
<td>73%</td>
<td>Support all children’s healthy growth and development. After School/summer programs supports working parents by having a no-cost option.</td>
</tr>
<tr>
<td>5. Job Skills Training</td>
<td>91%</td>
<td>Job skills lead to better paying jobs and financial security: need more programs/services.</td>
</tr>
</tbody>
</table>

Affordable Childcare continued to be an issue with most people stating the after-school programs are needed to provide free care for working families.

Comparison
In the last CAPK Community needs Survey (2021) the top three needs in order were: nutritional food, affordable housing, and homeless services. The 2023 survey results show that the top three needs are affordable housing, assistance with utility bills, and afterschool activities for youth. In comparison to the 2021 top three needs results: nutritious food, affordable housing, and homeless services, two needs have remained a need for the community: affordable housing and homeless services. This comparison reflects Kern County’s 1.5% increase of unduplicated homeless individuals since 2020 and 75% of extremely low-income households paying more than half of their income on housing costs.

<table>
<thead>
<tr>
<th>Agency Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Affordable Childcare</td>
</tr>
<tr>
<td>2. Job Skills Training</td>
</tr>
<tr>
<td>3. After School/Summer Recreation</td>
</tr>
<tr>
<td>4. Affordable/Quality Housing</td>
</tr>
<tr>
<td>5. Homelessness</td>
</tr>
<tr>
<td>6. Youth Programs</td>
</tr>
<tr>
<td>7. Seniors</td>
</tr>
</tbody>
</table>
Conclusion
Kern is a county that continues to struggle with deep poverty and disparities. However, each challenge can be seen as an opportunity for change. The County’s rich agriculture, abundant natural resources, and innovative industries can provide great opportunities for low-income families to improve their circumstances. It is clear by the research, surveys, and interviews, that low-income people want the ability to earn better wages, safe and affordable housing, and the resources to support their climb out of poverty. It is incumbent upon the community to meet these challenges with innovative programs that assist families with building stability. This not only helps those we serve, but also serves the entire community by assuring Kern has a diverse and skilled workforce to meet the challenges ahead. As a Community Action Agency, staff members have taken the initiative to be certified in a Results-Oriented Management and Accountability (ROMA) and serve as an implementor for our agency. ROMA provides a framework for continuous agency growth and provides accountability to how Community Action Agencies report results. Through the ROMA course, staff members identified the need for and the importance of collecting customer satisfaction data. CAPK staff are currently developing a customer satisfaction survey to be implemented and available through our website. The expected date of completion is May 2023.
Works Cited


California Budget & Policy Center. April 2021. "California’s Child Care Affordability Crisis: A Call for a Statewide Solution, ".


KGET News, (May 2021) "Kern County approves $3.5 million in COVID-19 relief funds for childcare,"

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Kern County Superintendent of Schools Office. (2020). Kern Learns: A Safe Return to School in Kern


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### 2022 Community Needs Survey-Client

1. Please note your level of need for each topic below.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Most Needed</th>
<th>Somewhat Needed</th>
<th>Not Needed</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>More education for myself</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More education for my child</td>
<td></td>
<td></td>
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<tr>
<td>Skills for a job</td>
<td></td>
<td></td>
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<tr>
<td>Knowledge about finances</td>
<td></td>
<td></td>
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<tr>
<td>Better health or eating habits</td>
<td></td>
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<td></td>
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<tr>
<td>Academic skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Affordable childcare</td>
<td></td>
<td></td>
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<tr>
<td>Activities for after school or the summer</td>
<td></td>
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<tr>
<td>Employment for youth</td>
<td></td>
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</tr>
<tr>
<td>Leadership skills for youth</td>
<td></td>
<td></td>
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<tr>
<td>Programs for seniors</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Health Insurance</td>
<td></td>
<td></td>
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<tr>
<td>Knowledge to prevent teen pregnancies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mental health needs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Substance abuse assistance</td>
<td></td>
<td></td>
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<tr>
<td>Immigration or Citizenship requirements</td>
<td></td>
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<tr>
<td>Transportation</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Services/programs in Rural Areas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Education (credit assistance, knowledge about household budget management or starting a business)</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Affordable Housing</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Homelessness</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>High or overdue utility bills</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Domestic violence</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
<tr>
<td>Local gang or violence</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
<td>〇</td>
</tr>
</tbody>
</table>

Other (please specify) 

2. In the last 12 months, did you worry food would run out before you had money to buy more?

- ☐ Monthly or more often
- ☐ At least twice
- ☐ Never

3. In the last 12 months, were you unable to eat healthy food because you could not afford it?

- 〇 Monthly or more often
- 〇 At least twice
- 〇 Never
4. In the last 12 months, did you ever eat less than you felt you should because there was not enough money for food?

- Monthly or more often
- At least twice
- Never
5. What services are most needed to help people due to the COVID-19 pandemic?

<table>
<thead>
<tr>
<th>Service</th>
<th>Most Needed</th>
<th>Somewhat Needed</th>
<th>Not Needed</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact delivery food and necessities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rent/Mortgage Assistance</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Utility Assistance</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Emergency cash aid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No cost health care</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tutoring/ education assistance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Homeless Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet Access for at home work/school</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Care</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Home Child Care</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Assistance</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>COVID Education/Information</td>
<td></td>
<td></td>
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<tr>
<td>COVID Testing Location</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>COVID Vaccination Scheduling Assistance</td>
<td></td>
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<tr>
<td>COVID Vaccination Transportation Assistance</td>
<td></td>
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<tr>
<td>COVID Personal Protective Equipment</td>
<td></td>
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</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
6. Which CAPK program/s have you had contact with in the last 12 months?

- 2-1-1 Kern
- Home Visiting Program
- CalFresh Health & Nutrition Education
- Housing Service
- Energy Program (Utility Assistance and Weatherization)
- East Kern Family Resource Center
- Food Bank
- Friendship House Community Center
- Head Start / Early Head Start
- Homeless Services (M Street Homeless Shelter and/or Coordinated Entry Systems)
- Rental Assistance
- Migrant Childcare Alternative payment
- Oasis Family Resource Center
- Shafter Youth Center
- Volunteer Income Tax Assistance
- Women's Infant and Children Nutrition Assistance
- None/ Don’t Know

7. Do you think COVID-19 vaccines are safe?

- Yes
- No

8. Are you vaccinated against COVID-19?

- Yes
- No
9. If you are not vaccinated, do you intend to get the COVID-19 vaccination?

☐ Yes
☐ No

10. Do you intend to get a COVID-19 booster?

☐ Yes
☐ No

11. Are you concerned that you, a family member, or friend will contract COVID-19?

☐ Yes
☐ No

12. Do you feel that Kern County is still in the middle of a pandemic?

☐ Yes
☐ No

13. What is your gender?

☐ Male
☐ Female
☐ Transgender
☐ Other

14. What is your military status?

☐ Veteran
☐ Not a Veteran
15. What is your age?


17. What is the highest level of education that you have completed?
   - Less than High School
   - High School
   - Some College (No Degree)
   - 2 Year College Graduate
   - 4 Year College Graduate
   - Post Graduate Degree

18. How many people live in your household?

19. Annual Household Income
20. Race/Ethnicity

☐ American Indian/Alaskan Native

☐ Asian

☐ Black/African American

☐ Hispanic

☐ Native Hawaiian/Pacific Islander

☐ White/Caucasian

☐ Multi Race

☐ Other
1. Note su nivel de necesidad para cada tema a continuación.

<table>
<thead>
<tr>
<th>Tema</th>
<th>Más necesario</th>
<th>Se necesita poco</th>
<th>Innesesario</th>
<th>No sé</th>
</tr>
</thead>
<tbody>
<tr>
<td>Más educación para mi</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Más educación para mi hija/o</td>
<td></td>
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</tr>
<tr>
<td>Habilidades para un trabajo</td>
<td></td>
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</tr>
<tr>
<td>Conocimientos sobre finanzas.</td>
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<td></td>
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</tr>
<tr>
<td>Mejor salud o hábitos alimenticios</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Habilidades academicas</td>
<td></td>
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</tr>
<tr>
<td>Cuidado de niños asequible</td>
<td></td>
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<tr>
<td>Actividades para después de la escuela o en el verano</td>
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<tr>
<td>Empleo juvenil</td>
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<tr>
<td>Liderazgo juvenil</td>
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<tr>
<td>Programas para ancianos</td>
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<tr>
<td>Seguro de salud</td>
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<tr>
<td>Conocimientos para prevenir embarazos adolescentes</td>
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<tr>
<td>Tratamiento de salud mental</td>
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<tr>
<td>Tratamiento de abuso de sustancias</td>
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<tr>
<td>Inmigración / Ciudadanía</td>
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<tr>
<td>Transporte</td>
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<tr>
<td>Servicios y programas en zonas rurales</td>
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<tr>
<td>Educación financiera (asistencia crediticia, conocimiento sobre el manejo del presupuesto familiar o cómo iniciar un</td>
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</tr>
<tr>
<td>Vivienda asequible</td>
<td></td>
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<tr>
<td>Servicios para desamparados</td>
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<tr>
<td>Facturas de servicios públicos altas o vencidas</td>
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<tr>
<td>Violencia doméstica</td>
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</tr>
<tr>
<td>Pandillas / violencia local</td>
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<tr>
<td>Other (please specify)</td>
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</tr>
</tbody>
</table>

2. En los últimos 12 meses, ¿le preocupó que se acabara la comida antes de tener dinero para comprar más?

- [ ] Mensual o más a menudo
- [ ] Por lo menos dos veces
- [ ] Nunca

3. En los últimos 12 meses, ¿no pudo comer alimentos saludables porque no podía pagarlos?

- [ ] Mensual o más a menudo
- [ ] Por lo menos dos veces
- [ ] Nunca

4. En los últimos 12 meses, ¿alguna vez comió menos de lo que creía que debía porque no había suficiente dinero para comprar alimentos?

- [ ] Mensual o más a menudo
- [ ] Por lo menos dos veces
- [ ] Nunca
5. ¿Qué servicios son más necesarios para ayudar a las personas debido a la pandemia de COVID-19?

<table>
<thead>
<tr>
<th>Servicio</th>
<th>Más necesario</th>
<th>Se necesita poco</th>
<th>Innesecario</th>
<th>No sé</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alimentos</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Servicios de comunicación para la entrega de alimentos y necesidades</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asistencia con el pago de renta o de hipoteca</td>
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<tr>
<td>Asistencia con el pago de servicios públicos</td>
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<tr>
<td>Ayuda monetaria de emergencia</td>
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<tr>
<td>Atención médica gratuita</td>
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<tr>
<td>Asistencia con de tutoría y educación</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Servicios para personas desamparadas</td>
<td></td>
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<td></td>
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<tr>
<td>Acceso a internet para el trabajo en casa o la escuela</td>
<td></td>
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<td></td>
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<tr>
<td>Cuidado infantil</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Cuidado infantil en casa</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asistencia laboral</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Ubicaciones e información sobre los centros de vacunación de COVID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encontrar ubicaciones para prueba de COVID-19</td>
<td></td>
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<tr>
<td>Asistencia para conseguir una cita para la vacunación contra el COVID-19</td>
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<tr>
<td>Transporte de cita de vacunación COVID-19</td>
<td></td>
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<tr>
<td>Equipo de protección personal COVID-19</td>
<td></td>
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<tr>
<td>Otro (por favor especifique):</td>
<td></td>
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</tr>
</tbody>
</table>
6. ¿Con qué programas de CAPK ha tenido contacto en los últimos 12 meses?

☐ 2-1-1 Kern
☐ Programa de visitas domiciliarias
☐ Educación sobre salud y nutrición CalFresh
☐ Servicios de vivienda
☐ Climatización o asistencia con servicios públicos
☐ Centro de recursos familiares del este de kern
☐ Banco de alimentos
☐ Centro comunitario “Casa de la Amistad”
☐ Head Start o Early Head Start
☐ Centro de navegación para personas desamparadas de la calle M
☐ MCAP, siglas en inglés (Pago alternar para el cuidado de niños migrantes)
☐ Centro de recursos familiares oasis
☐ Centro juvenil Shafter
☐ VITA, siglas en inglés (Asistencia voluntaria para declaración de impuestos)
☐ WIC, siglas en inglés (Asistencia nutricional para mujeres embarazadas, bebés e infantes)
☐ Ninguno / no sé

7. ¿Cree que las vacunas COVID-19 son seguras?
☐ Si
☐ No

8. ¿Estás vacunado contra el COVID-19?
☐ Si
☐ No

9. Si no está vacunado, ¿tiene intención de vacunarse contra el COVID-19?
☐ Si
☐ No

10. ¿Tiene la intención de obtener la vacuna de refuerzo COVID-19?
☐ Si
☐ No

11. ¿Le preocupa que usted, un familiar o un amigo contraigan COVID-19?
☐ Si
☐ No
12. ¿Cree que la pandemia sigue siendo un problema en el condado de Kern?
   ○ Si
   ○ No

13. ¿Cuál es su género?
   □ Masculino
   □ Femenino
   □ Transgenero
   □ Otro

14. ¿Cuál es su estado militar?
   ○ Veterano
   ○ No es veterano

15. ¿Edad?
   

16. ¿En qué código postal vive?
   

17. ¿Nivel más alto de educación?
   ○ Bachillerato sin terminar
   ○ Bachillerato / GED
   ○ Algo de universidad (sin título)
   ○ Graduado Universitario de 2 años
   ○ Graduado Universitario de 4 años
   ○ Posgrado

18. Número de personas en el hogar
   

19. Ingreso anual de hogar
   

432
20. Raza o etnia:

- □ Hispano
- □ Nativo de Hawái/Isleño del Pacífico
- □ Blanco
- □ Indio americano / nativo de Alaska
- □ Asiático
- □ Afroamericano
- □ Múltiples razas
- □ Otro
### 2022 Community Needs Survey - Partner/Agency

1. Which services are needed in your community? (Please check one box per service)

<table>
<thead>
<tr>
<th>Service</th>
<th>Most Needed</th>
<th>Somewhat Needed</th>
<th>Not Needed</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adult Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-School (Kindergarten readiness)</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Job Skills Training</td>
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2. What services are most needed to help people due to COVID-19 pandemic?

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<td>COVID Vaccination locations/information</td>
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Other (please specify)
3. What is your primary role in the community? (Please check one)

☐ Faith Based Organization

☐ Private Sector Representative

☐ Community Organization / Partner

☐ Educational Institution

☐ Government/ Public Sector

☐ Other (please specify)
4. Which CAPK Program have you primarily worked with over the past 12 months? (Check all that apply)

☐ 2-1-1 Kern
☐ Home Visiting Program
☐ CalFresh Healthy Living & Nutrition Education
☐ East Kern Family Resource Center
☐ Coordinated Entry Services
☐ Energy Program (Utility Assistance and Weatherization)
☐ Housing Services
☐ Food Bank
☐ Friendship House Community Center
☐ Head Start/ Early Head Start
☐ M Street Low Barrier Homeless Navigation Center
☐ Migrant Childcare Alternative Payment
☐ Oasis Family Resource Center
☐ Shafter Youth Center
☐ Volunteer Income Tax Assistance (VITA)
☐ Women’s Infants and Children Nutrition Assistance (WIC)
☐ None/Don’t Know

5. What is your agency’s primary targeted service population?


6. In your opinion, what are the gaps in services needed in Kern County?


**2022 Community Needs Survey - Board Member and Volunteers**

1. Please note your level of need for each topic below.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Most Needed</th>
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<td>More education for my child</td>
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<tr>
<td>Skills for a job</td>
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<td>Knowledge about finances</td>
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<td>Better health or eating habits</td>
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<td>Programs for seniors</td>
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<tr>
<td>Financial Education (credit assistance, knowledge about household budget management or starting a business)</td>
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</table>
Assistance with starting a business

Affording a housing

Homelessness

High or overdue utility bills

Domestic Violence

Local gang or violence

Other (please specify)

2. What services are most needed to help people due to COVID-19 pandemic?

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</tbody>
</table>

Other (please specify)
3. What is your primary role in the community? (Please check one)

☐ Staff / Employee
☐ Board Member
☐ Volunteer/ Intern

4. Which CAPK Program have you primarily worked with over the past 12 months? (Check all that apply)

☐ 2-1-1 Kern
☐ Home Visiting Program
☐ CalFresh Healthy Living & Nutrition Education
☐ East Kern Family Resource Center
☐ Coordinated Entry Services
☐ Energy Program (Utility Assistance and Weatherization)
☐ Housing Services
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☐ Friendship House Community Center
☐ Head Start/ Early Head Start
☐ M Street Low Barrier Homeless Navigation Center
☐ Migrant Childcare Alternative Payment
☐ Oasis Family Resource Center
☐ Shafter Youth Center
☐ Volunteer Income Tax Assistance (VITA)
☐ Women's Infants and Children Nutrition Assistance (WIC)
☐ None/Don't Know
5. What is your gender?

☐ Male

☐ Female

6. What is your military status?

☐ Veteran

☐ Not a Veteran

7. What is your age?

☐

8. What Zip Code do you live in?

☐

9. What is the highest level of education that you have completed?

☐ Less than High School

☐ High School Grad/GED

☐ Some College (No Degree)

☐ 2 year College Graduate

☐ 4 year College Graduate

☐ Post Graduate Degree

10. How many people live in your household?

☐

11. Annual Household Income?

☐
12. What is your race/ethnicity?

☐ American Indian/Alaskan Native
☐ Asian
☐ Black/African American
☐ Hispanic
☐ Native Hawaiian/Pacific Islander
☐ White/Caucasian
☐ Multi Race
☐ Other

13. Is there anything else you would like to share about the needs in your community?

2022 Community Needs Survey - Board Member and Volunteers
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<td>Pete Parra EHS</td>
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<td>2584 Felsite Ave</td>
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<td>San Diego</td>
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<td>County</td>
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<td>Zip</td>
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<tr>
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<td>Shafter HS</td>
<td>452 W Los Angeles</td>
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<tr>
<td>YCS</td>
<td>Shafter Youth Ctr</td>
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<tr>
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<td>WIC</td>
<td>500 E California Ave</td>
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<td>Crestline</td>
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<td>HNS</td>
<td>WIC-Needles</td>
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<td>6019 Niles #3</td>
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<td>814 No Norma St</td>
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<td>WIC-Olddale</td>
<td>525 Roberts Ln</td>
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<td>HNS</td>
<td>WIC-Tehachapi</td>
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<td>HNS</td>
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<td>Willow</td>
<td>401 Willow</td>
<td>Bakersfield</td>
<td>93308</td>
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</table>
CAPK Monitoring of Subrecipients, form the CAPK Finance Policy and Procedure Manual

SUBRECIPIENTS

Making Subawards

From time to time, CAPK may find it practical to make subawards of federal funds to other organizations. All subawards will be subject to the CODE OF CONDUCT policies described in the PURCHASING POLICIES AND PROCEDURES section. In addition, all subrecipients must be approved in writing by the federal awarding agency and agree to the subrecipient monitoring provisions described in the next section.

CAPK is required to evaluate each subrecipient’s risk of noncompliance with federal statutes, regulations, and the terms and conditions of the subaward to determine the appropriate monitoring. Evaluations may include such factors as: (2 CFR Part 200.331(b))

- The subrecipient’s prior experience with the same or similar subawards;
- The results of previous audits including whether or not the subrecipient receives a Single Audit, and the extent to which the same or similar subaward has been audited as a major program;
- Whether the subrecipient has new personnel, or new or substantially changed systems; and
- The extent and results of federal awarding agency monitoring (e.g., if the subrecipient also receives federal awards directly from a federal awarding agency).

In addition, CAPK will obtain the following documents from all new subrecipients:

1. Articles of Incorporation
2. Bylaws or other governing documents
3. Determination letter from the IRS (recognizing the subrecipient as exempt from income taxes under IRC section 501(c)(3))
4. Last three years’ Forms 990 or 990-EZ, including all supporting schedules and attachments (also Form 990-T, if applicable)
5. Copies of the last three years’ audit reports and management letters received from subrecipient’s independent auditor (including all reports associated with audits performed in accordance with 2 CFR Part 200 Subpart F, if applicable)
6. Copy of the most recent internally-prepared financial statements and current budget
7. Copies of reports of government agencies (Inspector General, state or local government auditors, etc.) resulting from audits, examinations, or monitoring procedures performed in the last three years

CAPK will ensure that every subaward is clearly identified to the subrecipient as a subaward and include the following data elements at the time of the subaward and if any of the data elements change, including changes in subsequent subaward modifications. When some of this information is not available, CAPK will provide the best information available to describe the federal award and subaward. The following required information will be provided to all subrecipients:

1. Federal Award Identification.

Subrecipient name (which must match the name associated with its unique entity identifier);

Subrecipient's unique entity identifier (DUNS)
Federal Award Identification Number (FAIN);

d. Federal Award Date;

e. Subaward Period of Performance Start and End Date;

f. Amount of federal funds obligated by this action;

g. Total Amount of federal funds obligated to the subrecipient;

h. Total Amount of the federal award;

i. Federal award project description, as required to be responsive to the Federal Funding Accountability and Transparency Act (FFATA);

j. Name of federal awarding agency, pass-through entity, and contact information for awarding official;

k. Catalogue of Federal Domestic Assistance (CFDA) Number and Name. CAPK must identify the dollar amount made available under each federal award and the CFDA number at time of disbursement;

l. Identification of whether the award is research and development (R & D); and

m. Indirect cost rate for the federal award (including if the de minimis rate is charged per 2 CFR Part 200.414 Indirect (F&A) costs).
Additional Resources

Tax Preparation Services

United Way of Kern
1707 Eye St. Floor 3
Bakersfield, CA 93301
(661) 834-1820

Internal Revenue Service
212 Coffee Rd.
Bakersfield, CA 93308
(661) 358-4399

Homeless Services

Housing Authority of the County of Kern
601 24th Street
Bakersfield, CA 93301
(661) 631-8500

Catholic Charities
825 Chester Ave
Bakersfield, CA 93301
(661) 281-2130

Kern Behavioral Health and Recovery Services/Substance Abuse
2001 28th Street
Bakersfield, CA 93301
(661) 868-8080

Community/Family Services

The Open Door Network
1921 19th St.
Bakersfield, CA 93301
(661) 322-9199

Kern County Department of Human Services
100 E. California Ave.
Bakersfield, CA 93307
(661) 631-6000

East Kern

Clinica Sierra Vista
730 N Norma St. Suite A
Ridgecrest, CA 93555
(760) 375-4357
Salvation Army (Ridgecrest)
151 N. Downs St.
Ridgecrest, CA 93555
(760) 375-7219

Community College Services
16940 CA-14
Mojave, CA 93501
(661) 824-5020

Salvation Army (Tehachapi)
538 E Tehachapi Blvd
Tehachapi, CA 93561
(661) 823-9508
Helping People... Changing Lives.
Community Action Plan & Community Needs Assessment

• Every two years, Community Action Partnership of Kern (CAPK) conducts a Community Needs Assessment (CNA) to identify current and emerging needs for the communities of Kern County.

• Data collected from a community needs survey is used to identify priority community needs and is used as a guide in creating CAPK’s strategic goals and action plan. This report is a foundation for CAPK’s continuous improvement.

• Client input is a critical part of the CNA and helps strengthen current CAPK programming and/or develop new programming.
2024/2025
Community Needs Assessment and
Community Action Plan

California Department of Community Services and Development

Community Services Block Grant

DRAFT
Service Delivery System and Monitoring

Customer Relations Software (CRM)
Leveraging Funding Sources

4. Describe how your agency will leverage other funding sources and increase programmatic and/or organizational capacity. (California Government Code Section 12747)

Continuous leveraging of funding—both monetary and in-kind—along with other support partners and volunteers help CAPK to maintain and grow capacity to serve through its existing 19 diverse programs to assist and empower individuals and families across communities served. CAPK leadership and staff are fully engaged as cooperative and collaborative partners, seeking existing and new opportunities to apply for funding support and partnerships through grants, projects and activities aligned with the agency mission and philosophy and purpose to end and improve lives across Kern County.

In January 2021, CAPK created a Foundation to support fundraising of gap funding and grow unrestricted funding capacity as described in Goal 6 of the Strategic Plan.

An example is the CAPK Foundation. As the philanthropic support to Community Action Partnership of Kern, the CAPK Foundation is dedicated to addressing the immediate funding needs of the agency and to serve as a catalyst by supporting the essential tools and resources we provide to the community. The Foundation supports programs that have funding gaps or funding limitations by delivering a comprehensive scope of services through philanthropic fundraising. This resource was leveraged as we began fundraising for the Food Bank Capital Expansion totaling $15.6 Million in construction funds. The agency and the Foundation were able to source nine (9) lines of funding, consisting of city, county, state-departments, federal allocation, and philanthropic dollars through a local grower. The project is underway and did not require a loan or reliance on the line of credit.
CAPK Emergency Supplies, Services, and Nutritious Foods

• In April of 2023, the Food Bank implemented an online portal for pantry sites to "check out" food from our food bank.

This implementation has helped:

- Less time at the Food Bank
- Increased the pounds of food distributed.
Applying the Results Oriented Management and Accountability (ROMA)

To ensure ROMA principles are integrated into CAPK practices and programs, the agency has invested in ROMA Implementor certifications.

The four staff members above are the cohort ROMA Implementor graduates. As a result of their ROMA training, these staff members have applied ROMA strategies in the agency by:

- Creating ROMA driven logic models to funding applications
- Created a client satisfaction survey in the CAPK website
- Developed new service lines with ROMA fundamentals
Community Action Partnership of Kern
Community Needs Assessment, 2023

Helping People... Changing Lives.

The Promise of Community Action
Community Action changes people’s lives, embodies the spirit of hope, improves communities and makes America a better place to live. We care about the entire community, and are dedicated to helping people help themselves and each other.
Kern County Demographics

**Kern County Race and Ethnicity, 2021**

- **White**: 62.3%
- **Black**: 5.4%
- **American Indian**: 1.0%
- **Asian**: 4.8%
- **Native Hawaiian and Pacific Islander**: 0.1%
- **Some Other Race**: 13.8%
- **Hispanic**: 54.7%

**Kern County Population and Growth, 2021**

<table>
<thead>
<tr>
<th>City</th>
<th>2019</th>
<th>2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arvin</td>
<td>21,249</td>
<td>20,674</td>
<td>-3%</td>
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<tr>
<td>Bakersfield</td>
<td>377,917</td>
<td>398,756</td>
<td>6%</td>
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<tr>
<td>California City</td>
<td>13,826</td>
<td>14,914</td>
<td>8%</td>
</tr>
<tr>
<td>Delano</td>
<td>52,866</td>
<td>55,487</td>
<td>5%</td>
</tr>
<tr>
<td>Maricopa</td>
<td>1,229</td>
<td>1,314</td>
<td>7%</td>
</tr>
<tr>
<td>McFarland</td>
<td>14,823</td>
<td>14,085</td>
<td>-5%</td>
</tr>
<tr>
<td>Ridgecrest</td>
<td>28,755</td>
<td>27,989</td>
<td>-3%</td>
</tr>
<tr>
<td>Shafter</td>
<td>19,477</td>
<td>22,642</td>
<td>16%</td>
</tr>
<tr>
<td>Taft</td>
<td>9,372</td>
<td>18,113</td>
<td>93%</td>
</tr>
<tr>
<td>Tehachapi</td>
<td>12,680</td>
<td>31,281</td>
<td>147%</td>
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<tr>
<td>Wasco</td>
<td>27,193</td>
<td>28,337</td>
<td>4%</td>
</tr>
<tr>
<td>Balance of County</td>
<td>320,815</td>
<td>272,052</td>
<td>-15%</td>
</tr>
</tbody>
</table>

**Total** | 900,202 | 905,644 | 1% (Average) |

Source: US Census, 2021
Kern County Poverty

Source: US Census, 2021
Causes of Poverty

Kern County Unemployment 2020 - March 2023

Source: California Department of Labor, 2023

Kern County Educational Attainment and Poverty, 2021

Source: US Census, 2021
Conditions of Poverty

According to the U.S. Department of Housing and Urban Development, the maximum threshold income that should be paid for rent is approximately 25 Percent (gross income)
Participants

- **Client Survey Responses**
  - 140 in Spanish
  - 780 in English
- **Partner Surveys**
  - 175
- **Board Members**
  - 13

Total: 1,108
Outreach

Surveys were conducted through various mediums such as paper and pencil, online forms, telephone, or face-to-face interviews.

Food distributions
CAPK staff attended food distribution sites around the county to collect surveys.

Community Events
This includes partnership events, resource fairs, local events, and CAPK organized events.

Social media
Posts were made via Facebook, Instagram, LinkedIn, and Twitter.

Direct Mailers
Direct mailers were sent to community members throughout Kern County.

Partnerships
CAPK reached out to local organizations for their help to promote the community survey.

Programs
Program staff promoted the surveys and supported clients with completing it.
Results

Table 1: Needs Table

<table>
<thead>
<tr>
<th>Needs Identified</th>
<th>Level</th>
<th>Agency Mission (Y/N)</th>
<th>Currently Addressing (Y/N)</th>
<th>Agency Priority (Y/N)</th>
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<tr>
<td>Affordable Housing</td>
<td>Community</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Mental Health Treatment</td>
<td>Family</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
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<tr>
<td>Nutritious Food</td>
<td>Family</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
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<tr>
<td>After-School Programs</td>
<td>Community</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Homeless Services</td>
<td>Community</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

Needs Identified: List the needs identified in your most recent CNA.
Level: List the need level, i.e., community or family. Community Level: Does the issue impact the community, not just clients or potential clients of the agency? For example, a community level employment need is: There is a lack of good paying jobs in our community. Family Level: Does the need concern individuals/families who have identified things in their own life that are lacking? An example of a family level employment need would be: Individuals do not have good paying jobs.
Essential to Agency Mission: Indicate if the identified need aligns with your agency’s mission.
Currently Addressing: Indicate if your agency is already addressing the identified need.
Agency Priority: Indicate if the identified need will be addressed either directly or indirectly.

Strategies

Affordable Housing
- Member of the Affordable Housing Coalition, Coordinated Entry Systems, and completed a comprehensive Housing Assessment.
- Strategies towards the reduction of burden – through energy department/weatherization

Mental Health Treatment
- Referrals & M St. Navigation Center

Nutritious Food
- CAPK Food Bank, Cal Fresh, & Central Kitchen

After-School Programs
- Friendship House Community Center
- Shafter Youth Center

Homeless Services
- M St. Navigation Center, Coordinated Entry Systems, & Member of Kern Regional Homeless Collaborative or CoC
Questions?
MEMORANDUM

To: Board of Directors

From: Jerry Meade, Head Start Assistant Director - Program

Date: June 28, 2023

Subject: Agenda Item V(e): Head Start and Early Head Start Kern Carryover Request 2023– Action Item

Head Start and Early Head Start Kern is requesting a Carryover Request for the 2023-2024 budget year. This request will permit the transfer of a balance from the 2022-2023 budget period that ended in February 2023 into a current budget period to support incomplete activities. The Head Start and State Child Development Division seeks a budget carryover of $3,523,819 which includes Base, Training and Technical Assistance.

Carryover of Base funds will be utilized to complete minor and major renovations projects at our child development centers that began in the previous year but were not completed. The projects included our classroom modifications at Oasis, Stockdale Head Start, the Barnett House in SJC as well as the warehouse renovations at Angela Martinez. Additional items from this carry over will include equipment purchases approved from OHS in the previous year including Central Kitchen replacement vehicles. T&TA funds will be utilized to support professional development opportunities for HS/EHS.

This proposal was formulated through discussions with the Region IX Office, as well as our CAPK Finance team. Through these discussions, and previously submitted budget revisions, we have determined that the unobligated balance is equal to the amount that is being requested.

These projects align with CAPK’s strategic goal to support school readiness by increasing the quality of our classrooms and supporting the delivery of services. The program will move forward with the renovations as contracted pending the approval from OHS. We do not expect delays in the completion of the renovations as a result of this request either.

Recommendation
Staff recommends the Board of Directors approves with resolution the submission of the Head Start and Early Head Start Kern Carryover Request for the 2023-2024 funding period for the grant #09CH011132.

Attachment:
HS EHS Kern Carryover Request Resolution
RESOLUTION # 2023-11

A Resolution of the Board of Directors
of Community Action Partnership of Kern
Approving the HS/EHS 2023-2024 Carry Over

The Board of Directors of Community Action Partnership of Kern, met on June 28, 2023, at a regularly scheduled meeting, at the CAPK Administrative Offices located at 5005 Business Park North, Bakersfield, CA 93309 and resolved as follows:

WHEREAS, Community Action Partnership of Kern (CAPK) is a private, non-profit 501(c)(3) corporation established as a result of the Economic Opportunity Act of 1964, and is the federally designated community action agency serving the low-income, elderly and disadvantaged residents of Kern County; and

WHEREAS, CAPK is charged with the responsibility of continuing the battle to alleviate poverty in Kern County by developing and implementing creative and innovative programs, and has adopted the philosophical position of “Helping People, Changing Lives’ in its quest to assist people in need, and families with minimal or no resources; and

WHEREAS, the Head Start and State Child Development Division has requested to submit a Carryover Request for the Head Start and Early Head Start Grant #09CH011132 in the 2023-2024 budget year; and

WHEREAS, the Head Start and State Child Development Division seeks a budget carryover of $3,523,819; and

WHEREAS, the Office of Head Start requires that an authorized signatory be named for the Head Start and Early Head Start contract; and

NOW, THEREFORE, be it resolved that the CAPK Board of Directors hereby authorizes the Chief Executive Officer to act on behalf of the Board as CAPK’s representative signatory with regard to the submission of a Carryover Request for the Head Start and Early Head Start Grant #09CH011132 for the 2023-2024 budget period.

APPROVED by a majority vote of the Directors of Community Action Partnership of Kern, this 28th day of June 2023.

Fred Plane, Chair
CAPK Board of Directors
Head Start & Early Head Start
School Readiness Goals
2023-2024

Policy Council Approval
June 2023

Board of Directors Approval
June 2023
School Readiness Plan 2023-2024
Head Start and State Child Development Division

Overview
Program staff will support Early Head Start and Head Start in the effort to improve outcomes for children and strengthen school readiness for children and families. We will implement this by following Head Start Early Learning Outcomes Framework (HSELOF), Parent, Family, and Community Engagement Framework, California’s Early Learning Development System, and child data sources from screenings and assessments. The HSELOF foundations are written for each of the domains based on research and evidence and enhanced with expert practitioners' suggestions and examples; their purpose is to promote understanding of children’s learning and to guide instructional practice. Teachers, administrators, parents, and policymakers will use the HSELOF as a springboard to augment efforts to enable all young children to acquire the competencies that will prepare them for success in school.

Our School Readiness goals are developed by using current data and ongoing child assessments that include the DRDP 2015, A Developmental Continuum from Early Infancy to Kindergarten Entry, implemented into the classroom during the 2022-2023 school year. The primary goals were determined by analyzing and comparing children’s data from the Spring Assessment (2022-2023), which aggregated all three (3) assessment periods (Fall, Winter & Spring). School Readiness Goals will reflect successful learning across five key areas of learning and development: Approaches to Learning, Social-Emotional Development, Language and Literacy, Cognition, and Physical Development.

Program staff will work in partnership with families to promote Parent, Family, and Community Engagement Outcomes that support school readiness goals. The partnership between parents and Head Start/Early Head Start staff is fundamental to children’s current and future success in school readiness and beyond.

Our Program and partners will continue to research and remain abreast of the most up-to-date information on school readiness for Early Head Start, Head Start, and Home-Based options. To promote inclusion, we implement educational goals for all children with established Individualized Educational Plans (IEP) or Individualized Family Service Plans (IFSP) with input from our Content Area Specialists and Local Education Agencies. The School Readiness Goals are also used to help identify training topics to support professional development. Training will be offered during pre-services and throughout the upcoming program year.

DATA ANALYSIS AND REFLECTION
Each program year we design our professional development to support individualized learning and improve teaching practices, including family engagement. This is accomplished by identifying trends in children’s development during the end of the year data aggregation. All developmental domains are planned during the year to improve teaching practices and promote higher learning outcomes. During the 2022-2023 program year we have selected key findings to develop skills and practices that will continue to strengthen the following domains:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Domain</th>
<th>Key Finding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infant 6 weeks to 7 months</td>
<td>Language and Literacy Development</td>
<td>LLD 2 Responsiveness to Language</td>
</tr>
<tr>
<td>Older Infants 8 months to 17 months</td>
<td>Approaches to Learning</td>
<td>ATL 2 Self- Comforting</td>
</tr>
<tr>
<td>Toddlers 18 months to 36 months</td>
<td>Cognition</td>
<td>COG 3 Number Sense of Quantity</td>
</tr>
<tr>
<td>Preschool 3-year old's</td>
<td>Language and Literacy Development</td>
<td>LLD 8 Phonological Awareness</td>
</tr>
<tr>
<td>Preschool 4-year old's</td>
<td>Cognition</td>
<td>COG 1 Spatial Relationships</td>
</tr>
</tbody>
</table>
**Background**

Data Aggregation is the key element to ensure good practices when designing or identifying program improvement. Head Start / State Child Care has utilized the following data sources: ChildPlus Net, Developmental Screening; ASQ-3, ASQ: SE-2, Child Care Results, Desired Results Developmental Profile (2015), CLASS, ECERS, and ITERS.

Recognizing that collaboration is vital for children's success, the following representatives analyzed, planned, reviewed, and shared their recommendations for the development of the **Early Head Start & Head Start School Readiness Goals**:

**Phase One:** April 2023
2022-2023 School Readiness Goals Data Aggregation and Analysis.

**Phase Two:** May 18, 2022
2023-2024, Collaborative School Readiness Meeting

**Phase Three:** May 22, 2022
2023-2024 School Readiness Goal Setting Collaborative Meeting

**Phase Four:** May 25, 2023
2023-2024 School Readiness Administration Team Review and Feedback

**Phase Five:** June 8, 2023
2023-2024 School Readiness Sub-Committee Collaboration and Feedback

**Phase Six:** June 2023
2023 – 2024 School Readiness Goals Policy Council Approval

**Phase Seven:** June 2023
2023 – 2024 School Readiness Goals Board of Directors Approval

**Phase Eight:**
July–November 2023 -2024 School Readiness Training and Implementation
Framework for Effective Practice: Supporting School Readiness for all Children

**Parent, Family, and Community Engagement**

**Head Start Early Learning Outcomes Framework**

**What Children Learn**

<table>
<thead>
<tr>
<th>CENTRAL DOMAINS</th>
<th>APPRAOCHES TO LEARNING</th>
<th>SOCIAL AND EMOTIONAL DEVELOPMENT</th>
<th>LANGUAGE AND LITERACY</th>
<th>COGNITION</th>
<th>PERCEPTUAL, MOTOR, AND PHYSICAL DEVELOPMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>INFANT/TODDLER DOMAINS</td>
<td>Approaches to Learning</td>
<td>Social and Emotional Development</td>
<td>Language and Communication</td>
<td>Cognition</td>
<td>Perceptual, Motor, and Physical Development</td>
</tr>
<tr>
<td>PERSCHOOLER DOMAINS</td>
<td>Approaches to Learning</td>
<td>Social and Emotional Development</td>
<td>Language and Communication</td>
<td>Literacy</td>
<td>Scientific Reasoning</td>
</tr>
</tbody>
</table>
Early Head Start/Head Start
2023-2024 School Readiness Goals

**Approaches to Learning – Self-Regulation**
**Goal:** Children will exhibit increased skills in approaches to learning, including curiosity and initiative, self-control of feelings and behaviors, engagement and persistence, and shared use of space & materials.

**Social and Emotional Development**
**Goal:** Children will strengthen their skills in social behavior, emotional regulation, and emotional well-being.

**Language and Literacy Development**
**Goal:** Children will demonstrate increased communication, language, and emergent literacy skills.

**English Language Development**
**Goal:** Children will demonstrate increased communication, language, and emergent literacy skills.

**Cognition and General Knowledge (Including Math and Science)**
**Goal:** Children will strengthen their skills in cognition, including math and science.

**Physical Development-Health**
**Goal:** Children will demonstrate improved physical development, including personal care routines.
### Early Head Start

#### Approaches to Learning (ATL-REG)

**Goal:** Children will exhibit increased skills in approaches to learning, including self-comforting, attention maintenance, and self-control of feelings and behaviors.

**Objective:** By Spring 2024 infants and toddlers will develop the capacity to comfort and soothe themselves in response to stress.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Young Infants 0-9 months</strong></td>
<td><strong>Older Infants 9-18 months</strong></td>
</tr>
<tr>
<td>49% will be at the “Responding Later” level or above in measure ATL-REG2</td>
<td>64% will be at the “Exploring Earlier” level or above in measure ATL-REG 2</td>
</tr>
<tr>
<td><strong>Toddlers</strong></td>
<td>35% will be at the “Exploring Middle” level or above in measure ATL-REG 2</td>
</tr>
</tbody>
</table>

**Family Engagement Outcome:** Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s Approaches to Learning in the effort to prepare them for school as measured by pre- and -post surveys at parent meetings and training.

#### Early Head Start Home Based

**Effective Home Visiting Strategies**
- Encourage families to label their Childs and their own emotions. (happy, sad, angry, scared, and excited)
- Work with families to develop a morning routine with their child to support self-comfort.
- Support families with techniques to self-regulate and destress, including using deep breathing and counting, using Tucker the Turtle Technique during home visits and group socializations.
- Encourage families to prepare their child for the next transition by providing verbal or visual cues (refer to visual schedule, ringing a bell, and allow 3-5 minutes warning before the next activity.)

**Effective Learning Experiences**
- Practice techniques to self-regulate and destress, encourage deep breathing, and count with your child.
- Provide soft materials and comfort items such as, stuffed animals, blankets, or other objects to soothe your child.
- Make a family photo album with your child to support in recognizing the different family members that may comfort your child.
- Create a daily schedule for your child at home and practice verbal or visual cues; allow your child time to process and respond by providing a 3–5-minute warning before moving on to the next activity.

#### Early Head Start Center Based

**Effective Teaching Strategies**
- Support children in labeling their emotions. (happy, sad, angry, and excited).
- Support children in using different techniques to self-regulate and destress by introducing deep breathing, counting, and Tucker Turtle Technique.
- Explore sense of identity and belonging by having pictures of children’s families in the classroom.
- Prepare children for the next transition by allowing ample time, provide verbal/visual cues (refer to classroom visual schedule (dim lights, ring a bell, and allow 3-5-minute warning before the next activity).

**Effective Family Activities**
- Practice techniques to self-regulate and destress, deep breathing and counting.
- Make a family photo album with your child to support in recognizing the different family members that may comfort them.
- Create a daily schedule for your child at home and practice verbal or visual cues, allow your child time to process and respond by providing a 3–5-minute warning before moving on to the next activity.
# Head Start

## Approaches to Learning (ATL-REG)

### Goal:
Children will exhibit increased skills in approaches to learning, including self-comforting, imitation, attention maintenance, and self-control of feelings and behaviors.

### Objective:
By Spring 2024 children will increasingly develop the capacity to pay attention to their surroundings and comfort or soothe themselves in response to distress from stimulation.

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td><strong>Preschool 3 -year-olds</strong></td>
<td><strong>Preschool 4 -year-olds</strong></td>
</tr>
<tr>
<td>62% will be at the “Building Middle” level or above in measure ATL-REG 2</td>
<td>71% will be at the “Building Middle” level or above in measure ATL-REG 2</td>
</tr>
</tbody>
</table>

### Family Engagement Outcome: Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s Approaches to Learning in the effort to prepare them for school as measured by pre- and post surveys at parent meetings and training.

## Head Start Home Based

### Effective Home Visiting Strategies
- Encourage families to establish simple and consistent household rules with their child provide modeling and resources to support families.
- Encourage families to practice simple techniques for self-regulation and ways to and destress, i.e., deep breathing and counting using Tucker Turtle Technique during home visits and group socializations.
- Encourage families to provide children with responsibilities for simple household tasks, i.e., setting the table for meals, sorting laundry, and cleaning up toys.
- Encourage families to play simple turn-taking games with their child.

### Effective Learning Experiences
- Establish consistent simple household rules with your child.
- Engage in pretend play with your child (pretend to be a doctor, playing dress up and pretend cooking).
- Establish and practice simple tasks at home with your child, such as setting the table, sorting laundry, and other assigned jobs.
- Play follow the leader.

## Head Start Center Based

### Effective Teaching Strategies
- Establish simple classroom rules and expectations with photos.
- Use different techniques to self-regulate and destress by introducing deep breathing, counting, and Tucker Turtle Technique.
- Provide children with responsibilities for simple classroom chores, (Setting the table, line leader, or other assigned tasks.)
- Explore the sense of identity and belonging by having pictures of children’s families in the classroom, (Show and tell, invite families to participate.)
- Encourage children to participate in simple games and turn-taking opportunities, (Simon says, dominos, roll the dice, bingo).

### Effective Family Activities
- Establish consistent simple household rules with your child.
- Engage in pretend play with your child, (Dress up, play doctor, pretend cooking).
- Establish and practice simple tasks at home with your child, (Setting the table, sorting laundry, or doing other chores.)
- Make a family photo album with your child to support in recognizing the different family members.
- Play simple turn-taking games with your child, (Simon says, dominos, roll the dice, bingo.)
Early Head Start

Social and Emotional Development (SED)

**Goal:** Children will exhibit improved awareness of identity of self in relation to others and social emotional understanding.

**Objective:** By Spring 2024 infants and toddlers will become increasingly competent and cooperative in interactions with

<table>
<thead>
<tr>
<th>DRDP Measure</th>
<th>Head Start Early Learning Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>SED 1: Identity of Self in Relation to Others</td>
<td>Goal IT SE9 and IT SE10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Young Infants 0-9 months</th>
<th>Older Infants 9-18 months</th>
<th>Toddlers</th>
</tr>
</thead>
<tbody>
<tr>
<td>43% will be at the “Exploring Middle” level or above in measure SED 1</td>
<td>59% will be at the “Exploring Middle” level or above in measure SED 1</td>
<td>31% will be at the “Exploring Middle” level or above in measure SED 1</td>
</tr>
</tbody>
</table>

**Family Engagement Outcome:** Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s Social and Emotional development in the effort to prepare them for school as measured by pre- and -post surveys at parent meetings and training.

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### Early Head Start Home Based

<table>
<thead>
<tr>
<th>Effective Home Visiting Strategies</th>
<th>Effective Learning Experiences</th>
</tr>
</thead>
</table>
| • Provide activities that engage the senses such as boxes, sand/water table activities, mirrors, and smelling jars. Educators will provide parents with suggested questions to facilitate the child to explore materials using sight, sound, touch, and taste.  
• Encourage parents to explore language during routines. Repeat the sounds or words child utters, add simple words, and allow the child time to repeat them.  
• Educators will greet the children and family members warmly during their visit. Invite families to share recent events or challenges. Demonstrate how to connect and relate to others. | • Utilize home materials to explore the senses of the children such as touching soap bubbles(touch), smelling spice jars(smell), following the beam of a flashlight across a wall(sight), tasting different foods (taste), or dancing to diverse types of music (sound).  
• Talk and add language during daily routines. For instance, during baths, name body parts such as arms and legs.  
• Use family photos to identify the people by name, their relationship, and describe physical characteristics. |

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### Early Head Start Center Based

<table>
<thead>
<tr>
<th>Effective Teaching Strategies</th>
<th>Effective Family Activities</th>
</tr>
</thead>
</table>
| • Provide activities that engage the senses such as boxes, sand/water table activities, mirrors, and smelling jars. Teachers will encourage the child to explore materials using sight, sound, touch, and taste.  
• Utilizing feeling mirrors in the classroom. Teachers will mimic the child’s facial expressions and describe their movements.  
• Listen to environmental sounds such as animals, vehicles, and familiar voices. Identify the sounds and point them out to the children. | • Provide food of assorted colors, sizes, and textures. They can label the colors and describe the taste and smell.  
• During feeding and bath time the family can label the parts of their bodies and describe the movements of the child and family member.  
• Utilize mirrors in the home to label their body parts and facial expressions. Describe their color, size, or use. |
Head Start

Social and Emotional Development (SED)

**Goal:** Children will demonstrate improved awareness of identity of self in relation to others and social and emotional understanding.

**Objective:** By Spring 2024 children will develop an understanding of people’s behavior, feelings, and thoughts as well as increasing awareness of self as distinct from others.

<table>
<thead>
<tr>
<th>DRDP Measure: SED 2: Social and Emotional Understanding</th>
<th>Head Start Early Learning Outcome: Goal P SE 6, P SE 7, P SE 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preschool 3-year-olds</td>
<td>Preschool 4-year-olds</td>
</tr>
<tr>
<td>35% will be at the “Building Middle” level or above in measure SED 2</td>
<td>12% will be at the “Building Middle” level or above in measure SED 2</td>
</tr>
</tbody>
</table>

**Family Engagement Outcome:** Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s Social and Emotional development in the effort to prepare them for school as measured by pre- and post surveys at parent meetings and training.

**Effective Home Visiting Strategies**

- Discuss the importance of labeling and acknowledging feelings. Share materials such as feeling charts, Tucker Turtle stories, or scripted stories such as “I can be a friend.”
- Encourage the usage of emotional language, identifying feelings, and managing conflict.
- Read books that encourage the children to show care and concern for the characters. For instance, does the child feel sad at the end of the book, “The Tree Names Steve.”
- Encourage the children to offer ways to comfort the family.
- Provide materials to assist in peer perspective-taking such as solution cards and discuss how they can assist their child in communicating their feelings and managing their behavior.

**Effective Learning Experiences**

- Discuss acceptable home behavior expectations with your child and acceptable ways to manage emotions. For instance, what to do when a sibling screams at them.
- Support and encourage their children to help others during conflict.
- Introduce solution cards, feeling faces, and scripted stories to use in the home. This will assist with the child’s emotional literacy.
- Acknowledge the feelings of your child and other family members.
- Use mirrors for discussion. Discuss what their faces look like, what happened to make them so, and what will help the person improve their mood.

**Effective Teaching Strategies**

- Utilize Pyramid Model Materials such as feeling charts, Tucker Turtle, or scripted stories such as “I can be a friend.” These will encourage the usage of emotional language, identifying feelings, and managing conflict.
- Include children in conflict resolution and peer perspective-taking by utilizing the Solution cards. For instance, when addressing conflict with children bring in peers to identify feelings and find mutually beneficial solutions.
- Read books that encourage the children to show care and concern for the characters. For instance, does the child feel sad at the end of the book The Tree Names Steve. Encourage the children to offer ways to comfort the family.

**Effective Family Activities**

- Discuss acceptable home behavior expectations with your child and acceptable ways to manage emotions. For instance, what to do when a sibling screams at them.
- Support and encourage their children to help others during conflict.
- Introduce solution cards, feeling faces, and scripted stories to use in the home. This will assist with the child’s emotional literacy.
- Acknowledge the feelings of the children and other family members.
- Use mirrors for discussion. Discuss what their faces look like, what happened to make them so, and what will help the person improve their mood.
## Early Head Start

### Language and Literacy Development (LLD)

**Goal:** Children will demonstrate improved communication and responsiveness to language.

**Objective:** By Spring 2024 infants and toddlers will communicate or act in response to language and respond to increasingly complex language.

**DRDP Measure:** LLD 2: Responsiveness to Language

<table>
<thead>
<tr>
<th>Head Start Early Learning Outcome: Goal IT-LC1 &amp; IT-LC2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Young Infants 0-9 months</strong></td>
</tr>
<tr>
<td>60% will be at the “Exploring Earlier” level or above in measure LLD 2</td>
</tr>
<tr>
<td><strong>Older Infants 9-18 months</strong></td>
</tr>
<tr>
<td>58% will be at the “Exploring Middle” level or above in measure LLD 2</td>
</tr>
<tr>
<td><strong>Toddlers</strong></td>
</tr>
<tr>
<td>25% will be at the “Exploring Middle” level or above in measure LLD 2</td>
</tr>
</tbody>
</table>

### Family Engagement Outcome: Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s language and literacy development in the effort to prepare them for school as measured by pre- and post-surveys at parent meetings and training.

### Early Head Start Home Based

#### Effective Home Visiting Strategies

- Help families gather materials and create flannel stories and puppets.
- During socializations, encourage parents to take the lead in singing and reading activities.
- Encourage families to watch Ready Rosie videos.
- Encourage families to talk about feelings with their children, talk about how they feel and why they feel that way, giving children the time to respond and explain their feelings. Encourage parents to talk throughout the day and converse about what the children can and should do when they feel sad, mad, or angry.

#### Effective Learning Experiences

- Create flannel stories at home, encourage your child to tell stories.
- Make puppets with your child and retell stories.
- During socializations families can lead singing and reading activities.
- Incorporate Ready Rosie videos to daily routines.
- Talk about feelings with your child, talk about how they feel and why they feel that way, giving them the time to respond and explain their feelings.

### Early Head Start Center Based

#### Effective Teaching Strategies

- Introduce and use baby signs in the classroom.
- Create flannel stories with children to tell stories.
- Make puppets with the children and retell stories.
- Review emotions with the child, talk about how they feel and why they feel that way, giving children the time to respond and explain their feelings.

#### Effective Family Activities

- During feeding sing to your child (ask the teacher what songs they are singing at school and sing the same songs at home).
- When going grocery shopping, talk about the items that you need and are getting discuss the colors, shapes, and number of items.
- When conversing with your child wait to respond (look for gestures, movement, utterances, and answers).
- Review emotions with your child, talk about how they feel and why they feel that way, giving your child the time to respond and explain their feelings.
## Head Start

### Language and Literacy Development (LLD)

**Goal:** Children will demonstrate improved communication, language, phonological awareness, and letter and word knowledge.

**Objective:** By Spring 2024, children will engage in back-and-forth communication and increasing awareness of letters in the environment, including their relationship to sounds.

**DRDP Measure:** LLD 8: Phonological Awareness

<table>
<thead>
<tr>
<th>Preschool 3-year-olds</th>
<th>Preschool 4-year-olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>42% will be at the “Building Middle” level or above in measure LLD 8</td>
<td>20% will be at the “Building Middle” level or above in measure LLD 8</td>
</tr>
</tbody>
</table>

**Head Start Early Learning Outcome:** Goal P-LIT 1

### Family Engagement Outcome: Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s language and literacy Development in the effort to prepare them for school as measured by pre- and -post surveys at parent meetings and training.

### Head Start Home Based

**Effective Home Visiting Strategies:**

- Encourage families to interact with their children playing with the sounds of music.
- Encourage families to use household items to make sounds and sing along to songs.
- Encourage families to play word games that incorporate colors, shapes, syllables, and rhyming to encourage phonological awareness.

**Effective Learning Experiences**

- Interact with your child as they play with the sounds of music.
- Use household items to make sounds and sing along to songs.
- Play word games that incorporate colors, shapes, syllables, and rhyming to encourage phonological awareness.
- Review and implement S’more activities that promote language and literacy.
- Establish a reading routine and visit the public library.

### Head Start Center Based

**Effective Teaching Strategies**

- Sing songs that encourage phonics and movement. For example, clap out the syllables when singing songs.
- Set up a listening center with recordings of songs and books that include language.
- Incorporate activities that encourage rhyming.
- Play word games that incorporate colors, shapes, syllables, and rhyming to encourage phonological awareness.
- Provide one or more words that rhyme with a single given target, such as “What rhymes with log?”

**Effective Family Activities**

- Interact with your child by playing with the sounds of music.
- Use household items to make sounds and sing along to songs.
- Play word games that incorporate letters, colors, and shapes to encourage phonological awareness.
- Read books that play with sounds and words.
- Play with sounds by adding new verses to a familiar song, chant, or rhyme.
“The Head Start Approach to School Readiness means that children are ready for school, families are ready to support their children’s learning, and schools are ready for children.”
# Head Start

## English Language Development (ELD)

**Goal:** Children will demonstrate increasing understanding of symbol, letter, and print word knowledge in English and communicate in English.

**Objective:** By Spring 2024, children will show increasing progress toward fluency in speaking English.

<table>
<thead>
<tr>
<th>DRDP Measure:</th>
<th>Head Start Early Learning Outcome: Goal P-LIT 2, PP-LIT 3, and P-LIT 6</th>
</tr>
</thead>
</table>
| ELD 4: Symbol, Letter, & Print Word Knowledge in English | **Preschool 3-year-olds**  
23% will be at the “Building English” level or above in measure ELD 4 |
| **Preschool 4-year-olds**  
25% will be at the “Building English” level or above in measure ELD 4 | **Preschool 4-year-olds**  
25% will be at the “Building English” level or above in measure ELD 4 |

**Family Engagement Outcome:** Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s English language acquisition in the effort to prepare them for school as measured by pre- and post-surveys at parent meetings and training.

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**Head Start Home Based**

### Effective Home Visiting Strategies:
- Have children sign in or recognize one letter of their name in their home language and in English at the beginning of the home visit.
- As you read books, find two similarities between the book and home and label items with words.
- Use any household product or food item and then identify them in English.
- Draw pictures or use simple print for a recipe to make play dough or parfaits.
- Use parallel and self-talk throughout the visit. Map your actions and provide descriptions of objects with language.

**Effective Learning Experiences**:
- Display pictures or items that start with the letter of the week.
- Ask the child to draw a picture of their family and the teacher will dictate their responses.
- Establish a reading routine and read books in your home language daily.
- Look around your home for items that begin with the first letter of your child’s name, count how many items your child finds.

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**Head Start Center Based**

### Effective Teaching Strategies:
- Display pictures or items that start with the letter of the week.
- Read or talk to children and support them to identify symbols or items about the story or conversation.
- Ask the child to draw a picture of their family and the teacher will dictate their responses.
- Use language and literacy activities that contain repetitive refrains (i.e., singing songs and fingerplays)
- Show pictures or point to objects that illustrate or explain unfamiliar words.
- Provide pictures, objects, and other visual cues in small groups to aid comprehension of new words.

**Effective Family Activities**:
- “Stomp the letter” create flash cards with letter and scramble on floor. Call out letter in English or home language, then have child stomp on correct letter.
- “Family Dance Party” Take turns picking a song to dance to and sing along. Family can choose songs in English or in their home language.
- “Phone Fun” Have a pretend conversation in English or home language and ask questions. Encourage children to use complete sentences. If answered with one word repeat their answer in a complete sentence.
- “What Did I Do?” Using verbs in past tense, act out simple familiar actions for your child such as brushing your teeth. Ask your child “What Did I do?” “You brushed your teeth.” Take turns acting out and describing more actions.
# Early Head Start

## Cognition Including Math and Science (COG)

**Goal:** Children will demonstrate improved general cognitive skills including number sense of quantity.

**Objective:** By Spring 2024 infants and toddlers will show an increasing ability to compare, match, and sort objects into groups according to their attributes. They will also develop an understanding of number and quantity.

<table>
<thead>
<tr>
<th>DRDP Measure:</th>
<th>COG 3: Number Sense of Quantity</th>
<th>Head Start Early Learning Outcome:</th>
<th>Goal: ITC- 8, 9, ITC -10, ITC -11, ITC -12</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Young Infants 0-9 months</strong></td>
<td>51% will be at the “Exploring Earlier” level or above in measure COG 3</td>
<td><strong>Older Infants 9-18 months</strong></td>
<td>60% will be at the “Exploring Middle” level or above in measure COG 3</td>
</tr>
<tr>
<td><strong>Toddlers</strong></td>
<td>39% will be at the “Exploring Middle” level or above in measure COLG 3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Family Engagement Outcome:** Families as Advocates and Leaders

**Objective:**
By Spring, 2024 families will have increased understanding to support their child’s cognitive development in the effort to prepare them for school as measured by pre- and post-surveys at parent meetings and training.

### Early Head Start Home Based

#### Effective Home Visiting Strategies

- Have infants play with and reach out to objects provided in the home. (i.e., rattle, toy, plastic home items: bowl, cup, etc.)
- Introduce more than one object while playing; add items one at a time. Have infants play, explore and watch objects as they move in front of them.
- Do “nesting” by using items in the home such as bowls, cups, pots, and pans and insert them into each other for spatial awareness.

#### Effective Learning Experiences

- Bounce or roll a ball to your infant on the floor and have them return the ball to you.
- Count socks with your child as you do laundry.
- Sing number songs and fingerplays to encourage your child to follow along.
- Teach your child to sign certain words such as: more, less, finish, and all done.

### Early Head Start Center Based

#### Effective Teaching Strategies

- Count body parts with your infant.
- Have children try on different hats and talk about size, small, medium, and large.
- Have children count, counting activities with the teacher. Ex. counting children in attendance, counting toys being played with, etc.
- Involve children in singing number songs (i.e., 1 little, 2 little, 3 little fingers, etc.)

#### Effective Family Activities

- Give your infant objects to move from one hand to another. Offer another item and talk about the number of objects they are holding.
- Encourage your child to transport objects from one container to another for spatial awareness. Count the number of items.
- Make an obstacle course by using items in the home. Introduce words such as: on, into, under, over, etc.
# Head Start

## Cognition Including Math and Science (COG)

**Goal:** Children will demonstrate improved general cognitive skills including spatial relationships, sorting and patterning skills.

**Objective:** By Spring 2024, children will show an increasing ability to add and subtract small quantities of objects and show an understanding of how objects move outside of space or fit in different spaces.

<table>
<thead>
<tr>
<th>DRDP Measure: COG 1: Spatial Relationships</th>
<th>Head Start Early Learning Outcome: Goal P-MATH 3, P-MATH 4, P-MATH 8, and P-MATH 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preschool 3-year-olds</td>
<td>Preschool 4-year-olds</td>
</tr>
<tr>
<td>65% will be at the “Building Middle” level or above in measure COG 1</td>
<td>72% will be at the “Building Middle” level or above in measure COG 1</td>
</tr>
</tbody>
</table>

**Family Engagement Outcome:** Families as Advocates and Leaders

**Objective:** By Spring, 2024 families will have increased understanding to support their child’s cognitive development in the effort to prepare them for school as measured by pre-and post surveys at parent meetings and training.

---

### Head Start Home Based

#### Effective Home Visiting Strategies:

- Use items in the home such as: bowls, cups, pots, etc. for measuring.
- Count people in the home. Count people as they exit out and as they enter the room.
- Talk about subtracting and adding toys and books focus on more and less.
- Play hide and seek games for spatial awareness. Have children look for items that have been put out of sight. Have them search high and low.

#### Effective Learning Experiences:

- Teach comparison by using different measuring tools such as plastic household items: bowls, cups, and pots. Talk about size, volume, weight, classification, quantity, and comparison.
- Engage your child in cooking experience. Have your child add ingredients, assist in measuring ingredients, and talk about amounts.
- Have your child follow 2-3 step directions using multiple steps. For instance, First, wash your hands, then, dry your hands, and lastly, throw away the paper towels in the trash.
- Have your child explore the position of objects and space by playing “scavenger hunt.”
- Have your child search for items under a chair, on top of the table, on the side of the desk, etc.
- Have child “nest” bowls, cups, and pots. Have them see which fits into which.
- Have a sink and float activity by providing an opportunity to experiment with a variety of items that may sink and or float.

### Head Start Center Based

#### Effective Teaching Strategies:

- Build an obstacle course using items in the center. Go over prepositions such as: under, over, on, around, besides, etc.
- Have bean bag activities to go with "bean bag" songs such as: Pass the bean bag.
- Have children follow multiple step directions.
- Have children experiment with sink and float activities. Talk about more, less, heavy, light, big, small, full, empty, etc.

#### Effective Family Activities:

- Have your child explore the position of objects and space by playing “scavenger hunt.”
- Have your child search for items under a chair, on top of the table, on the side of the desk, etc.
- Have child “nest” bowls, cups, and pots. Have them see which fits into which.
- Have a sink and float activity by providing an opportunity to experiment with a variety of items that may sink and or float.
### Early Head Start

#### Physical Development Health (PD-HLTH)

**Goal:** Children will demonstrate improved personal care routines and knowledge of safety.

**Objective:** By Spring 2024 infants and toddlers will demonstrate knowledge of safety skills and refine the ability to participate and take responsibility for dressing self.

#### DRDP Measure: PD-HLTH 8: Personal Care Routines: Dressing

<table>
<thead>
<tr>
<th>Young Infants 0-9 months</th>
<th>Older Infants 9-18 months</th>
<th>Toddlers</th>
</tr>
</thead>
<tbody>
<tr>
<td>49% will be at the “Exploring Earlier” level or above in measure PD-HLTH 8</td>
<td>16% will be at the “Exploring Earlier” level or above in measure PD-HLTH 8</td>
<td>17% will be at the “Exploring Middle” level or above in measure PD-HLTH 8</td>
</tr>
</tbody>
</table>

#### Family Engagement Outcome: Families as Advocates and Leaders

**Objective:** By Spring 2024, families will have increased understanding to support their child’s physical development to prepare them for school as measured by pre- and -post surveys at parent meetings and training.

#### Early Head Start Home Based

**Effective Home Visiting Strategies:**
- Suggest activities that support children’s fine motor skills, such as dressing, zipping, buckling, buttoning, diapering, and toileting.
- Play simple games using household objects that focus on hand-eye coordination.
- Encourage children to practice putting on socks, buttoning, and zipping on sweatshirts.
- Provide resistive activities to develop hand strength, for instance, rolling clay, tearing, scrunching, and folding paper.

**Effective Learning Experiences**
- Role model fine motor skills during routines. For instance, cutting and lacing shoes.
- Encourage your child to help with simple activities/routines in the home that encourage finger movement and grasping skills.
- Allow your child to choose the clothes they want to wear, place them on a chair/bed, and encourage them to put on each piece, help when needed, and continue the process daily.

#### Early Head Start Center Based

**Effective Teaching Strategies**
- Introduce signs of potty and diapering to a young infant.
- Provide activities to strengthen hand grasp and release of toddlers and older children (ex: Squirt bottles, using clothes pins, medicine droppers, etc.)
- Provide opportunities indoors and outdoors; for children to engage in dress play and dress the baby dolls.
- Add to Dramatic Play Area: Multicolored baby dolls with clothing/ Hats/Purses/Wallets/Scarfs/ Headbands/Wristbands, Books, etc.

**Effective Family Activities**
- Have your child watch as you demonstrate a dressing task and describe the steps. Vary your language to accommodate different levels.
- Assist your child with dressing and undressing by providing one-on-one assistance and scaffolding on zipping, buttoning, etc.
- Make dressing routines fun and avoid rushing through the step-by-step process of dressing and undressing.
- Provide dress-up activity times to encourage older infants to explore.
## Head Start

### Physical Development Health (PD-HLTH)

**Goal:** Children will demonstrate improved fine motor skills and an awareness of safety.

**Objective:** By Spring 2024, children will demonstrate knowledge of safety skills and increasing precision, strength, and coordination of fine motor skills.

<table>
<thead>
<tr>
<th>DRDP Measure: PD-HLTH 5 Safety</th>
<th>Head Start Early Learning Outcome: Goal P-PMP 2 &amp; P-PMP 6</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preschool 3-year-olds</strong></td>
<td><strong>Preschool 4-year-olds</strong></td>
</tr>
<tr>
<td>25% will be at the “Building Middle” level or above in measure COG 1</td>
<td>25% will be at the “Building Later” level or above in measure COG 1</td>
</tr>
</tbody>
</table>

### Family Engagement Outcome: Families as Advocates and Leaders

**Objective:** By Spring 2024, families will have increased understanding to support their child’s physical development to prepare them for school as measured by pre- and post surveys at parent meetings and training.

### Head Start Home Base

#### Effective Home Visiting Strategies:
- Read books on safety and point out what the characters are doing that are safe behaviors
- Use safety words and vocabulary for positive phrasing of the desired behavior (redirection, taking turns, sharing, etc.)
- Practice role-playing safety scenarios, “What would you do?”
- Provide families with safety handouts.
- Create an evacuation or emergency family plan.

#### Effective Learning Experiences:
- Set safety rules and boundaries at home and be consistent.
- Play the red light and green light game and explain what those signs mean.
- Go to the local library and look for books that discuss safety. Read with your child and ask them “what if” questions.
- Give your child the opportunity to clean up after play and mealtimes. Talk about being safe and the rules in those activities.

### Head Start Center Based

#### Effective Teaching Strategies:
- Plan and implement ongoing fire and earthquake drills.
- Read books on safety and discuss scenarios from the book
- Intentionally plan for activities where sharing and turn-taking is a focus.
- Give clear and precise instructions using visuals.
- Create a classroom safety mascot/helper with the children and use it during monthly fire and earthquake drills and teach safety rules in the classroom.
- Read a book on safety: Discuss Community helpers such as Crossing Guards/Police Officers/Firefighters/Ambulance drivers.
- Invite a Crossing guard or Police office to visit the classroom to talk with the children about safety precautions.

#### Effective Family Activities:
- Go to the local library and look at books about safety (crossing the street, fire safety, stranger danger, etc.)
- Go for walks around the neighborhood, identify the street signs, and talk about pedestrian safety.
- Point out community members that keep us safe.
- Practice and design safety drills with your child, discuss what to do in an emergency, and teach your child how to dial 911 for emergencies.
- Create an emergency plan with your family.
### Professional Development Opportunities

<table>
<thead>
<tr>
<th>Objective</th>
<th>Persons Responsible</th>
<th>Timelines</th>
<th>Supporting Documents</th>
<th>Action Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Practice-Based Coaching and TLC</strong></td>
<td>Education Managers, Mentor Coaches, Data Analyst, Site Supervisors, Teaching Staff, Home Based Supervisor and Educators</td>
<td>Ongoing August 2023-June 2024</td>
<td>Classroom Management Outcomes, English Language Development (ELD) Data Outcomes, CLASS Data Outcomes, ECERS/ITERS Data Outcomes, Curriculum Monitoring Fidelity Tool, Practice-Based Coaching, Mentee Resource Folder, DRDP 2015</td>
<td>Creative Curriculum Cloud, Making the Most of Classroom Interactions Infant/Toddler Pre-k, HSELOF Training: Language and Literacy Development Cognition, DRDP Observation Training, Meaningful Observations, Environments and Environmental Rating Scales, Responsiveness to dual language learners, CLASS My Teachstone, ChildPlus Mobile</td>
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<tr>
<td><strong>Desired Results Developmental Profile</strong></td>
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<td>2x a year</td>
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<tr>
<td>Support teaching staff by establishing a year-long professional development plan focused on CLASS, specializing in Instructional Support</td>
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<td>Ongoing August 2023-June 2024</td>
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<tr>
<td><strong>Classroom Management Outcomes</strong></td>
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<td><strong>English Language Development</strong></td>
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<td><strong>Data Outcomes</strong></td>
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<td><strong>CLASS Data Outcomes</strong></td>
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<td><strong>ECERS/ITERS Data Outcomes</strong></td>
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<td><strong>Curriculum Monitoring Fidelity Tool</strong></td>
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<td><strong>Practice-Based Coaching</strong></td>
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<td><strong>Mentee Resource Folder</strong></td>
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<td><strong>DRDP 2015</strong></td>
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<td><strong>T/TA Support Plan</strong></td>
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<td>Action Steps Training and Resources</td>
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<tr>
<td><strong>Family Engagement</strong></td>
<td>Family Engagement Inclusion Manager&lt;br&gt;Family Engagement Specialists&lt;br&gt;Program Governance Coordinator&lt;br&gt;Site Supervisors&lt;br&gt;Family Service Workers&lt;br&gt;Home Based Educators</td>
<td>August 2023-&lt;br&gt;June 2024&lt;br&gt;August 2023-June 2024&lt;br&gt;August 2023&lt;br&gt;Quarterly Meetings&lt;br&gt;July 2024</td>
<td>Very Important Parent (VIP) meetings&lt;br&gt;Ready Rosie Workshops&lt;br&gt;Parent Training &amp; Workshops&lt;br&gt;Pre/Post Parent Surveys</td>
<td>Very Important Parent (VIP) Meetings&lt;br&gt;Regional Parent Committee Meetings&lt;br&gt;Early Learning Outcomes Data Comparisons&lt;br&gt;Parent Training &amp; Workshops to identify how literacy activities support School Readiness Goals.&lt;br&gt;Boost School Readiness Through Family Engagement&lt;br&gt;School Readiness Sub-Committee Meeting</td>
</tr>
<tr>
<td><strong>Health &amp; Nutrition</strong></td>
<td>CAS- Health&lt;br&gt;Family Service Workers&lt;br&gt;Site Supervisors&lt;br&gt;Teaching Staff&lt;br&gt;CAS-Nutrition&lt;br&gt;Central Kitchen Staff&lt;br&gt;Family Service Workers&lt;br&gt;Site Supervisors&lt;br&gt;Teaching Staff</td>
<td>August 2023-&lt;br&gt;June 2024&lt;br&gt;August 2023&lt;br&gt;Quarterly Meetings&lt;br&gt;July 2024</td>
<td>Hearing, Vision, and Dental ChildPlus Data&lt;br&gt;Very Important Parent (VIP) Meeting/training sign-in/out forms&lt;br&gt;Parent Handbook&lt;br&gt;Reminder Letters&lt;br&gt;Nutritional Experiences&lt;br&gt;Nutritional Advisory Committee Meetings&lt;br&gt;Very Important Parent (VIP) Presentations&lt;br&gt;Supporting Special Diets&lt;br&gt;Bioesque Disinfectant</td>
<td>Very Important Parent (VIP) Meeting handouts&lt;br&gt;CHDP Periodicity Schedule for Health&lt;br&gt;Assessment Requirements by Age Groups&lt;br&gt;Child Plus-Health Training&lt;br&gt;CHDP Provider List&lt;br&gt;Dental Roster&lt;br&gt;Nutrition Books&lt;br&gt;Nutrition Posters&lt;br&gt;Electrostatic Sprayer &amp; Bioesque&lt;br&gt;Site Supervisor Development training&lt;br&gt;Family Service Worker Development Training&lt;br&gt;CPR Training&lt;br&gt;School Readiness Sub-Committee Meeting&lt;br&gt;Sanitation</td>
</tr>
<tr>
<td>Objectives</td>
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<tr>
<td><strong>Inclusion &amp; Wellness</strong></td>
<td>Inclusion Specialists</td>
<td>August 2023-</td>
<td>ASQ-3 Questionnaire</td>
<td>Classroom Expectations</td>
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<tr>
<td>Support parents and teaching staff by training and implementing the</td>
<td>Family Service Workers</td>
<td>June 2024</td>
<td>Implement Teaching Pyramid</td>
<td>ASQ-3 &amp; ASQ: SE-2 Trainings</td>
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<tr>
<td>Screening Ages and Stages Questionnaires (ASQ-3 &amp; ASQ: SE-2)</td>
<td>Site Supervisors</td>
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<td>ASQ-SE-2 Questionnaire</td>
<td>Using Visuals in the Classroom Training-ADD</td>
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<tr>
<td>to help identify children at risk for developmental/language delay who</td>
<td>Teaching Staff</td>
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<td>Teacher Support Planning Sheet</td>
<td>Using the Solution Kit Training-ADD</td>
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<tr>
<td>should be referred for further assessments by LEA. ASQ-3 &amp; ASQ: SE-2 will</td>
<td>CAS-Family Wellness</td>
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<td>Family Wellness Screening</td>
<td>Very Important Parent (VIP) Meetings</td>
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<td>be used to identify children who are on schedule and children who do not</td>
<td>Family Service Workers</td>
<td></td>
<td>Behavior Incident Report (BIR)</td>
<td>ASQs Presentations</td>
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<tr>
<td>meet the referral criteria, but scores are in the monitor areas of the</td>
<td>Site Supervisors</td>
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<td>Intra-agency Referral</td>
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<tr>
<td>ASQ-3 &amp; ASQ: SE-2.</td>
<td>Teaching Staff</td>
<td></td>
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<td>Predictable, Consistent Routines</td>
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<tr>
<td>Family Wellness will strengthen relationships between teacher and</td>
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<td></td>
<td>Pyramid Model Positive Behavior Support Training</td>
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<tr>
<td>parent by implementing strategies to enhance/support social and</td>
<td></td>
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<td></td>
<td>Behavior Incident Report (BIR) Training</td>
</tr>
<tr>
<td>emotional development for children with challenging behaviors. Family</td>
<td></td>
<td></td>
<td></td>
<td>Strategies for Dealing with Physical Aggression</td>
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<tr>
<td>wellness will support staff by providing new training that supports</td>
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<td></td>
<td>Teacher Support Planning Sheet Training</td>
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<tr>
<td>dealing with challenging behaviors, physical aggression, and trauma-</td>
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<td>Trauma-Informed Care</td>
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<td>informed care.</td>
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<td>School Readiness Sub-Committee Meeting</td>
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<tr>
<td><strong>Data Analysis</strong></td>
<td>Data Analyst</td>
<td>December 2023-</td>
<td>Child reports</td>
<td>How to enter DRDP into Child Plus</td>
</tr>
<tr>
<td>Data Analyst will support Program Goals by providing aggregated DRDP</td>
<td></td>
<td>March 2024</td>
<td>Group reports</td>
<td>Download reports from Child Plus</td>
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<tr>
<td>reports at Domain and Measure level. The Data Analyst will provide</td>
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<td>May 2024</td>
<td>Administration reports</td>
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<tr>
<td>ELD-specific program reports, as well as IEP/IFSP DRDP program reports</td>
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<td>three times per year.</td>
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486
<table>
<thead>
<tr>
<th>Resources:</th>
<th>Data Aggregation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Head Start Early Learning Outcomes Framework</td>
<td>• DRDP (2015) A Developmental Continuum from Early Infancy to Kindergarten Entry</td>
</tr>
<tr>
<td>• California Infant/Toddler Learning &amp; Development Foundations</td>
<td>• CLASS</td>
</tr>
<tr>
<td>• California Infant/Toddler Curriculum Framework</td>
<td>• ITERS/ECERS</td>
</tr>
<tr>
<td>• California Preschool Curriculum Framework</td>
<td>• HOVRS</td>
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<tr>
<td>• California Preschool Learning Foundations</td>
<td>• My Teachstone</td>
</tr>
<tr>
<td>• Parent, Family, and Community Engagement Framework</td>
<td>• Curriculum Fidelity</td>
</tr>
<tr>
<td>• Early Head Start/Head Start School Readiness Goals</td>
<td></td>
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<tr>
<th>Professional Development:</th>
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<tbody>
<tr>
<td>Training Opportunities</td>
</tr>
<tr>
<td>• California's Early Learning Development Systems.</td>
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<tr>
<td>• DRDP (2015)</td>
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<tr>
<td>• CLASS</td>
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<tr>
<td>• ITERS/ECERS</td>
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<tr>
<td>• Creative Curriculum Systems and Fidelity</td>
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<tr>
<td>• Partners for Healthy Babies</td>
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<tr>
<td>• Program for Infant/Toddlers Care</td>
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<tr>
<td>• Pyramid Model Positive Behavior Support</td>
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<tr>
<td>• MMCI</td>
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</tbody>
</table>
The following representatives analyzed, planned, reviewed, and shared their recommendations for the development of the Early Head Start & Head Start School Readiness Goals:

<table>
<thead>
<tr>
<th>Administration Team for Head Start and State Child Development Division:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Director:</strong> Yolanda Gonzales</td>
</tr>
<tr>
<td><strong>Assistant Director of Program:</strong> Jerry Meade</td>
</tr>
<tr>
<td><strong>Assistant Director:</strong> Gloria Barbero</td>
</tr>
<tr>
<td><strong>Finance Administrator:</strong> Louis Rodriguez</td>
</tr>
<tr>
<td><strong>Program Administrator:</strong> Letisha Brooks</td>
</tr>
<tr>
<td><strong>Quality Assurance Administrator:</strong> Sylvia Ortega</td>
</tr>
<tr>
<td><strong>Partnership Administrator:</strong> Esperanza Contreras</td>
</tr>
<tr>
<td><strong>Program Design and Management Administrator:</strong> Robert Espinosa</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Data Analyst</th>
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<tbody>
<tr>
<td>Chase Rangel</td>
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<table>
<thead>
<tr>
<th>Program Governance Coordinator:</th>
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<tbody>
<tr>
<td>Lisa Gonzales</td>
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<table>
<thead>
<tr>
<th>Early Childhood Specialist, California TTA Center</th>
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<tbody>
<tr>
<td>Mavy Moreno</td>
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<tr>
<th>Program Managers:</th>
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<tbody>
<tr>
<td>MaryAnn Mooney, Luz Adams, Rosa Del Toro, Janey Felsoci</td>
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<tr>
<th>Education Team:</th>
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<tbody>
<tr>
<td><strong>Education Manager:</strong> Rashi Strother</td>
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<tr>
<td><strong>Education Manager:</strong> Cynthia Rodriguez</td>
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<tr>
<td><strong>Curriculum Specialist:</strong> Nelly Mendoza, Teresa Lara</td>
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<tr>
<td><strong>Partnership Program Manager:</strong> Rosita Curry</td>
</tr>
<tr>
<td><strong>Home Based Supervisor:</strong> Mary Lopez</td>
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<tr>
<td><strong>Family Engagement Specialist/Home Based Supervisor:</strong> Nicole Nino</td>
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<tr>
<td><strong>Partnership Program Coordinator:</strong> Nicole Callahan</td>
</tr>
<tr>
<td><strong>Mentor Coaches:</strong> Melissa DeWitt, Pamala Roberts, Regina Hines, Tomasa Jara, Alicia Gamino, Rachel Leckkirk,</td>
</tr>
</tbody>
</table>
**Content Area Specialists: Inclusion, Nutrition, Health, Wellness, Family Engagement**

**Family Engagement and Inclusion Manager:** Maria Guadian  
**Content Area Specialists-Health:** Laura Gonzalez, Paulino Cruz, Rayjean Stone, Angel Perez, Maria (Maridel) Pinano  
**Content Area Specialists-Inclusion:** Delores Patricio, Shirley Park, Susie Martinez, Kariana Sotelo, Denise Cooper  
**Content Area Specialists-Wellness:** Andralette Wilson, Edna Quinones, Lorena Ortiz Ibarra  
**Content Area Specialists-Nutrition:** Lupe Villasana, Desiree Jackson, Valerie Caffese  
**Content Area Specialists- Family Engagement:** Leah Green, Elena Garcia, Shevada Dove

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**Policy Council Executive Board:**

**Chairperson:** Ruby Cruz (Heritage Child Development Center)  
**Vice-Chairperson:** Andrea Flores (San Joaquin Home Base)  
**Secretary:** Susana Barrios (Sunrise Villa Child Development Center)  
**Treasurer:** Pablo Reyes (Sterling Child Development Center)  
**Parliamentarian:** Monique McWilliams (Sterling Child Development Center)

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**Policy Council School Readiness Sub-Committee**

**Susana Barrios** (Sunrise Villa Child Development Center)  
**Ruby Cruz** (Heritage Child Development Center)  
**Sarita Little** (California City Child Development Center)  
**Gabriel Rios** (Taft Child Development Center)  
**Jennifer Wilson** (Kern Home Base)
MEMORANDUM

To: Board of Directors

From: Lisa McGranahan, Director of Human Resources

Date: June 28, 2023

Subject: Agenda Item V(g): Selection of Insurance Broker – Lisa McGranahan, Director of Human Resources — Action Item

Background
In 2021, after engaging in the RFP process, CAPK changed insurance brokers for all lines of service, health benefits, property and casualty, and worker’s compensation. Since that time, we have struggled, particularly with the medical benefits, in receiving timely notification of issues, engaging mitigation and as a result, faced an unfavorable and negatively impacting renewal for 2023. Since enduring that challenging renewal, staff were directed by the Benefits Ad Hoc Committee to engage in due diligence and present more favorable options for the future. In that exhaustive search, staff encountered a PACE pool option, where CAPK could, with approved membership, become a member of this medical insurance pool to better mitigate high claims and losses.

In a presentation to the Benefits Ad Hoc committee on June 15, 2023, staff demonstrated several options including the insurance pool option which netted out to be cost-effective, affordable for staff, and benefit-option rich. Staff highlighted Keenan and Associates as the managing broker of the PACE pool for which we have been approved to join. Unanimously, the Benefits Ad Hoc Committee directed staff to bring a Change of Broker recommendation to the Board for approval and subsequent execution. The requisite notice to our current broker, Bolton, is thirty (30) days. The selection of the Health Plan and open enrollment decisions will be made later and will come before the Board. This recommended action will only change our broker. Also, this change of broker only covers our employees’ health-related plans. Bolton is our broker for other business lines which would continue.

Recommendation
Staff and the Benefits Ad Hoc committee recommend the Board of Directors approve the selection of Keenan and Associates as the insurance broker for health benefits only and begin the transition to the PACE pool insurance plans.
MEMORANDUM

To: Board of Directors

From: Freddy Hernandez, Director of Youth and Community Services

Date: June 28, 2023

Subject: Agenda Item V(h): Bakersfield Kern Regional Homeless Collaborative One-Time State Funding for Homeless Housing, Assistance and Prevention Program (HHAP 3) Contract for Services Rural Drop-in Center – Action Item

In June 2023, the agency was successfully awarded an offer to contract for services through the Bakersfield Kern Regional Homeless Collaborative as part of the one-time state funding for Homeless Housing Assistance and Prevention program Round 3 (HHAP-3) to provide case management services to individuals experiencing homelessness in the East Kern area of the County as part of a Rural Drop-in Center program design.

The contract will support housing navigators/outreach specialists that will be co-located at the East Kern Family Resource Center. Staff will conduct a brief in-take survey through the Coordinated Entry System (CES) program to understand the needs of the client, and as part of the supportive services model, the walk-in clients will also receive resources to other CAPK and community-based services. This includes transportation services from East Kern to the City for medical or social services appointments, such as with the Department of Motor Vehicle, Social Security Insurance office, and the Department of Human Services, for example, and client incentives.

The Rural Drop-in Center program includes 4 key elements:

- Distribution of essential items
- Enrollment support in social services
- Direct linkages to CAPK services
- Community outreach

The term is May 1, 2023 to June 30, 2026 with a contract amount of $300,000.00. CAPK estimates that between 45 and 55 households will be housed during the project term.

Recommendation:
Staff recommends the Board of Directors authorize the Chief Executive Officer to execute the Bakersfield Kern Regional Homeless Collaborative One-Time State Funding for Homeless Housing, Assistance and Prevention Program (HHAP 3) Contract for Services for the East Kern Family Resource Center.

Attachment:
Bakersfield-Kern Regional Homeless Collaborative - Community Action Partnership of Kern County Subrecipient Agreement for Homeless Housing Assistance and Prevention Program Round 3 Grant
AGREEMENT NO. 2023-302

COMMUNITY ACTION PARTNERSHIP OF KERN COUNTY SUBRECIPIENT AGREEMENT
FOR HOMELESS HOUSING ASSISTANCE AND PREVENTION PROGRAM ROUND 3
GRANT

THIS AGREEMENT is made and entered into on __05/01/2023_____, by and between the BAKERSFIELD-KERN REGIONAL HOMELESS COLLABORATIVE, a California non-profit, public-benefit corporation ("BKRHC" herein) and Community Action Partnership of Kern, a California non-profit, public-benefit corporation ("CORPORATION" herein).

RECITALS

WHEREAS, California Governor Gavin Newsom and the members of the California Legislature have recognized the urgent and immediate need for funding at the local level to combat homelessness; and

WHEREAS, the Governor and Legislature have provided funding to local governments under the Homeless Housing Assistance and Prevention program as part of AB 101(Chapter 159); and

WHEREAS, the BKRHC has developed a homelessness plan and undertaken multiple efforts at the local level to combat homelessness; and

WHEREAS, BKRHC finds that the health and safety of unsheltered persons in Kern County is threatened by a lack of shelter; and

WHEREAS, the State of California has granted Homeless Housing Assistance and Prevention Round 3 (HHAP- 3) funds to BKRHC and BKRHC desires to grant HHAP- 3 funds to CORPORATION to be expended on emergency shelter case management for permanent housing solutions; and

WHEREAS, BKRHC shall not be obligated to disburse, or pay to, CORPORATION or any third party, any funds until and after BKRHC receives Grant funds from the state government; and

WHEREAS, CORPORATION has requested assistance in providing emergency shelter case management for permanent housing solutions; and
WHEREAS, BKRHC desires to assist CORPORATION by making grant funding available for a portion of the costs associated with certain activities as are permitted for homeless citizens in the Bakersfield area; and

WHEREAS, CORPORATION represents that CORPORATION is experienced and well qualified in the field of homeless services.

NOW, THEREFORE, incorporating the foregoing recitals herein, BKRHC and CORPORATION mutually agree as follows:

1. HHAP- 3 FUNDING TERMS. CORPORATION and its subcontractors must abide by all terms of the HHAP- 3 State of California Standard Agreement, which is attached hereto and incorporated by reference herein as Exhibit “A”.

2. SCOPE OF WORK. The scope of the grant is set forth in Exhibit “B” which is attached hereto and incorporated herein by reference as if set forth in full.

3. COMPENSATION. It is expressly agreed and understood that the total amount to be paid by BKRHC under this Agreement shall not exceed THREE HUNDRED THOUSAND DOLLARS AND ZERO CENTS ($300,000.00). The Compensation shall be the total compensation under this Agreement including, but not limited to, all out-of-pocket costs and taxes. Such grant shall only be used to pay for operating costs provided as set forth in Exhibit “B” and in accordance with this Agreement.

3.1. Disbursement of Funds. BKRHC shall not be obligated to disburse, or pay to, CORPORATION or any third party, any funds until and after BKRHC receives HHAP- 3 funds from the state government. If BKRHC does not receive such funds, BKRHC, at its option, may terminate or suspend this Agreement without any liability to CORPORATION or its subrecipients until BKRHC receives such funds. CORPORATION shall not be entitled to any damages from BKRHC if BKRHC refuses to disburse funds until BKRHC receives funds, even if CORPORATION or any third party has detrimentally relied upon this Agreement.

3.1.1. CORPORATION shall conform to the “time frame” as set forth in Exhibit “B,” attached hereto and incorporated herein by reference. CORPORATION shall pay for any and all costs greater than THREE HUNDRED THOUSAND DOLLARS AND ZERO CENTS ($300,000.00).

3.2. Eligible Claims for Payment. BKRHC agrees to pay eligible claims for payment to CORPORATION within thirty (30) days after BKRHC receives an eligible claim for payment as set forth herein, and a properly designated CORPORATION official certifies the claim. All invoices must be submitted monthly and reported quarterly.
3.3. **Method of Payment.** BKRHC agrees to pay “claims for payment” directly to CORPORATION within 30 days after BKRHC receives a satisfactory “claim for payment.” CORPORATION shall properly itemize and document claims for payment to show clearly the items, tasks, or services for which CORPORATION claims reimbursement, as well as describing to which of the Activities the payment is related. CORPORATION shall also describe the basis for computation: cost per hour, cost per weight, cost per task, or other measurement as BKRHC may specify. BKRHC may review the claim for completeness and accuracy and may refuse to pay any claim until explained to BKRHC’s satisfaction.

3.4. **Term.** The term of this Agreement shall begin May 1, 2023 and end June 30, 2026. All funds must be expended by June 30, 2026.

4. **CORPORATION’S OBLIGATIONS.** In addition to the terms stated herein, CORPORATION shall comply with the following Federal and State laws and regulations:

4.1. **Laws and Regulations**

4.1.1. **Federal.** CORPORATION shall comply with all provisions of Federal law applicable to this Agreement.

4.1.2. **California.** CORPORATION shall comply with all provisions of California law applicable to this Agreement.

4.1.3. **Independent Contractor.** CORPORATION understands and agrees that it is an “independent contractor” with respect to the services to be performed under this Agreement. CORPORATION is not an agent or employee of BKRHC for any purpose and is not entitled to any of the benefits provided by BKRHC to its employees. BKRHC shall be exempt from payment of all Unemployment Compensation, FICA, retirement, life and/or medical insurance and Workers’ Compensation Insurance. This agreement shall not be construed as forming a partnership or any other association with CORPORATION other than that of an independent contractor.

4.1.4. **Indemnification.** CORPORATION shall indemnify, defend, and hold harmless BKRHC, its officers, agents, and employees against any and all liability, claims, actions, causes of action or demands whatsoever against them, or any of them, before administrative or judicial tribunals of any kind whatsoever, arising out of, connected with, or caused by CORPORATION, CORPORATION’s employees, agents, independent contractors, companies, or subcontractors in the performance of, or in any way arising from, the terms and provisions of this
Agreement whether or not caused in part by a party indemnified hereunder, except for BKRHC sole active negligence or willful misconduct.

4.1.5. **Insurance.** In addition to any other insurance or bond required under this Agreement, CORPORATION shall procure and maintain for the duration of this Agreement the following types and limits of insurance ("basic insurance requirements" herein):

4.1.5.1. **Automobile liability insurance,** providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:

4.1.5.1.1. Provide coverage for owned, non-owned and hired autos.

4.1.5.2. **Broad form commercial general liability insurance,** unless otherwise approved by the BKRHC Executive Director, providing coverage on an occurrence basis for bodily injury, including death, of one or more persons, property damage and personal injury, with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall:

4.1.5.2.1. Provide contractual liability coverage for the terms of this Agreement.

4.1.5.2.2. Provide products and completed operations coverage.

4.1.5.2.3. Contain an additional insured endorsement in favor of BKRHC, its mayor, council, officers, agents, employees and volunteers.

4.1.5.2.4. All policies shall be written on a first-dollar coverage basis or contain a deductible provision. Subject to advance approval by the BKRHC, CONTRACTOR may utilize a Self-Insured Retention provided that the policy shall not contain language, whether added by endorsement or contained in the Policy Conditions, that prohibits satisfaction of any Self-Insured provision or requirement by anyone other than the Named Insured, or by any means including other insurance or which is intended to defeat the intent or protection of an Additional Insured.

4.1.5.3. **Workers’ compensation insurance** with statutory limits and employer's liability insurance with limits of not less than One Million Dollars ($1,000,000) per occurrence; and the policy shall contain a waiver of subrogation
in favor of BKRHC, its mayor, council, officers, agents, employees, and designated volunteers.

4.1.5.4. Except for professional liability, all policies required of CORPORATION shall be primary insurance as to BKRHC, its mayor, council, officers, agents, employees or designated volunteers, and any insurance or self-insurance maintained by BKRHC shall be excess of CORPORATION’s insurance and shall not contribute with it.

4.1.5.5. Except for workers’ compensation, insurance is to be placed with insurers with a Bests’ rating as approved by BKRHC’s Executive Director, but in no event less than A-: VII. Any deductibles, self-insurance retentions or insurance in lesser amounts, or lack of certain types of insurance otherwise required by this Agreement, or insurance rated below Bests’ A-: VII, must be declared prior to execution of this Agreement and approved by BKRHC in writing.

4.1.5.6. Unless otherwise approved by BKRHC’s Executive Director, all policies shall contain an endorsement providing BKRHC with thirty (30) days written notice of cancellation or material change in policy language or terms. All policies shall provide that there shall be continuing liability thereon, notwithstanding any recovery on any policy. Copies of policies shall be delivered to BKRHC on demand.

4.1.5.7. The insurance required hereunder shall be maintained at all times during the term of this Agreement or any extension thereof.

4.1.5.8. CORPORATION shall furnish BKRHC’s Executive Director with a certificate of insurance and required endorsements evidencing the insurance required. BKRHC may withdraw its offer of contract or cancel this contract if certificates of insurance and endorsements required have not been provided prior to the execution of this Agreement.

4.1.5.9. Full compensation for all premiums which the CORPORATION is required to pay on all the insurance described herein shall be considered as included in the prices paid for the various items of work to be performed under the Agreement, and no additional allowance will be made therefore or for additional premiums which may be required by extensions of the policies of insurance.

4.1.5.10. It is further understood and agreed by CORPORATION that its liability to BKRHC shall not in any way be limited to or affected by the amount of insurance obtained and carried by CORPORATION in connection with this Agreement.
4.1.5.11. Unless otherwise approved by BKRHC, if any part of the work under this Agreement is subcontracted, the “basic insurance requirements” set forth above shall be provided by, or on behalf of, all subcontractors even if BKRHC has approved lesser insurance requirements for CORPORATION.

5. **ADMINISTRATIVE REQUIREMENTS.**

5.1. **Financial Management.**

5.1.1. **Accounting Standards.** CORPORATION agrees to utilize adequate internal controls and maintain necessary source documentation for all costs incurred.

5.1.2. **Documentation and Record Keeping.**

5.1.2.1. **Records to be Maintained.** CORPORATION shall maintain all records required by the State regulations specified in “Exhibit A” and “Exhibit B” that are pertinent to the activities to be funded under this Agreement. Such records include, but are not limited to:

5.1.2.2. **Retention.** CORPORATION shall retain all records pertinent to expenditures incurred under this Agreement for a period of five (5) years after the expiration of this Agreement. Notwithstanding the above, if there is litigation, claims, audits, negotiations, or other actions that involve any of the records cited and that have started before the expiration of the five-year period, then such records must be retained until completion of the actions and resolution of all issues, or the expiration of the three-year period, whichever occurs later.

5.1.2.3. **Client Data.** CORPORATION shall maintain client data demonstrating client eligibility for services provided. Such information shall include, but not be limited to, client name, address, income level, or other basis for determining eligibility, and description of service provided. Such information shall be submitted to BKRHC or its designees for review on a quarterly basis using the attached Homeless Housing Assistance and Prevention-3 Report or alternative form approved by BKRHC (Exhibit C).

5.1.2.4. **HMIS Reporting Requirements.** CORPORATION will collect and evaluate data to be entered into the Homeless Management Information System (HMIS). The data will be entered into a local HMIS using HUD’s and California Interagency Council on Homelessness (Cal ICH) standards for participation.

5.1.2.5. **Proposed Outcomes Reporting.** CORPORATION will report proposed outcomes as stated in Exhibit B “Description.” Outcome reports will be...
submitted monthly as part of CORPORATION’s claim for payment and will be required for satisfactory claim for payment as described in section 3.3.

5.1.2.6. **Property Records.** CORPORATION shall accept title to and be responsible for the maintenance and operation of the improvements made under this Agreement. CORPORATION shall maintain real property inventory records which clearly identify properties purchased, improved or sold.

5.1.2.7. **Close-Outs.** CORPORATION’s obligation to BKRHC shall not end until all close-out requirements are completed. Activities during this close-out period shall include, but are not limited to, making final payments, disposing of program assets (including the return of all unused materials, equipment, unspent cash advances, program income balances, and accounts receivable to BKRHC), and determining the custodianship of records.

5.1.2.8. **Audits and Inspections.** All CORPORATION records with respect to any matters covered by this Agreement shall be made available to BKRHC, its designee or the State Government, at any time during normal business hours, as often as BKRHC deems necessary, to audit, examine, and make excerpts or transcripts of all relevant data. Any deficiencies noted in audit reports must be fully cleared by the CORPORATION within 30 days after receipt by it. Failure of CORPORATION to comply with the above audit requirements will constitute a violation of this Agreement and may result in the withholding of future payments. CORPORATION hereby agrees to have an annual audit conducted in accordance with current BKRHC policies concerning subrecipient audits.

5.2. **Personnel and Participant Conditions**

5.2.1. **Nondiscrimination Requirements.** During the performance of this Agreement, Contractor and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex (gender), sexual orientation, gender identity, gender expression, race, color, ancestry, religion, creed, national origin (including language use restriction), pregnancy, physical disability (including HIV and AIDS), mental disability, medical condition (cancer/genetic characteristics), age (over 40), genetic information, marital status, military and veteran status, and denial of medical and family care leave or pregnancy disability leave. Contractors and subcontractors shall ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Contractor or subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Government Code section 12990 (a-f) et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, section 7285 et seq.). The applicable
regulations of the Fair Employment and Housing Commission implementing Government Code section 12990 (a-f), set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Contractor and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement.

5.2.2 Conflict of Interest. All participants are subject to State and Federal conflict of interest laws. Failure to comply with these laws, including business and financial disclosure provisions, will result in any subsequent contract being declared void. Other legal action may also be taken. Applicable statutes include, but are not limited to, Government Code section 1090 and Public Contract Code, sections 10410 and 10411, for State conflict of interest requirements.

5.2.3 Drug Free Workplace Certification. Certification of Compliance: By signing this Agreement, Contractor, and its subcontractors, hereby certify, under penalty of perjury under the laws of State of California, compliance with the requirements of the Drug-Free Workplace Act of 1990 (Government Code 8350 et seq.) See Exhibit “D”.

5.2.4 Child Support Compliance Act. For any Contract Agreement in excess of $100,000, the Contractor acknowledges in accordance with Public Contract Code 7110, that:

The Contractor recognizes the importance of child and family support obligations and shall fully comply with all applicable state and federal laws relating to child and family support enforcement, including, but not limited to, disclosure of information and compliance with earnings assignment orders, as provided in Chapter 8 (commencing with section 5200) of Part 5 of Division 9 of the Family Code; and

The Contractor, to the best of its knowledge is fully complying with the earnings assignment orders of all employees and is providing the names of all new employees to the New Hire Registry maintained by the California Employment Development Department.

5.3. Environmental Conditions.

5.3.1. Environmental Considerations. BKRHC and CORPORATION want to assure that the policies of the California Environmental Quality Act of 1970 (CEQA), as amended, are most effectively implemented, BKRHC shall comply with the CEQA review procedures (Title 14, Section 15000 et seq. of the California
Administrative Code) in connection with this Project as rapidly as possible. Project delay occasioned by delay in the CEQA review procedures shall extend the estimated work completion period.

6. **COMPLIANCE WITH STATE AND FEDERAL LAWS, RULES, GUIDELINES AND REGULATIONS.** The CONTRACTOR agrees to comply with all State and Federal laws, rules and regulations that pertain to construction, health and safety, labor, fair employment practices, environmental protection, equal opportunity, fair housing, and all other matters applicable and/or related to the HHAP program, the CONTRACTOR, its Subcontractors, and all eligible activities.

CONTRACTOR shall also be responsible for obtaining any and all permits, licenses, and approvals required for performing any activities under this Agreement, including those necessary to perform design, construction, or operation and maintenance of the activities. CONTRACTOR shall be responsible for observing and complying with any applicable federal, state, and local laws, rules or regulations affecting any such work, specifically those including, but not limited to, environmental protection, procurement, and safety laws, rules, regulations, and ordinances. CONTRACTOR shall provide copies of permits and approvals to BKRHC upon request.

7. **BKRHC’S OBLIGATIONS.**

7.1. **Copy of Regulations and Statutes.** BKRHC will make available to CORPORATION a copy of any regulation BKRHC enacts to facilitate administration of said Program.

8. **BKRHC’S REMEDIES.** If CORPORATION fails to materially comply with the terms of this Agreement, BKRHC, at its option, may suspend or terminate this Agreement and may demand CORPORATION return all funds granted to CORPORATION pursuant to this Agreement. The remedies provided in this Agreement are cumulative and are in addition to any other remedies in law or equity which may be available to BKRHC. The election of one or more remedies shall not bar the use of other remedies unless the circumstances made the remedies incompatible.

8.1. **Concurrent Remedy.** No right or remedy herein conferred on or reserved to BKRHC is exclusive of any other right or remedy herein or by law or equity provided or permitted; but each shall be cumulative of every other right or remedy given hereunder or now or hereafter existing by law or in equity or by statute or otherwise,

8.2. and may be enforced concurrently therewith or from time to time.
9. MISCELLANEOUS.

9.1. No Waiver of Default. The failure of any party to enforce against another party any provision of this Agreement shall not constitute a waiver of that party's right to enforce such a provision at a later time and shall not serve to vary the terms of this Agreement.

9.2. Binding Effect. The rights and obligations of this Agreement shall inure to the benefit of, and be binding upon, the parties to the Agreement and their heirs, administrators, executors, personal representatives, successors and assigns.

9.3. Merger and Modification. All prior agreements between the parties are incorporated in this Agreement which constitutes the entire Agreement. Its terms are intended by the parties as a final expression of their agreement with respect to such terms as are included herein and may not be contradicted by evidence of any prior agreement or contemporaneous oral agreement. The parties further intend this Agreement constitutes the complete and exclusive statement of its terms and no extrinsic evidence whatsoever may be introduced in any judicial or arbitration proceeding involving this Agreement. This Agreement may be modified only in a writing approved by BKRHC and signed by all the parties.

9.4. Corporate Authority. Each individual signing this Agreement on behalf of entities represents and warrants that they are, respectively, duly authorized to sign on behalf of the entities and to bind the entities fully to each and all of the obligations set forth in this Agreement.

9.5. Governing Law. The laws of the State of California will govern the validity of this Agreement, its interpretation and performance. Any litigation arising in any way from this Agreement shall be brought in Kern County, California.

9.6. Termination of Agreement. BKRHC reserves the right to terminate this AGREEMENT upon giving CORPORATION notice of intention to terminate at least 30 days prior to the effective date of the termination. BKRHC shall only convey to CORPORATION funds for work done prior to the effective date of termination. This Agreement may be terminated by any party upon 30 days written notice, served by mail or personal service, to all other parties.

9.7. Notices. All notices relative to this Agreement shall be given in writing and shall be personally served or sent by certified or registered mail and be effective upon actual personal service or depositing in the United States mail. The parties shall be addressed as follows, or at any other address designated by notice:
If directed to BKRHC, addressed to:

Executive Director
Bakersfield Kern Regional Homeless Collaborative
Physical address: 1115 Truxtun Ave. 5th Floor
Bakersfield, CA 93301
Mailing Address: 1900 E. Brundage Lane
Bakersfield, CA 93307

If directed to CORPORATION, addressed to:

Chief Executive Director
Community Action Partnership of Kern
5005 Business Park North
Bakersfield, CA 93301

9.8. **Execution.** This Agreement is effective upon execution. It is the product of negotiation and all parties are equally responsible for authorship of this Agreement. Section 1654 of the California Civil Code shall not apply to the interpretation of this Agreement.

9.9. **Assignment.** Neither this Agreement nor any rights, interests, duties, liabilities, obligations or responsibilities arising out of, concerning or related in any way to this Agreement (including, but not limited to, accounts, actions, causes of action, claims, damages, demands, liabilities, losses, obligations, or reckonings of any kind or nature whatsoever, for compensatory or exemplary and punitive damages, or declaratory, equitable or injunctive relief, whether based on contract, equity, tort or other theories of recovery provided for by the common or statutory law) may be assigned or transferred by any party. Any such assignment is prohibited, and shall be unenforceable and otherwise null and void without the need for further action by the non-assigning party or parties.

9.10. **Negation of Partnership.** BKRHC shall not become or be deemed a partner or joint venture with CORPORATION or associate in any such relationship with CORPORATION by reason of the provisions of this Agreement. CORPORATION shall not for any purpose be considered an agent, officer or employee of BKRHC.

9.11. **Conflicts of Interest.** CORPORATION stipulates that corporately, or individually, the firm, its employees and sub-consultants have no financial interest in either the success or failure of any project which is dependent upon the result of the work prepared pursuant to this Agreement and funds provided for herein (California Government Code Section 1090).
9.12  Tax Numbers.

"CORPORATION's" Federal Tax Identification No. 95-2402760.  
"CORPORATION" is a corporation?   Yes X No _____.  
(Please check one.)

9.13  HMIS Reporting Requirements.  CORPORATION will collect and evaluate data to be entered into the Homeless Management Information System (HMIS). The data will be entered into a local HMIS using HUD's and California Homeless Coordinating and Financing Council standards for participation.

9.13.1 Reporting Timeframe  CORPORATION will submit invoices monthly and quarterly reports to BKRHC, with the first report due August 30, 2023, then quarterly thereafter until October 1, 2026, or until funds are exhausted.

(The remainder of this page intentionally left blank)
IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed the day and year first-above written.

“BKRHC”

BAKERSFIELD-KERN REGIONAL HOMELESS COLLABORATIVE

By: __________________________
RICK RAMOS
INTERIM EXECUTIVE DIRECTOR

“CORPORATION”
COMMUNITY ACTION PARTNERSHIP OF KERN

By: __________________________
JEREMY T. TOBIAS
CHIEF EXECUTIVE DIRECTOR
EXHIBIT "A"
HHAP- 3 STANDARD AGREEMENT

Homeless Housing, Assistance and Prevention Program Round 3 (HHAP3) Standard Agreement with Bakersfield Kern Regional Homeless Collaborative.
EXHIBIT "B"

HOMELESS HOUSING ASSISTANCE AND PREVENTION ROUND 2 GRANT PROGRAM
Community Action Partnership of Kern

Purpose of Project

Homeless services are a crucial extension of our services. Currently, EKFRC sees at least 60 homeless individuals and an average of 5-10 people at risk of homelessness each month.

The project will be housed within CAPK's East Kern Family Resource Center (EKFRC). Currently, Mojave's EKFRC provides the First 5 case management; emergency food assistance; utility assistance; Volunteer Income Tax Assistance (VITA); and Court Mandated Parenting Classes.

1 FTE CES Housing Navigators and .5 of a Site Supervisor will support the implementation of the program. Training will include enrollment/participation in CoC University, and HMIS and CES training. Staff will be fully trained within 3 months of the start date.

Description

The Rural Drop-in Center program includes 4 key elements: 1.) distribution of essential items, 2.) enrollment support in social services, 3.) direct linkages to CAPK services and 4.) community outreach. Clients that walk-in will be greeted by the Housing Navigator who will conduct a brief in-take survey through CES to understand the needs of the client.

1. Distribution of Essential Items

The Rural Drop-in Center will complement many of the services in place. Grant funds will allow our FRC to diversify the giveaways presented to clients. In addition to emergency food assistance, staff will also distribute the following items to clients that are housing insecure: • Clothing • Sleeping bags/tents • Blankets • Diapers/wipes • First aid kits 7 • Socks/shoes 2.

Enrollment Support in Social Services CAPK's work experience with the homeless population provides familiarity with common barriers to accessing care. Two of them are lack of documentation, i.e., a birth certificate and/or an identification card. EKFRC will provide hands-on support with preparing these applications and
scheduling appointments at the Department of Motor Vehicle and Kern County’s Hall of Records. Staff will offer transportation to these appointments. Once these documents are acquired, efforts will focus on providing education/referrals to services offered by the Department of Health and Human Services (DHHS). Staff will provide support with collecting the proper documentation to apply to Medical and CalFresh Healthy Living. An existing partnership with DHHS will be leveraged to ensure that these applications are successful and processed in a timely manner.

CAPK’s VITA team visits the site monthly. During these visits, clients will receive no-cost tax preparation, e-filing services, and education on banking opportunities.

Similarly, clients will also have access to utility assistance and weatherization services. Staff noted above are trained to provide both services. Utility assistance provides payment support with electronic, gas, propone, and water bills. Among others, weatherization services include repairs/replacements of windows, appliances, and insulation.

**Eligible Expenses**

The total amount of HHAP-3 funds expended to meet these costs shall not exceed THREE HUNDRED THOUSAND DOLLARS AND ZERO CENTS ($300,000.00).

**Limitations**

CORPORATION shall not use HHAP-3 program funding to supplant existing funds for homeless housing, assistance, or prevention.

**Time frame**

All funds granted to Community Action Partnership of Kern shall be completely expended within the term of the Agreement, May 1, 2023 – April 30, 2026.

**Data Submission Requirements and Timeline:**

CORPORATION shall submit a quarterly report to BKRHC on forms provided by BKRHC, by August 30, 2023, and annually ever year thereafter with a final report due October 1, 2026, or until funds are exhausted. If the Contractor fails to provide such documentation, BKRHC may disencumber any portion of the amount authorized by this Agreement with a 14-day written notification.
Corporation will report on the following, as well as any additional information BKRHC deems appropriate or necessary:

(1) Data collection shall include, but not be limited to, information regarding individuals and families served, including demographic information, information regarding partnerships among entities or lack thereof, and participant and regional outcomes.

(2) An ongoing tracking of the specific uses and expenditures of any program funds broken out by eligible use stated in agreement, including the current status of those funds.

(3) The type of housing assistance provided, broken out by the number of individuals.

(4) Outcome data for individuals served through program funds, including the type of housing that an individual exited to, the percent of successful housing exits, and exit types for unsuccessful housing exits.

(5) The performance monitoring and accountability framework shall include clear metrics, which may include, but are not limited to, the following:

(a) The number of people served, and individual exits to permanent housing, as defined by the United States Department of Housing and Urban Development, from unsheltered environments and interim housing resulting from this funding.

(b) Racial equity, as defined by the council in consultation with representatives of state and local agencies, service providers, the Legislature, and other stakeholders.

(c) Any other metrics deemed appropriate by BKRHC.

The Contractor further agrees to retain all records for a minimum period of five (5) years after the termination of this Agreement.

Other Requirements

HMIS CORPORATION will collect and evaluate data to be entered into the Homeless Management Information System (HMIS). The data will be entered into a local HMIS using HUD’s standards for participation.
**Housing First**

Any housing-related activities funded with HHAP-3 funds must be in compliance or otherwise aligned with the Core Components of Housing First, pursuant to Welfare and Institution Code Section 8255(b).
Exhibit “C”
Homeless Housing Assistance and Prevention Round 3 Annual Report

This agreement shall terminate on June 30, 2026, or upon delivery of the HHAP-3 final report required by HSC § 50223(b), whichever is sooner, and all funds expended.

HHAP-3 Annual reporting is due on December 31 from 2022 through 2025, with the final report due October 1, 2026. The report will need to include Financials (Obligations and Expenditures).

Data reporting, performance metrics, project narrative, racial equity, partnerships, and budget modifications are to be noted, if there were any reallocations.
EXHIBIT “D”

DRUG FREE WORKPLACE CERTIFICATION

The undersigned certifies, to the best of his or her knowledge and belief, that: Corporation, representing the facility known as **Community Action Partnership of Kern** located at 5005 Business Park North, **Bakersfield CA 93301** will continue to provide a drug-free workplace by meeting all standards and requirements of the Code of Federal Regulations, Part 24, Subpart F as follows:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee’s workplace and specifying the actions that will be taken against employees for violation of such prohibition.

2. Establishing an ongoing drug-free awareness program to inform employees about:
   (a) The dangers of drug abuse in the workplace;
   (b) The grantee’s policy of maintaining a drug-free workplace;
   (c) Any available drug counseling, rehabilitation, and employee assistance programs; and
   (d) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1.

4. Notifying the employee in the statement required by paragraph 1 that, as a condition of employment under the grant, the employee will –
   (a) Abide by the terms of the statement; and
   (b) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction.

5. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph 4 (b) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant.
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is so convicted:
   (a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended: or
   (b) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency.

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5, and 6.

8. This certification meets the objectives and requirements of the United States Department of Housing and Urban Development (HUD).

______________________________
JEREMY TOBIAS
Chief Executive Officer
Community Action Partnership of Kern

Dated: __________
To: Budget and Finance  

5i  

From: Jerry Meade, Assistant Director - Program  

Date: June 28, 2023  

Subject: Agenda Item V(i): SJCOE Annual Contract Renewal – Action Item  

The Head Start and State Child Development Division is requesting approval from the Board of Directors to renew our contract with San Joaquin County Office of Education (SJCOE) for General Child Care and Development (CCTR) funds. This funding supports the blending of CCTR funding with Early Head Start (EHS) funds to provide center-based services for children of families needing childcare for 8 hours or longer in order to work, attend school, or job-training. The original contract and partnership with SJCOE began in September 2019.

This new agreement between San Joaquin County Office of Education and Community Action Partnership of Kern for the purpose of conducting activities of the General Child Care and Development program, (CCTR) is for the period of July 1, 2023, through June 30, 2024.

The amount of funding is $2,458,117. SJC Early Head Start is expecting to reach full enrollment and fully earn the contract in the new school year. With the approval from the board, contract development will continue with the amount identified above.

Recommendation  
Staff recommends the Board of Directors approve with resolution, the renewal of the San Joaquin County Office of Education contract for our SJC EHS program and authorized the Chief Executive Officer to execute the contract and any amendments throughout the duration of the contract term.

Attachment:  
SJCOE 2023-24 Contract
RESOLUTION # 2023-12

A Resolution of the Board of Directors of Community Action Partnership of Kern Approving the 2023-2024 San Joaquin County Office of Education Contract

The Board of Directors of Community Action Partnership of Kern, met on June 28, 2023, at a regularly scheduled meeting, at the CAPK Administrative Offices located at 5005 Business Park North, Bakersfield, CA 93309 and resolved as follows:

WHEREAS, Community Action Partnership of Kern (CAPK) is a private, non-profit 501(c)(3) corporation established as a result of the Economic Opportunity Act of 1964, and is the federally designated community action agency serving the low-income, elderly and disadvantaged residents of Kern County; and

WHEREAS, CAPK is charged with the responsibility of continuing the battle to alleviate poverty in Kern County by developing and implementing creative and innovative programs, and has adopted the philosophical position of “Helping People, Changing Lives’ in its quest to assist people in need, and families with minimal or no resources; and

WHEREAS, the San Joaquin County Office of Education has offered to renew our General Child Care Contract (CCTR) for the 2023 – 2024 fiscal year; and

WHEREAS, The Head Start and State Child Development Division is requesting to renew the contract for $2,458,117 to serve 144 children in San Joaquin County; and

WHEREAS, the San Joaquin County Office of Education requires that an authorized signatory be named for the funding contract; and

NOW, THEREFORE, be it resolved that the Board of Directors hereby authorize the Chief Executive Officer to act on behalf of the Board as CAPK’s representative signatory with regard to the San Joaquin County Office of Education contract and further amendments as required.

APPROVED by a majority vote of the Directors of Community Action Partnership of Kern, this 28th day of June 2023.

________________________________________________________________________

Fred Plane, Chair
CAPK Board of Directors

________________________________________________________________________

Date
COOPERATIVE AGREEMENT

This agreement, by and between the San Joaquin County Office of Education, hereinafter referred to as OFFICE, and Community Action Partnership Kern, hereinafter referred to as SUBCONTRACTOR, is for the purpose of conducting activities of the General Child Care and Development program (CCTR) during the period of **July 1, 2023 through June 30, 2024**. Funding to OFFICE is provided by the California Department of Social Services, hereinafter referred to as CDSS. Agreement and funding are contingent upon availability of funds.

All attachments referenced in this agreement are hereby incorporated in the agreement.

1. **Funding Authority**
   Funding for this contract is authorized under General Child Care and Development program – CCTR-3TBD.

2. **Maximum Reimbursable Amount (MRA)**
   SUBCONTRACTOR agrees to carry out those responsibilities assigned to it by this agreement for a maximum of **$2,458,117** of state contract funds.

   Maximum administrative rate is **8.5%** of allowable expenditures.

3. **Service Requirements**
   To be eligible to receive the maximum reimbursable amounts listed in section 2, SUBCONTRACTOR is required to earn **50,330.0** of net child days of enrollment (CDE) as specified in Attachment A, CDE Earnings Projection Worksheet, which is attached, and by the reference made part of this agreement. “Net” is defined as Total CDE earned less the CDE necessary to earn the family fees collected. Should CDSS provide a “Hold Harmless” period, earnings requirement will be adjusted accordingly.

   SUBCONTRACTOR is contracted to serve the total number of children for the minimum days of operation and sites stated therein, with any proposed changes approved by OFFICE.

4. **Reimbursement Rate**
   The rate at which SUBCONTRACTOR shall be reimbursed for each eligible net adjusted CDE is **$48.84**.

   The rate at which the collected family fees shall be earned is **$54.93**.

5. **Minimum Days of Operation (MDO)**
   SUBCONTRACTOR is required to operate the minimum number of days as specified in Attachment A which may not be less than **98% of 245**. Any changes to the approved MDO must be requested of and approved by OFFICE. Upon approval of any changes to MDO, notification will be provided to all affected families within 24 hours.

6. **Maximum Dollar Allocations**
   All dollar allocations in this agreement are maximum amounts. They may be reduced by OFFICE, if necessary, to match approved budgets, actual SUBCONTRACTOR earnings, minimum days of operation, and expenditures, or for failure to perform or meet standards or regulations. A review will be held after the submission of the
December invoice to determine if reductions to the funded amounts should be amended.

7. **Budget Revisions**

A budget revision from one category to another requires prior written approval from OFFICE if the sum involved exceeds 10% of the category to be increased or decreased or $50,000, whichever amount is smaller. Any budget change in equipment if $5,000 or more or construction/renovation if $7,500 or more, requires prior written approval from OFFICE and CDSS. Should prior CDSS approval be required, SUBCONTRACTOR must submit to OFFICE a description of the need for the purchase, three quotes for the purchase, the recommended vendor from the submitted quotes, and a completed CD2703 form. No purchase can occur until the approval from CDSS is received by OFFICE.

All budget revisions must be submitted in writing to and approved by OFFICE prior to any expenditure. All written requests must follow established procedures using the process established by OFFICE. A written rationale for revisions must also be included with this request. Budget revisions will not be accepted from SUBCONTRACTOR after April 15 of the contract term.

8. **Budget and Narrative**

All funds to be awarded under this agreement shall be requested by SUBCONTRACTOR and approved by OFFICE prior to the commitment of expenditures using the required formats for budgets, approved CDE Earnings Projection Worksheets, and supporting narratives that shall be supplied by OFFICE.

Approved budgets are attached to this agreement as Attachment B.

9. **Program Earnings**

SUBCONTRACTOR may earn and receive all of its MRA if it generates 100% of specified CDE, maintains at least 95% of monthly average daily attendance (ADA), operates at least 98% of approved MDO, and spends 100% of the amount earned. For any deviations beyond the approved levels specified, SUBCONTRACTOR earnings will be reduced on a prorated basis.

10. **Compliance**

SUBCONTRACTOR shall conduct all phases of program operation in accordance with OFFICE, CDSS Community Care Licensing Division (CCLD) and other applicable rules, regulations, and mandates, and consistent with OFFICE program goals and objectives. OFFICE retains the authority to determine whether SUBCONTRACTOR meets standards with respect to program, administrative, financial management, and other requirements. To this end, the OFFICE retains the authority to conduct announced and unannounced agency and site visits and review electronic data sources at any time. Serious violations of the requirements or failure to correct any identified deficiencies in a timely manner, as determined by OFFICE, may result in suspension or termination of the agreement with or without advanced notice depending on the severity of the violation.

When Federal, State, local, or OFFICE requirements vary from each other or SUBCONTRACTOR’s requirements, the most stringent provision(s) take precedence.

OFFICE expects SUBCONTRACTOR to achieve successful outcomes for all enrolled children and families through the provision of high-quality, comprehensive services by well-trained and supported staff. Furthermore, OFFICE expects SUBCONTRACTOR to respond to communication and submit required invoices and reports and requests for information, clarification and/or documentation in a timely, accurate manner.
SUBCONTRACTOR demonstrates commitment to providing a high-quality program by:
(1) participating in the Quality Rating and Improvement System (QRIS) program;
(2) effectively addressing issues related to culture, diversity, and equity;
(3) fostering relationships, interactions, and guidance at all levels;
(4) engaging families and communities;
(5) including children with disabilities or other special needs;
(6) promoting health, safety and nutrition;
(7) assessing children’s development and learning;
(8) intentionally planning the learning environment and curriculum;
(9) supporting professionalism and continuous learning; and
(10) effectively administering programs and supervising staff.

All activities authorized by this agreement shall be performed in accordance with the approved budgets, agreement terms and conditions, and all relevant OFFICE and CDSS directives.

SUBCONTRACTOR certifies it has and will maintain the capacity to provide ethical and high quality early care and education services by employing staff who are trained, supported, and monitored in implementing identified best practices in education, health, safety, nutrition, and social-emotional services to children ages birth to compulsory school-age and their families as indicated appropriate by National Association for the Education of Young Children (NAEYC).

11. Food Program

SUBCONTRACTOR assures that all eligible CCTR enrolled children shall also be enrolled in the Child and Adult Care Food Program (CACFP) or the National School Lunch/Breakfast Program (NSLBP), that appropriate filing for reimbursement shall be made and that all food program revenue shall be reported to OFFICE on the monthly SUBCONTRACTOR Agency Claim as it is received by SUBCONTRACTOR. The final SUBCONTRACTOR Agency Claim shall include the amount of revenue earned if the reimbursement has not yet been received by SUBCONTRACTOR.

SUBCONTRACTOR shall also provide to OFFICE a copy of the CACFP or NSLBP review report, proposed corrective action plan, and all related correspondence within 10 calendar days of receipt of the report or correspondence.

SUBCONTRACTOR shall notify OFFICE by telephone within 24 hours and provide a copy within 10 calendar days of receipt of any termination notices related to CACFP/NSLBP services.

Failure to maintain the agency’s CACFP/NSLBP contract without deficiencies may be grounds for termination or non-renewal of this agreement.

12. Facility Licenses and Standards

SUBCONTRACTOR assures that all children shall be located in centers licensed through California Department of Social Services Community Care Licensing Division (CCLD), that all CCLD licenses shall be maintained as active status with CCLD, a copy of current, active CCLD license shall be displayed in SUBCONTRACTOR’s centers, and that copies of all current center licenses shall be on file in SUBCONTRACTOR office and copies of new center licenses shall be submitted to OFFICE prior to the first day children are present.

SUBCONTRACTOR shall maintain operational accessibility to all CCLD licensed space in accordance with American with Disabilities Act (ADA) standards and as determined appropriate by CCLD and Fire Marshall.

SUBCONTRACTOR shall ensure and maintain evidence of installation, maintenance, and operation of age-appropriate indoor and outdoor equipment and facilities meeting CCLD, ADA, and California Playground Safety (centers only) standards and regulations.
SUBCONTRACTOR shall notify identified representative of OFFICE within 24 hours of the filing of any Unusual Incident Report and provide copies of any written documents related to the incident within 2 business days of reporting.

SUBCONTRACTOR shall notify identified representative of OFFICE within 24 hours of receipt of any report when cited by any regulatory agency including those that may result in the assessment of a fine or serious non-compliance designation including any deficiency or revocation of license, contract, or agreement. SUBCONTRACTOR shall provide copies of any written documents related to each incident within 2 business days of the citation or receipt of additional documentation after the original citation.

No funds awarded under this agreement may be used to pay fines resulting from CCLD violations, other regulatory agency citations, costs of legal, consulting and accounting services incurred in prosecution of claims against the state or OFFICE, or bad debts, including losses arising from uncollectible accounts and any related legal costs.

Failure to meet CCLD requirements and maintain CCLD active license status may be grounds for reduction, non-renewal, or termination of this agreement.

13. Insurance/Incorporation Requirements

13.1. SUBCONTRACTOR shall have on file evidence of incorporation (if applicable), all pertinent insurance policies, fidelity bonds, and other coverage required by federal, state, and/or local regulations. In addition, child maltreatment coverage shall be in force during the entire term of this agreement.

13.2. SUBCONTRACTOR shall provide evidence that liability insurance at a limit of not less than $5,000,000 with no exclusions for child abuse and/or child molestation, is kept in force during the entire term of this agreement. Failure to maintain liability insurance in the limits stated above is grounds for immediate termination of this agreement.

13.3. SUBCONTRACTOR shall ensure that contracts with third party entities for the digital storage, management, and retrieval of child records include the requirements of AB 1584 (Ed Code section 49073.1) and require Cyber Liability Insurance for the duration of this agreement with a minimum of $1,000,000. Should such SUBCONTRACTOR fail to provide the required cyber insurance, SUBCONTRACTOR is responsible for procuring and maintaining such policy.

13.4. SUBCONTRACTOR shall list OFFICE as additionally insured on the Liability and Cyber Liability Insurance policy.

13.5. SUBCONTRACTOR shall purchase and maintain child accident insurance coverage for all children enrolled.

13.6. SUBCONTRACTOR shall purchase and maintain Directors and Officers Insurance in the amount of at least $1,000,000 per incident/ $1,000,000 in aggregate. (Not applicable to school districts that are self-insured.)

14. Mileage Reimbursement and Out-of-Area Travel

SUBCONTRACTOR shall be reimbursed for travel and per diem expenses only at rates that do not exceed the rates paid to CDSS's non-represented employees computed in accordance with California State Department of Personnel Administration regulations, California Code of Regulations, Title 2, Division 1, Chapter 3, Subchapter 1.
15. **Required Reports/Documents**

SUBCONTRACTOR agrees to submit to OFFICE or have on file such reports and other program data as may be required by CDSS, CCLD, or OFFICE in accordance with indicated timelines, including but not limited to the items listed on Attachment C – Required Documentation and Submission Timelines.

Failure of SUBCONTRACTOR to submit and/or have available on file any of the reports listed in Attachment C in a complete, accurate, and timely manner may be sufficient cause for OFFICE to delay payment of any or all funds then due SUBCONTRACTOR until such time as the required reports are submitted or available to and accepted by OFFICE.

SUBCONTRACTOR **must use** the designated, mandatory forms, software, data management systems, policies, and procedures selected by OFFICE unless an approved waiver is on file. A waiver may be requested in writing using OFFICE’s established procedure. Approval must be granted prior to the SUBCONTRACTOR’s implementation of waived material. OFFICE is under no obligation to approve requested waiver(s).

16. **Internal Controls**

SUBCONTRACTOR shall perform its fiscal duties utilizing adequate internal controls, including appropriate segregation of duties and full implementation of the identified accounting software and related written agency procedures.

SUBCONTRACTOR shall include appropriate safeguards to detect fraudulent activities in the program areas of, but not limited to, enrollment and fiscal procedures.

SUBCONTRACTOR shall ensure that all financial information used for reporting and planning are complete, accurate, and produced in the most efficient manner in which reliance on manually calculated amounts are minimized or eliminated.

17. **Meetings with SUBCONTRACTOR and Site Visits**

Regular meetings with SUBCONTRACTOR management staff shall be hosted and facilitated by OFFICE and attended by SUBCONTRACTOR. OFFICE shall also make site visits as deemed necessary to monitor and implement provisions of this agreement. Such site visits may be scheduled in advance or unannounced.

18. **Annual Program Evaluation**

18.1. OFFICE and SUBCONTRACTOR shall annually conduct a Program Evaluation to assess compliance and quality. The documents and procedures to be used shall be designated by OFFICE.

18.2. Training shall be provided by OFFICE to key SUBCONTRACTOR staff, parents, board members, and community SUBCONTRACTORS who will participate as part of the Program Evaluation process.

18.3. SUBCONTRACTOR will establish and maintain a physical and/or electronic Compliance Monitoring Review box that includes all required information, documents, and files for each classroom/site that is available for review at any time.

18.4. SUBCONTRACTOR understands and agrees that SUBCONTRACTOR shall be responsible to develop a written plan outlining strategies for corrective actions for each noncompliance item, and that failure to develop and implement such a plan may result in OFFICE not offering an agreement to SUBCONTRACTOR in ensuing years.
19. Participation in OFFICE functions

SUBCONTRACTOR agrees to participate in OFFICE coordinated meetings, trainings, events, and other functions that are consistent with the goals of the program or necessary for the OFFICE to discharge its responsibility to CDSS. OFFICE shall provide guidance to SUBCONTRACTOR in the conduct of activities provided under this agreement. OFFICE shall also make announced and unannounced site visits as deemed necessary to implement provisions of this agreement.

20. Maintenance of Records

20.1. SUBCONTRACTOR shall prepare and maintain appropriate fiscal, programmatic, management, personnel, property, and other records that may be required by relevant regulatory directives.

20.2. SUBCONTRACTOR shall maintain all financial records and supporting documentation according to generally accepted accounting principles for public agencies and/or non-profit organizations.

20.3. SUBCONTRACTOR shall permit OFFICE and/or agents of CDSS to review, evaluate, and/or audit said records as deemed necessary for purposes of monitoring compliance with this agreement.

20.4. All records shall be stored maintained securely for a minimum of five years after completion of the agreement period.

21. Property Management

21.1. Title to equipment and/or supplies purchased with OFFICE funds vests with the SUBCONTRACTOR only so long as this agreement is in effect. Upon termination of this agreement, title to all equipment and remaining supplies shall revert to the OFFICE in trust for CDSS.

21.2. Property, equipment, and/or supplies purchased on behalf of SUBCONTRACTOR by OFFICE that would be subject to inventory provisions if purchased by SUBCONTRACTOR must be included in SUBCONTRACTOR inventory records with notation of any items purchased by OFFICE.

21.3. A control system must be maintained to ensure adequate safeguard to prevent loss, damage, or theft (any loss, damage, or theft must be investigated) and adequate maintenance procedures must be developed to keep equipment in good condition.

21.4. A perpetual property inventory shall be maintained by SUBCONTRACTOR containing the following minimum information for all equipment and supplies with a purchase price of at least $500 and a useful shelf life of over 1 year that were purchased with CDSS funds:

- Description, including intended use and estimated useful life
- Manufacturer’s serial number or identification number
- Asset number
- Acquisition date
- Original cost
- Vendor name and address
- Source(s) of funding used to purchase
- Percent of CDSS funds used to purchase item
- Location of item
- Condition
- Ultimate disposition data (including date of disposal and sale price, if applicable)
21.5. A physical inventory must be completed annually. Discrepancies between physical inventory and property records shall be noted and any differences shall be reconciled. Said inventory shall be submitted to OFFICE no later than 45 calendar days after the program fiscal year ends.

21.6. The CDSS definition of equipment purchased with subcontract funds shall apply to all property. Any unit of equipment with a purchase cost of $5,000 or more, including all cost associated with purchase, and having a useful life of one year or more and purchased with CDSS funds shall have prior written authorization from OFFICE. Any request for the purchase of equipment of $5,000 or more shall include 3 price quotes. All equipment purchases of $5,000 must be approved by CDSS prior to purchase.

21.7. Written approval must be given by OFFICE in order for SUBCONTRACTOR to dispose of any item with a current per unit fair market value of $1,000 or more and having a useful life of more than one year.

22. SUBCONTRACTOR Payment

Funds shall be disbursed to SUBCONTRACTOR according to the following schedule, subject to the receipt of funds by OFFICE.

22.1. SUBCONTRACTOR may have funding advance payments available for the months of July, August and September. In order to receive the advance payments, individual monthly invoices for the amount of child days of enrollment projected to be earned as provided in Attachment A multiplied by the rate in Section 4 and shall be filed by the date of full execution of this agreement.

22.2. Any actual under- or over-earning of child days of enrollment realized for July, August, and September adjusted for family fees collected will be included in the October claim through the year-to-date figures on the OFFICE provided invoice template.

22.3. SUBCONTRACTOR shall file a monthly Agency Invoice with supporting documentation of actual child days of enrollment earnings, family fees collected, and expenditures with OFFICE no later than the 15th of the month following the activities reported.

Each invoice will include only the accurate and true amounts from SUBCONTRACTOR’s accounting and child data management records and shall not include any late fees charged by any vendor, regulatory agency, or financial institution.

Should an extension for submission of the monthly invoice be necessary, a request should be made to the Coordinator – Business Services before the due date. For invoices for the months of September, December, March, and June no extensions can be granted due to report filing deadlines.

22.4. Upon the receipt and approval of each monthly invoice submitted by SUBCONTRACTOR, the OFFICE shall reimburse SUBCONTRACTOR claim. Total reimbursements shall not exceed the specified Maximum Reimbursable Amount as allocated in Section 2.0.

22.5. OFFICE reserves the right to refuse payment of any claim, or any final payment due SUBCONTRACTOR until OFFICE is satisfied SUBCONTRACTOR has fulfilled all of its obligations under this agreement, including filing of all required reports and correction of audit or program compliance findings or deficiencies. Payment shall not be unreasonably withheld and any amounts will be consistent with the nature of the unfulfilled obligation or deficiency.

22.6. A final adjustment of payments, based upon actual earnings and expenditures, shall be made by OFFICE no later than 60 days after the close of the program year. Any overpayment to SUBCONTRACTOR shall be refunded to OFFICE within 15 calendar days of notification.
22.7. SUBCONTRACTOR shall submit all final invoices as required in Section 15 and Attachment C.

22.8. SUBCONTRACTOR shall have and adhere to a board adopted policy prohibiting interfund loans using contract funds.

22.9. The consideration paid to SUBCONTRACTOR, as provided in this agreement, is the full compensation for all SUBCONTRACTOR’s expenses incurred in the performance of this agreement. SUBCONTRACTOR must be reimbursed for actual costs that are necessary, allowable, reasonable and allocable to the performance of this agreement.

23. CalPERS/CalSTRS Retirement Reporting

1. Is the SUBCONTRACTOR an employee of the OFFICE? Yes ☐ No ☐

2. Have any SUBCONTRACTOR employees previously been employed by the OFFICE? Yes ☐ No ☐

3. Are any SUBCONTRACTOR employees a California Public Employees Retirement System (CalPERS) or California State Teachers Retirement System (CalSTRS) member? Yes ☐ No ☐

   If yes, which system? CalPERS ☐ CalSTRS ☐

4. Are any SUBCONTRACTOR employees or subcontractors a CalPERS retiree or CalSTRS retiree? Yes ☐ No ☐

   If yes, which system? CalPERS ☐ CalSTRS ☐

24. Staff/Child Ratios

SUBCONTRACTOR assures that staff/child ratios shall be maintained per applicable regulations determined by source of program funds. The most restrictive applicable regulations shall apply to all children served at the same time.

<table>
<thead>
<tr>
<th>Source of Program Funds</th>
<th>Applicable Regulations</th>
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<tbody>
<tr>
<td>CDSS Funds Only</td>
<td>Title 5 and Title 22</td>
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<tr>
<td>Head Start and CDSS</td>
<td>Title 5, Title 22, and Head Start Performance Standards</td>
</tr>
</tbody>
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25. Audit Requirements

25.1. SUBCONTRACTOR’s financial and business activities, procedures, and records shall be audited annually by an independent Certified Public Accountant. Such audit shall be conducted in accordance with applicable federal and state laws, regulations, and audit guidelines. Audit shall be paid for by SUBCONTRACTOR. Such audit costs may be included in SUBCONTRACTOR budget.

25.2. SUBCONTRACTOR agrees to timely correction of all audit findings related to the performance of this agreement, if any, to the satisfaction of the OFFICE and ACF. Corrective procedures recommended in the audit report will be reviewed by OFFICE with SUBCONTRACTOR, and a deadline date for implementation shall be established by OFFICE. Failure to correct audit deficiencies in a timely manner may result in OFFICE withholding payments to SUBCONTRACTOR or termination or non-renewal of this agreement.
25.3. SUBCONTRACTOR shall be responsible for any monetary losses as the result of any audit exception or disallowance caused by, or as a result of, SUBCONTRACTOR’s lack of performance as required by this agreement.

25.4. SUBCONTRACTOR shall provide OFFICE with an electronic copy of the audit report and associated management letter(s) within 3 calendar days of receipt and acceptance of said report from auditors.

26. Subcontracting

26.1. No portion of the program operations or of program funds shall be subcontracted, used to jointly operate a different program with another agency, or otherwise contracted by SUBCONTRACTOR without prior written authorization from OFFICE.

26.2. All subcontracts are subject to audit as required by OFFICE.

26.3. The SUBCONTRACTOR, its agents and employees, in the performance of a subcontract, are acting in an independent capacity and not as officers, agents, or employees of OFFICE or CDSS.

26.4. SUBCONTRACTOR agrees to indemnify and hold harmless the OFFICE, its officers, agents, and employees from any and all claims and losses occurring or resulting to any and all contractors, SUBCONTRACTORS, material-men, laborers, and any other person, firm or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this agreement, and from any and all claims and losses occurring or resulting to any person, firm, or corporation that may be injured or damaged by the SUBCONTRACTOR in the performance of this agreement.

26.5. The SUBCONTRACTOR, and the agents and employees of the SUBCONTRACTOR, in the performance of the subcontract are acting in an independent capacity and not as officers, employees, or agents of the OFFICE.

26.6. SUBCONTRACTOR shall include the nondiscrimination and compliance provisions of Section 36 of this agreement in all subcontracts to perform work under this agreement.

27. Annual Agreement Renewal

The completion of an agreement by SUBCONTRACTOR does not grant vested rights to subsequent agreements. SUBCONTRACTOR shall be notified of renewal criteria during the annual contract review process.

28. Savings Clause

Any provision of this agreement found to be in violation of federal or state statute or regulation shall be invalid, but such a finding shall not affect the remaining provisions of this agreement.

29. Termination of the Agreement

29.1. Termination for Convenience

a. SUBCONTRACTOR or OFFICE may terminate this agreement for any reason during the agreement term. The SUBCONTRACTOR or OFFICE shall notify the other of its intent to terminate the contract at least 30 calendar days prior to the date it intends to terminate the agreement.

b. Within 15 calendar days from the date the SUBCONTRACTOR notifies the OFFICE of its intent to terminate the agreement, the SUBCONTRACTOR shall submit: (1) a current inventory of equipment and
supplies with a purchase price of $500 or more and/or a shelf life of over one year purchased in whole or in part with agreement funds; (2) the names, addresses, and telephone numbers of all families served by the agreement; and (3) the names, addresses, and telephone numbers of all staff members funded by the agreement.

c. The OFFICE shall only be obligated to compensate SUBCONTRACTOR for net reimbursable program costs in accordance with this agreement through the date of termination. There shall be no other compensation to the SUBCONTRACTOR. The OFFICE shall offset any monies the SUBCONTRACTOR owes OFFICE against any monies the OFFICE owes SUBCONTRACTOR under this agreement.

29.2. Failure to Perform

OFFICE may cancel this agreement by giving 30 calendar days written notice of termination to the SUBCONTRACTOR if SUBCONTRACTOR fails to comply with the terms and conditions of this agreement or if OFFICE determines that the performance of SUBCONTRACTOR under this agreement is not satisfactory. Performance may be considered unsatisfactory if:

a. SUBCONTRACTOR has been determined to have one or more deficiencies in a single review conducted by OFFICE;
b. SUBCONTRACTOR has any criminal or civil judgements levied against the agency.
c. SUBCONTRACTOR has had one or more CCLD license revocation of operated child care centers;
d. SUBCONTRACTOR has been suspended or terminated from any program or other funding source;
e. SUBCONTRACTOR, principal, or Governing Board member has been debarred from receiving Federal or State funds from any Federal or State department or agency or has been disqualified from the either CACFP or NSLBP and has not received a waiver described in 2 CFR 180.135; or
f. SUBCONTRACTOR has been determined within the preceding 12 months to be at risk of failing to continue functioning as a going concern or has filed for bankruptcy or agreed to a reorganization plan as part of a bankruptcy settlement.

In the event of such termination, the OFFICE may proceed with the work in any manner deemed proper by the OFFICE. All costs due to the OFFICE shall be deducted from any sum due the SUBCONTRACTOR under this agreement and the balance, if any, shall be paid to the SUBCONTRACTOR upon demand. Such cancellation shall be in accordance with applicable federal and state regulations.

29.3. Breach of Contract

If SUBCONTRACTOR materially breaches any provision of this agreement, the OFFICE may terminate this agreement by giving 30 calendar days written notice of termination to the SUBCONTRACTOR. Any one of the following specific actions by SUBCONTRACTOR shall constitute a material breach of this agreement. They include, but are not limited to:

a. Noncompliance with the applicable laws, regulations, or agreement requirements.
b. Submission of false, misleading, or erroneous information to the OFFICE.
c. Failure to maintain required records.
d. Administrative mismanagement.
e. Board misconduct
f. Misuse of funds
g. Denial of access to authorized representatives of the OFFICE, CDSS, or any of their agents to all program-related or fiscal records during normal business hours.
h. Lack of fiscal accountability.
i. Unsatisfactory performance under terms and conditions of this agreement.
j. Failure to complete and submit a timely audit of the prior year agreement.
29.4. **Illegal Activities**

a. Fraud or conspiracy to defraud.
b. Misuse of CDSS funds in violation of the applicable regulations.
c. Embezzlement.
d. Maintenance of an unsafe or unhealthy physical environment for children.
e. Abuse or molestation of children.
f. Failure to report suspected child abuse or molestation.
g. Theft of supplies, equipment, or food.
h. SUBCONTRACTOR is operating in violation of regulations creating imminent danger to the health and welfare of children, parents, and/or staff.
i. Any other activity that is illegal and/or poses the threat of harm to enrolled children, their families, or staff.

29.5. **Changes in State or Federal Regulations or Laws**

If federal or state laws or regulations are changed to prohibit the performance of the OFFICE’s obligations under federal or state grant by contracting with SUBCONTRACTOR, OFFICE may terminate this agreement upon 30 calendar day’s written notice to SUBCONTRACTOR.

30. **Hold Harmless Clause**

The parties intend that an independent contractor relationship be created by this agreement and OFFICE assumes no responsibility for workers’ compensation liability. OFFICE likewise assumes no responsibility for liability for loss, damage, or injury to person(s) or property during or relating to the performance of service under the agreement.

SUBCONTRACTOR agrees to hold harmless and to indemnify OFFICE and the State of California, the officers, agents and employees of both OFFICE and State of California for any injury to person or property sustained by SUBCONTRACTOR or by any person, firm, or corporation employed directly or indirectly by the SUBCONTRACTOR or by any of the individuals participating in or associated with SUBCONTRACTOR, however caused; and any injury to person or property sustained by any person, firm, or corporation caused by any act, neglect, default, or omission of SUBCONTRACTOR or any person, firm, or corporation directly or indirectly employed by SUBCONTRACTOR upon or in connection with this agreement, or any of the participants arising out of or in the course of the term of this agreement, and SUBCONTRACTOR, at its own cost, expense, and risk, shall defend any and all actions, suits, or other legal proceedings that may be instituted against OFFICE for any such claim or demand, and pay or satisfy any judgment that may be rendered against OFFICE in any such action, suit, or legal proceedings or the result thereof. Nothing herein provided shall be construed to require SUBCONTRACTOR to hold harmless or indemnify OFFICE for liability or damages resulting from the negligence or willful act or omission of OFFICE or its officers, agents, or employees.

31. **Nondiscrimination Requirements**

31.1. **NON-DISCRIMINATION CLAUSE:** During the performance of this Agreement, Contractor and its SUBCONTRACTORS shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (e.g., cancer), age (over 40), marital status, and denial of family care leave. Contractor and SUBCONTRACTORS shall assure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Contractor and SUBCONTRACTORS shall comply with the provisions of the Fair Employment and Housing Act (Gov. Code §12990 (a-f) et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 7285 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section
12990 (a-f), set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Contractor and its SUBCONTRACTORS shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other Agreement. During the performance of this agreement, SUBCONTRACTOR shall not deny the benefits specified under the terms of this agreement to any eligible child or family on the basis of religion, color, ethnicity, sex, age, physical or intellectual, developmental, or mental disability, nor shall it discriminate unlawfully against any employee or applicant for employment because of race, religion, color, national origin, ancestry, physical handicap, mental disability, medical condition, marital status, age, gender, sexual orientation, or gender identity.

31.2. SUBCONTRACTOR shall comply with the provisions of the Fair Employment and Housing Act (Government Code, Section 12900 et seq.), the regulations promulgated there under (California Administrative Code, Title 2, Section 7285.3 et seq.), the provisions of Article 9.5, Chapter 1 Part 1, Division 3, Title 2 of the Government Code (Government Code, Sections 11135-11139.5), and the regulations or standards adopted by the awarding agency to implement such article.

31.3. SUBCONTRACTOR shall permit access by representatives of the Department of Fair Employment and Housing and the OFFICE upon reasonable notice at any time during regular business hours, but in no case less than 24 hours’ notice, to such of its books, records, accounts, other sources of information, and its facilities as said agency shall require to ascertain compliance with this clause.

31.4. SUBCONTRACTOR shall give written notice of its obligations under this clause to labor organizations with which they have collective bargaining agreements or other Memorandums(a) of Understanding.

32. Nepotism Prohibition

SUBCONTRACTOR shall not employ, hire, or otherwise compensate, directly or through contract, any member of the board of directors or any immediate family member of any member of the board of directors. Nor shall any SUBCONTRACTOR employ, hire, or otherwise compensate, directly or through contract, any individual occupying control over the SUBCONTRACTOR’s fiscal affairs when such individual’s immediate family is employed in an administrative capacity or is a member of the governing board. The term “immediate family” means wife, husband, son, daughter, mother, father, brother, sister, or relative by marriage of comparable degree; the term “administrative capacity” means a position having responsibilities relating to the selection, hiring, or supervising of employees.

No person shall directly supervise a member of his/her immediate family to include wife, husband, son, daughter, mother, father, brother, sister, or relative by marriage of comparable degree.

SUBCONTRACTOR understands that the California Political Reform Act of 174 (“PRA”) prohibits public officials from participating in making or in any way attempting to use his/her official position to influence a decision of OFFICE in which he/she has a financial interest. The SUBCONTRACTOR further understands violation of the PRA may lead to potential civil and criminal penalties should the SUBCONTRACTOR participate in making or any way attempting to use his/her official position to influence a decision of OFFICE in which he/she has a financial interest. California Government Code section 82048 defines the term “public official” for purposes of the PRA as “every member, officer, employee, or consultant of a state or local government agency.”

33. Drug-Free Workplace Act

SUBCONTRACTOR certifies that it will provide a drug-free workplace as mandated in the Drug-Free Workplace Act of 1988 (45 CFR Part 76, Subpart F).
34. **Americans with Disabilities Act**

SUBCONTRACTOR certifies that is shall comply with the Americans with Disabilities Act (ADA) of 1990 (42 U.S.C. 12101 et seq.) as well as all applicable federal and state laws and regulations, guidelines, and interpretations issued hereto.

35. **Child Support Compliance**

SUBCONTRACTOR acknowledges that (a) it recognizes the importance of child and family support obligations and shall fully comply with all applicable state and federal laws relating to child and family support enforcement including, but not limited to, disclosure of information and compliance with earnings assignment orders as provided in Chapter 8 (commencing with Section 5200) of Part 5 of Division 9 of the Family Code; and (b) to the best of its knowledge it is fully complying with the earnings assignment orders of all employees and is providing the names of all new employees to the New Hire Registry maintained by the California Employment Development Department.

36. **Trafficking Victims Protection Act**

This agreement is subject to the requirement of Section 106(g) of the Trafficking Victims Protection Act of 2000, as amended (22 USC 7104).

37. **Clean Air Act and Federal Water Pollution Control Act**

This agreement is subject to the applicable requirements of the Clean Air Act (42 USC 7401-7671(q)) and Federal Water Pollution Control Act as amended (33 USC 1251-1387).

38. **Licenses and Standards**

SUBCONTRACTOR assures that all required Federal, State, and Local Government licenses, standards, and procedures are maintained during the provision of services stipulated in this agreement.

39. **Liability of SUBCONTRACTOR Negligence**

SUBCONTRACTOR shall be responsible for performing the work in a safe and skillful manner consistent with generally accepted standards of the Early Education profession, and shall be liable for its own negligence and the negligent act of its employees, agents, contractors, and SUBCONTRACTORS. Except as set forth in this agreement, OFFICE shall have no right of control over the manner in which the work is to be done but only as it its outcome, and shall not be charged with the responsibility of preventing risk to SUBCONTRACTOR or its employees, agents, contractors, and SUBCONTRACTORS.

40. **OFFICE’S Right of Retention**

OFFICE shall become the owner of, and entitled to exclusive possession of all records, documents, graphs, photographic, or other reproductions of any kind produced in the scope of services performed and no other uses thereof will be permitted except by permission of OFFICE. Proprietary materials will be exempted from this clause.

41. **Amendment/Alteration of Agreement**

41.1. The terms and conditions of this agreement are subject to approval and possible amendment by state and/or federal agencies having jurisdiction over program and funding. No alteration or variation of the
terms of this agreement shall be valid unless made in writing and signed by the parties hereto, and no oral understanding or agreement not incorporated in this agreement shall be binding on either party.

41.2. If SUBCONTRACTOR makes programmatic or fiscal adjustments outside the conditions of this agreement and without proper amendment to this agreement, it does so without assurance that such actions will be approved later by OFFICE or CDSS.

This agreement is the complete and exclusive statement of the mutual understanding of the parties and this agreement supersedes and cancels all previous written and oral agreements and communications relating to the subject matter of the agreement.

In witness whereof; OFFICE and SUBCONTRACTOR have executed this agreement this 1st day of July, 2023.

COMMUNITY ACTION PARTNERSHIP KERN:

JEREMY TOBIAS,
CHIEF EXECUTIVE DIRECTOR

SAN JOAQUIN COUNTY OFFICE OF EDUCATION:

TROY A. BROWN, Ed.D.
COUNTY SUPERINTENDENT OF SCHOOLS

By: Warren Sun, Division Director
   Operations and Support Services

Warren Sun

Signature

Date

June 1, 2023

Signature

Date
• Project Manager Authorization •

Total Contract Amount: $2,458,117
Budget Account Number: 12-6105-0-8500-1000-5800-700-7730 = $25,000
Budget Account Number: 12-6105-0-8500-1000-5100-700-7730 = $2,433,117
Budget Account Number: 12-5025-0-8500-1000-5100-700-7740 = $0

Jane Steinkamp CS June 1, 2023
Project Manager’s Signature Date

• Certification Regarding Debarment, Suspension, or Ineligibility •

The SUBCONTRACTOR certifies that the SUBCONTRACTOR, and any of its Principals, independent contractors, and/or SUBCONTRACTORS:

1. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency, and;
2. Have not, within a three-year period preceding this contract, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or preforming a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
3. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with, commission of any of the offenses enumerated in paragraph 2 (above) of this section; and
4. Have not within a three-year period preceding this agreement had one or more public transactions (Federal, State, or local) terminated for cause or default.

Jane Steinkamp Connor Sloan June 1, 2023
Project Manager’s Signature SUBCONTRACTOR Signature

• Fingerprinting Certification •

I hereby certify that the SUBCONTRACTOR for this project will have contact with students, unsupervised by OFFICE. A certification of criminal background check is attached.

Jane Steinkamp CS June 1, 2023
Project Manager’s Signature Date

• San Joaquin County Office of Education •

Warren Sun June 1, 2023
Contract Manager’s Signature Date
**Contractor Certification of Criminal Background Check**

**Community Action Partnership Kern** certifies that pursuant to Education Code 45125.1, it has conducted criminal background checks, through the California Department of Justice, on all employees providing services to the San Joaquin County Office of Education, pursuant to the contract/purchase order dated *July 1, 2023* and that none have been convicted of serious or violent felonies, as specified in Penal Code Sections 1192.7(c) and 667.5(c), respectively.

I declare under penalty of perjury under the laws of the United States that the foregoing is true and correct.

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______________________________
Signature of Contractor/Consultant

Jeremy T. Tobias, Chief Executive Officer
Title of Person Signing Certification
ATTACHMENTS:

1. Attachment A – CDE Earnings Projection Worksheet
2. Attachment B – Approved Budget
3. Attachment C – Required Documentation and Submission Timelines
### CAPK CDE Projection Worksheet - Initial
2023-24

#### Family Fees:

$15,952 reported as of 1/31/23 divided by 8 months multiplied by 12 months = $23,928.

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#### Monthly Projected Earnings

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<td>192,422</td>
<td>183,420</td>
<td>211,551</td>
<td>192,422</td>
<td>212,677</td>
<td>222,804</td>
<td>222,804</td>
<td>192,422</td>
<td></td>
<td></td>
<td>$2,481,229</td>
<td></td>
</tr>
</tbody>
</table>

#### Projected Vacancy Rate:

20.000000%

#### Net Projected CDE:


#### Monthly Projected Earnings:

$192,422, $232,832, $202,549, $222,804, $192,422, $183,420, $211,551, $192,422, $212,677, $222,804, $222,804, $192,422, $2,481,229

---

Contract: CCTR
CDE: 50,330,000
Rate: 48.84 $
MRA: 2,458,117
Family Fees: 23,928 $
Contract to Earn: 2,482,045
CDE's needed: 50,766

---

Z:\Business\Head Start\23-24\State\CAPK\CAPK CCTR 23-24 Budget-Proj. Wksh. Initial.xlsx
### 1000 Certificated Salaries:

<table>
<thead>
<tr>
<th># of positions</th>
<th>Title</th>
<th>Daily Hours</th>
<th>Daily Rate</th>
<th>Annual Days</th>
<th>% to this Program</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Site Supervisor</td>
<td>8</td>
<td>$216.00</td>
<td>260</td>
<td>59.89%</td>
<td>$235,440</td>
</tr>
<tr>
<td>0</td>
<td>Site Supervisor</td>
<td>8</td>
<td>$197.96</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Site Supervisor</td>
<td>8</td>
<td>$197.96</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
</tr>
<tr>
<td>13</td>
<td>Teacher</td>
<td>8</td>
<td>$189.84</td>
<td>260</td>
<td>59.89%</td>
<td>$384,290</td>
</tr>
<tr>
<td>15</td>
<td>Teacher</td>
<td>8</td>
<td>$175.36</td>
<td>260</td>
<td>59.89%</td>
<td>$409,591</td>
</tr>
<tr>
<td>8</td>
<td>Teacher</td>
<td>8</td>
<td>$149.12</td>
<td>260</td>
<td>59.89%</td>
<td>$185,761</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>Teacher</td>
<td>0</td>
<td>260</td>
<td>59.89%</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

### 2000 Classified Salaries:

<table>
<thead>
<tr>
<th># of positions</th>
<th>Title</th>
<th>Daily Hours</th>
<th>Daily Rate</th>
<th>Annual Days</th>
<th>% to this Program</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Assistant Teacher</td>
<td>8</td>
<td>$133.20</td>
<td>260</td>
<td>59.89%</td>
<td>$311,117</td>
</tr>
<tr>
<td>3</td>
<td>Classroom Aide</td>
<td>8</td>
<td>$124.00</td>
<td>260</td>
<td>59.89%</td>
<td>$57,926</td>
</tr>
</tbody>
</table>

### 3000 Employee Benefits:

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate/Per FTE</th>
<th>Base (Either Total FTE or Salary Base)</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement</td>
<td>5.00%</td>
<td>$1,584,125</td>
<td>$79,206</td>
</tr>
<tr>
<td>Social Security</td>
<td>6.2%</td>
<td>$1,584,125</td>
<td>$98,216</td>
</tr>
<tr>
<td>Medicare</td>
<td>1.45%</td>
<td>$1,584,125</td>
<td>$22,970</td>
</tr>
<tr>
<td>SUI</td>
<td>$434</td>
<td>61</td>
<td>$15,856</td>
</tr>
<tr>
<td>WC</td>
<td>4.0%</td>
<td>$1,584,125</td>
<td>$63,559</td>
</tr>
<tr>
<td>Health &amp; Other Insurance</td>
<td>$11,136</td>
<td>61</td>
<td>$400,505</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>0.1%</td>
<td>$1,584,125</td>
<td>$1,109</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td>$-</td>
</tr>
</tbody>
</table>
### 4000 Books and Supplies:

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate/Per FTE Amount</th>
<th>FTE Amount</th>
<th>% to this program</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Supplies</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custodial</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 5000 Services and other Operating Expenses:

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate/Per FTE Amount</th>
<th>FTE Amount</th>
<th>% to this program</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mileage</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracts</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilities</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rentals</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subscriptions</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 6100/6200 Other Approved Capital Outlay:

<table>
<thead>
<tr>
<th>Project and Site</th>
<th>Rate/Per FTE Amount</th>
<th>FTE Amount</th>
<th>% to this program</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$ -</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 6400 New Equipment (program related with prior approval):

<table>
<thead>
<tr>
<th>Project and Site</th>
<th>Rate/Per FTE Amount</th>
<th>FTE Amount</th>
<th>% to this program</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
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<td>$ -</td>
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</tr>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 6500 Equipment Replacement (program related with prior approval):

<table>
<thead>
<tr>
<th>Project and Site</th>
<th>Rate/Per FTE Amount</th>
<th>FTE Amount</th>
<th>% to this program</th>
<th>Annual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$ -</td>
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</tr>
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<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$ -</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project and Site</td>
<td>Rate/Per FTE</td>
<td>Amount</td>
<td>FTE Amount</td>
<td>% to this program</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------</td>
<td>--------</td>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td></td>
<td>$</td>
<td>-</td>
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<td>$</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>$</td>
<td>-</td>
<td>$</td>
<td>-</td>
</tr>
</tbody>
</table>

**Indirect:**

<table>
<thead>
<tr>
<th>Basis</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 2,265,546.00</td>
<td>8.50%</td>
</tr>
</tbody>
</table>

**Total Budget:** $ 2,458,117

**Expected Funding Amount:** $ 2,458,117

**Under/(Over) Budget:** $ -
<table>
<thead>
<tr>
<th>Document #</th>
<th>Description</th>
<th>Keep on file</th>
<th>Submit via email</th>
<th>Submit to</th>
<th>Submission Deadlines</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>Annual Calendar showing program self-evaluation events, staff development events including parent-teacher conferences, board meetings, and other applicable agency events.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P2</td>
<td>Annual Program Self-Evaluation Plan documenting relevant activities and timelines throughout the year.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P3</td>
<td>Annual Staff Development Plan documenting professional development activities aligned to the PSE.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P4</td>
<td>Annual Parent Engagement Plan.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P5</td>
<td>Staff Handbook(s).</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P6</td>
<td>Parent Handbook(s).</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P7</td>
<td>An Organization Chart showing the personnel structure of the organization.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P8</td>
<td>Job Descriptions for positions funded all or in part through this contract that include a summary of the position, minimum qualifications (education, experience, and authorizations), essential functions, and chain of command.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P9</td>
<td>Current Employee Roster listing all employees funded all or in part through this contract, including job titles, assigned primary work location, and pay rates.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P10</td>
<td>Current list of all Governing Board Members and annual Board Meeting Calendar including meeting dates, times, and locations.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P11</td>
<td>Current, signed Conflict of Interest statements for board members and key agency staff involved in making financial decisions.</td>
<td>X</td>
<td></td>
<td>Available for review by August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P12</td>
<td>Governing Board approved Personnel and Program Policies including but not limited to evidence that vacant positions are appropriately advertised, documentation of the selection process, and verification that hired staff have appropriate permits and meet necessary qualifications.</td>
<td>X</td>
<td></td>
<td>Available for review by August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P13</td>
<td>Personnel File for each employee that contains all required documents including, but not limited to pre-employment health exams, copies of permits, current TB test results, documentation of immunizations, immunity, or declination forms, and a Department of Justice criminal background check clearance.</td>
<td>X</td>
<td></td>
<td>Available for review by August 2nd for current employees and no later than the start day for new employees</td>
<td></td>
</tr>
<tr>
<td>P14</td>
<td>Copies of all applicable Insurance Policies and Contracts, including but not limited to facilities, providers, consultant services and health/disabilities services or others as needed.</td>
<td>X</td>
<td></td>
<td>Available for review by August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P15</td>
<td>Continued Funding Application information (calendar, roster of sites). *</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due November 15*</td>
<td></td>
</tr>
<tr>
<td>P16</td>
<td>Program Self Evaluation and required documents. *</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due April 1*</td>
<td></td>
</tr>
<tr>
<td>P17</td>
<td>Plan of Action responses to Monitoring Reports and other requests requiring such plans.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due within 14 calendar days of receipt of report</td>
<td></td>
</tr>
<tr>
<td>P18</td>
<td>Notification of any personnel changes for all management staff, at program and site level.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due within 2 business days of the change</td>
<td></td>
</tr>
<tr>
<td>Document #</td>
<td>Description</td>
<td>Keep on file via email</td>
<td>Email to</td>
<td>Submission Deadlines</td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>------------------------</td>
<td>---------</td>
<td>---------------------</td>
<td></td>
</tr>
<tr>
<td>P19</td>
<td>Copies of new or revised <strong>CCLD License</strong> for each site (submitted as applicable).</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due prior to the first day children are present</td>
<td></td>
</tr>
<tr>
<td>P20</td>
<td><strong>Notification of any high-risk incident</strong> that occurs, including those that endanger the life of any enrolled child, have the potential to create negative publicity or press, or give rise to the need to submit an Unusual Incident or Accident Report (LIC624), a Suspected Child Abuse Report, or any other mandated report.</td>
<td>X</td>
<td><a href="mailto:csloan@sjcoe.net">csloan@sjcoe.net</a></td>
<td>Notify SJCOE within 24 hours of the incident and provide copies of written documents within 2 business days</td>
<td></td>
</tr>
<tr>
<td>P21</td>
<td><strong>Notification of any review or investigation by a regulatory agency</strong> or of any situation possibly triggering punitive action such as, but not limited to: CCLD revocation of any child care center license; suspension or revocation of contract, services, or funding by CDE or other federal or state agency; debarment of staff, governing board member, program, agency, or contract representative by CACFP or NSLBP or other federal or state agency; intent to declare bankruptcy; identified fraud, whistle-blower, or other misuse of funds, services, or conflict of interest complaint or investigation.</td>
<td>X</td>
<td><a href="mailto:csloan@sjcoe.net">csloan@sjcoe.net</a></td>
<td>Notify SJCOE within 24 hours of the incident</td>
<td></td>
</tr>
<tr>
<td>P22</td>
<td>Any <strong>Reports or Citations</strong> issued by a regulatory agency including supporting documentation.</td>
<td>X</td>
<td><a href="mailto:csloan@sjcoe.net">csloan@sjcoe.net</a></td>
<td>Due within 2 business days of receipt</td>
<td></td>
</tr>
<tr>
<td>P23</td>
<td><strong>Child File</strong> for each enrolled child that includes family registration and eligibility documentation.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review by the 5th working day of the month</td>
<td></td>
</tr>
<tr>
<td>P24</td>
<td>Complete and current <strong>Personnel Rosters</strong> for all sites (or confirmation that there are no changes to the documents submitted the previous month).</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due the 5th day of the month</td>
<td></td>
</tr>
<tr>
<td>P25</td>
<td>Quarterly updates to the <strong>Sites and Program Information for CDMIS spreadsheet</strong> (or confirmation that there are no changes to the document submitted the previous quarter).</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due the 5th working day of the month (August, November, February &amp; May)</td>
<td></td>
</tr>
<tr>
<td>P26</td>
<td><strong>Staff Development Event Documentation</strong> including sign-in sheets, handouts, and agendas.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review by the 5th working day of the month</td>
<td></td>
</tr>
<tr>
<td>P27</td>
<td><strong>Parent Engagement Event Documentation</strong> sign-in sheets, handouts, and agendas.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review by the 5th working day of the month</td>
<td></td>
</tr>
<tr>
<td>P28</td>
<td><strong>Board Meeting Documentation</strong> including minutes, sign-in sheets, and handouts.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review by the 5th working day of the month</td>
<td></td>
</tr>
<tr>
<td>P29</td>
<td><strong>Daily Roster</strong> on which parents/guardians have signed children in and out of centers. Roster must include full signatures of authorized adults and indicate the actual time of arrival and departure.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review by the 5th working day of the month</td>
<td></td>
</tr>
<tr>
<td>P30</td>
<td><strong>CDD-801A Electronic File Transfer Status Report</strong></td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due the 10th of the month for prior month</td>
<td></td>
</tr>
<tr>
<td>P31</td>
<td><strong>Family Language Instrument</strong> and <strong>Family Interest Interview</strong> for all enrolled families.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review within 30 calendar days of child’s enrollment</td>
<td></td>
</tr>
<tr>
<td>P32</td>
<td><strong>Contract Monitoring Review</strong> information, files, and documentation for each classroom/site.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review by August 2nd and within 5 business days of any changes</td>
<td></td>
</tr>
<tr>
<td>P33</td>
<td>Desired Results Developmental Profile (DRDP) information including but not limited to documentation of completed DRDP assessment for each enrolled child within 60 calendar days of enrollment and after every 6 months; documentation of two completed parent-teacher conferences annually for each enrolled child; and documentation or completion and submission of results of an annual parent survey.</td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Available for review (online and/or paper) by the 5th working day after the close of each rating period or event</td>
<td></td>
</tr>
<tr>
<td>Document #</td>
<td>Description</td>
<td>Keep on file</td>
<td>Submit via email</td>
<td>Email to</td>
<td>Submission Deadlines</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------</td>
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<td>-----------------------</td>
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<td>F1</td>
<td>Updated <strong>Perpetual Equipment Inventory.</strong></td>
<td>X</td>
<td><a href="mailto:dbrauns@sjcoe.net">dbrauns@sjcoe.net</a></td>
<td>Due August 15th for prior year</td>
<td></td>
</tr>
<tr>
<td>F2</td>
<td><strong>Final Invoice</strong> for prior agreement period.</td>
<td>X</td>
<td><a href="mailto:dbrauns@sjcoe.net">dbrauns@sjcoe.net</a></td>
<td>Due September 15th for prior year</td>
<td></td>
</tr>
<tr>
<td>F3</td>
<td>Fiscal Year <strong>Agency-Wide Audit</strong> and management letter(s).</td>
<td>X</td>
<td><a href="mailto:pgomes@sjcoe.net">pgomes@sjcoe.net</a></td>
<td>Due within 3 calendar days of receipt</td>
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<tr>
<td>F4</td>
<td><strong>CACFP or NSLBP Review Report</strong>, corrective action plan, and supporting documentation/correspondence.</td>
<td>X</td>
<td><a href="mailto:pgomes@sjcoe.net">pgomes@sjcoe.net</a></td>
<td>Due within 10 calendar days of receipt</td>
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<tr>
<td>F5</td>
<td><strong>Budget Revisions.</strong></td>
<td>X</td>
<td><a href="mailto:pgomes@sjcoe.net">pgomes@sjcoe.net</a></td>
<td>Due on or before April 15th</td>
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<tr>
<td>F6</td>
<td><strong>CACFP/NSLBP Reimbursement Claims</strong></td>
<td>X</td>
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<td>Available for review by the 5th working day of the month</td>
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<tr>
<td>F7</td>
<td><strong>CalPERS/CalSTRS Retiree Compensation Spreadsheet</strong>, as required.</td>
<td>X</td>
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<td>Available for review by the 5th working day of the month</td>
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</tr>
<tr>
<td>F8</td>
<td><strong>Enrollment and Attendance</strong></td>
<td>X</td>
<td><a href="mailto:dbrauns@sjcoe.net">dbrauns@sjcoe.net</a></td>
<td>Due the 10th of the month for the prior month</td>
<td></td>
</tr>
<tr>
<td>F9</td>
<td><strong>Monthly Agency Invoice</strong> and supporting documentation for expenditures and revenues reported</td>
<td>X</td>
<td><a href="mailto:dbrauns@sjcoe.net">dbrauns@sjcoe.net</a></td>
<td>Due the 15th of the month for the prior month</td>
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**Documents Required for Subsequent Fiscal Year**

<table>
<thead>
<tr>
<th>Document #</th>
<th>Description</th>
<th>Keep on file</th>
<th>Submit via email</th>
<th>Email to</th>
<th>Submission Deadlines</th>
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<tr>
<td>F10</td>
<td><strong>Preliminary Projection Worksheet</strong></td>
<td>X</td>
<td><a href="mailto:pgomes@sjcoe.net">pgomes@sjcoe.net</a></td>
<td>Due April 1 for subsequent fiscal year</td>
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<tr>
<td>F11</td>
<td><strong>Final Projection Worksheet</strong></td>
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<tr>
<td>F13</td>
<td><strong>Certificate of Insurance</strong></td>
<td>X</td>
<td><a href="mailto:ihettervik@sjcoe.net">ihettervik@sjcoe.net</a></td>
<td>Due July 1 for subsequent fiscal year</td>
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<tr>
<td></td>
<td><strong>Other documents as required by SJCOE, CDE, CDSS, and other regulatory agencies.</strong></td>
<td>X</td>
<td></td>
<td>To be determined</td>
<td>To be determined</td>
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</table>

*Dates are subject to change based on submission timelines established by CDE, CDSS, or other regulatory agencies.*
MEMORANDUM

To: Board of Directors
From: Catherine Anspach; Director of Development
Date: June 28, 2023
Subject: Agenda Item VI(a): CAPK Foundation Report – Action Item

The CAPK Foundation Board met in person on Tuesday, May 30, 2023 and approved the minutes from the March 28, 2023 Foundation Board meeting.

Tracy Webster presented the Financial Reports reflecting a collective narrative of CAPK & Foundation donated funds year to date.

Catherine Anspach reported on the addition of a new member to the Foundation Board, Lillian Brust, with Clifford & Bradford insurance. Catherine also reported on the following fundraising developments:

1) The paper Huggy Heart campaign through Valley Strong raised $10,000. Funds will go towards Youth & Family Services.
2) The purchase of a vehicle for Oasis FRC has been completed made possible by grant funding through Wells Fargo and Kern Heath Systems.
3) The Sponsor Package for the Friendship House Community Center mixer on October 5, 2023 is now available. The board was encouraged to participate by purchasing a ticket or a table.

As part of an ongoing component to bring visibility and awareness of CAPK’s programs to the Board, Rebecca Moreno did a presentation on M Street Navigation Center giving an overview of the program while discussing some time sensitive issues.

Recommendation:
Staff recommends the Board of Directors approve the CAPK Foundation Board of Directors report and all items.

Attachments:
Minutes from the March 28, 2023 Board of Directors meeting.
CAPK Foundation Financial Reports
COMMUNITY ACTION PARTNERSHIP OF KERN FOUNDATION
Board of Directors Meeting Minutes

I. Call to Order

Board Chair Kevin Burton called the meeting to order at 12:00 pm at the CAPK Administrative Offices, located at 5005 Business Park North, Bakersfield, CA.

a. Roll Call

Roll Call was taken with a quorum present:

Present: Kevin Burton (Chair), Don Bynum, Nila Hogan, Fred Plane, Michele Shain, Chei Whitmore

Absent: Michael Bowers, Ariana Joven, Chase Nunneley

Others Present: Jeremy Tobias, Chief Executive Officer; Pritika Ram, Chief Business Development Officer; Tracy Webster, Chief Financial Officer; Catherine Anspach, Director of Development; Rebecca Moreno, Director of Community Development; other CAPK staff.

II. Public Comments

No one addressed the Board.

III. Consent Agenda

Motion was made and seconded to approve the Consent Agenda. Carried by unanimous vote (Plane/Hogan).

IV. Old Business

a. Foundation Reception Update on March 30, 2023 – Catherine Anspach, Director of Development – Info Item

Catherine Anspach reported that there will be approximately 122 people in attendance. Catherine asked if anyone had a good prospect to invite, please do so. The event is business attire. Catherine encouraged the Board to network throughout the evening and briefly described the agenda for the event.

V. New Business

a. Financial Reports – Tracy Webster, Chief Financial Officer – Action Item

Pritika Ram presented the above action item and reported that the Foundation is using a platform called Aplos for financial reporting. Going forward, you will see a collective reporting of donations coming through for CAPK and the Foundation. Tracy Webster provided further details about the structure of the reports. There is currently a recognized loss, because the Foundation is awaiting the CAPK contribution from March. The balance sheet noted that when funds are earmarked for a specific program, the funds are directed to the programs as soon as possible and recognized as a contribution in, and a contribution out.
Kevin asked if we had received the funds for Friendship House. Pritika said that Jeremy had signed the contract and it has gone back to the City of Bakersfield for execution. Funds are expected to come to CAPK by way of a grant by mid-April. Emilio Wagner, Director of Operations, has been working to secure subcontractors to complete the work.

Motion was made and seconded to approve the financial reports presented on March 28, 2023. Carried by unanimous vote (Hogan/Shain).

b. Appointment of New Board Members – Catherine Anspach, Director of Development – **Action Item**

Catherine Anspach reported that Traco Matthews and Janea Benton have been nominated to join the Foundation Board. Janea just left her term as a Board Member of the Governing Board.

Motion was made and seconded to approve staff’s recommendation. Carried by unanimous vote (Whitmore/Bynum).

c. Highlight of Monthly Corporate Donors – Catherine Anspach, Director of Development – **Info Item**

Catherine highlighted several corporate donors that have donated to specific programs by way of the Foundation. Pritika Ram said we are beginning to see more donations from bank as they receive government dollars that they must be reinvested in the community.

d. Fundraising Developments – Catherine Anspach, Director of Development - **Info Item**

1. **Huggy Heart Campaign Sponsor – Valley Strong Credit Union**
   
   Catherine Anspach reported that she and Chei Whitmore met to discuss the Huggy Heart Campaign to run through the month of May for Community Action Month. All 11 branches of the credit union will participate with proceeds benefitting CAPK’s Youth and Family Services programs.

2. **Friendship House Mixer – October 5, 2023**
   
   Catherine Anspach reported that the Friendship House Community Center has their own governing board, and they are planning to host an event in October. It will be a mixer with finger food, music, etc. As more information is available, it will be shared with the Board.

e. Program Presentation: Food Bank – Kelly Lowery, Program Administrator – **Info Item**

Kelly Lowery provided an overview of the Food Bank and discussed some of the time sensitive issues. The scope of the operation is quite extensive, covering all of Kern County. The Food Bank re-distributes nearly 2 million pounds of food per month. 15% of people in the county are food insecure. Reports come back from the commodity, pantry, and farmers market programs and understand the reach and are serving over 135,000 people per month, however, the needs are not being met. Kelly said the goal this year is to re-initiate the Food Policy Council and he is convening a meeting next Thursday and the vision is to do that in each community in Kern County.

Kevin Burton asked about how we work with the Gleaners. Kelly said that we are partners, where the Gleaners pick up directly from the food sources, or contract with others. Jeremy added that CAPK is the official Food Bank in the County. Kelly added, if there is any emergency food distribution in the county, there is a high likelihood the food is coming from the CAPK Food Bank. We distribute nearly 20 million pounds per year. The Gleaners do not take any government funding, they accept only private donations.
Kelly shared that the pantry’s are moving to an online ordering system that is much more efficient but noted that more volunteers are needed for the daily input and fulfillment of orders.

Tracy Webster said that the Food Bank budget is heavily reliant on donations to cover food and salaries. Kelly also reported that a $3,000,000 million grant was received from the State and there are very specific guidelines on how to use the funds. That kind of funding has been essential to fund the pantry program.

Catherine has met with the programs to ask what their needs are. As the food bank expansion is completed, more staffing is required, and the Foundation funds can assist.

The programs will develop a campaign, approved by the board, and proceed. Kevin cautioned that we need to tackle one campaign at a time.

VII. **Board Member Comments**

- No comments.

VIII. **Next Scheduled Meeting**

Board of Directors Meeting  
12:00 pm  
Tuesday, May 30, 2023  
5005 Business Park North  
Bakersfield, CA 93309

IX. **Adjournment**

The meeting was adjourned at 1:00 pm.
## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>SECTION</th>
<th>Pages (s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Contributions by Purpose January 1, 2023 through April 30, 2023</td>
<td>1</td>
</tr>
<tr>
<td>B. Financial Statements as of April 30, 2023</td>
<td>2-3</td>
</tr>
<tr>
<td>C. Budget to Actual as of April 30, 2023</td>
<td>4</td>
</tr>
<tr>
<td>Purpose</td>
<td>Amount</td>
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<td>--------------------------------------------------</td>
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<tr>
<td>General</td>
<td>$9,523.84</td>
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<td>In-Kind Donations</td>
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<td>Shafter Youth Center</td>
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<td>Head Start</td>
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<td><strong>$133,181.66</strong></td>
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<td><strong>Total Assets</strong></td>
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<td><strong>Liabilities</strong></td>
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<td></td>
<td><strong>Total Liabilities</strong></td>
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<td>General Fund - Fund Balance</td>
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<td>3101</td>
<td>Food Bank - Fund Balance</td>
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<td>3107</td>
<td>Oasis Family Resource Center - Ridgecrest - Fund Balance</td>
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<td><strong>Total Equity</strong></td>
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<td><strong>Total Liabilities + Total Equity</strong></td>
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# Community Action Partnership of Kern Foundation

## Income Statement

for the period of 01/01/2023 to 04/30/2023

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<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4220</td>
<td>Contributions Income</td>
<td>$149,517.16</td>
</tr>
<tr>
<td>4230</td>
<td>Fundraising</td>
<td>$6,060.00</td>
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<tr>
<td>4450</td>
<td>Misc Revenue</td>
<td>$255.00</td>
</tr>
<tr>
<td>4900</td>
<td>CAPK Agency Contribution</td>
<td>$408,080.00</td>
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**Total Income**                                   $563,912.16

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5105</td>
<td>Salaries</td>
<td>$44,580.08</td>
</tr>
<tr>
<td>5205</td>
<td>Benefits</td>
<td>$7,143.32</td>
</tr>
<tr>
<td>6120</td>
<td>Out of Town Travel - Staff</td>
<td>$1,619.30</td>
</tr>
<tr>
<td>6135</td>
<td>Per Diem - Staff</td>
<td>$178.25</td>
</tr>
<tr>
<td>6305</td>
<td>Office Supplies</td>
<td>$2,054.84</td>
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<tr>
<td>6525</td>
<td>Software Support/Maintenance</td>
<td>$190.00</td>
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<td>6610</td>
<td>Postage</td>
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<td>Tuition/Registration Fees - Staff</td>
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<td>6660</td>
<td>Equipment Rent/Lease</td>
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<td>Outreach</td>
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<td>Licensing/Misc Fees</td>
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<td>Misc Expense</td>
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<td>Contribution - CAPK</td>
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<td>9999</td>
<td>Indirect Expense</td>
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**Total Expense**                                   $254,219.17

**Net Income (Loss)**                                 $309,692.99
# Community Action Partnership of Kern Foundation

**Budget: Year to Date**

for the period of 01/01/2023 to 04/30/2023

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<tr>
<th>Account Number</th>
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<th>YTD Budget</th>
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<td>4230</td>
<td>Fundraising</td>
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<td>$6,060.00</td>
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<tr>
<td>4450</td>
<td>Misc Revenue</td>
<td>$255.00</td>
<td>$0.00</td>
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<tr>
<td>4900</td>
<td>CAPK Agency Contribution</td>
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<td><strong>Total Income</strong></td>
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<td>$136,026.68</td>
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<td>6120</td>
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<tr>
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<td>Per Diem - Staff</td>
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<td>6140</td>
<td>Per Diem - Board</td>
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<tr>
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**Total**

|                  |                  | $309,692.99 | $-2,419.64 | $312,112.63 |
MEMORANDUM

To: Board of Directors

From: Lisa Gonzales, Program Governance Coordinator

Date: June 28, 2023

Subject: Agenda Item VII(a): June Policy Council Report – Action Item

The Policy Council met as scheduled on May 23, 2023, at which time a quorum was established.

Lisa McGranahan, Director of Human Resources, presented information to the Council proposing termination of the COVID-19 Travel Policy as well as that of the Mandatory Vaccination Policy specific to COVID-19. Additionally, proposed revisions to the Suspected or Confirmed Cases in the Workplace Policy were also presented to the Policy Council. Thorough background information including when and why the aforementioned policies were implemented was provided along with the basis of the request for termination and revisions. Robust discussion ensued and upon conclusion of such, the Policy Council unanimously approved to terminate the COVID Travel Policy, and the Mandatory Vaccine Policy as well as approving revisions as presented, to the Suspected or Confirmed Cases in the Workplace Policy.

In support of Mental Health Month, Policy Council members also received an overview from staff on the Family Wellness Services provided by the CAPK Head Start Program. This presentation covered an array of topics, such as classroom practices, screenings, referrals, trainings for staff as well as consultant services and other resources available to families.

The next Policy Council meeting is scheduled for August 22, 2023 at 5:30 p.m.

Recommendation:
The Policy Council requests Board approval of the May Report and the Policy Council meeting minutes from May 23, 2023.

Attachment:
Policy Council Meeting Minutes from May 23, 2023.
1. **Call to Order**
   Policy Council Chairperson, Ruby Cruz called the meeting to order at 5:32 p.m.
   a. Roll call was taken and a quorum was established.
   Policy Council Members Present: Susana Barrios, Ruby Cruz, Fatima Echeveria, Andrea Flores, Guillemina Herrera, Sarita Little, Monique McWilliams, Gabriel Rios, Ana Vigil, Jennifer Wilson

2. **Public Comments**
   The public wishing to address the full Policy Council may do so at this time. Policy Council members may respond briefly to statements made or questions posed. However, the Policy Council will take no action other than referring the item(s) to staff for study and analysis. **Speakers are limited to three minutes each.** If more than one person wishes to address the same topic, the total group time for the topic will be 10 minutes. Please state your name before making your presentation. Thank you.
   None

3. **Standing Committee Reports**
   a. **School Readiness Committee**
      The School Readiness Committee met on May 11, 2023. Rayjean Stone presented information to the committee on the Health and Nutrition services provided through the program. Rayjean expanded on the support services provided within the area of health and nutrition to keep children healthy. These services are necessary for optimal development and include physical exams, dental exams, immunizations, dental and hearing screens and more. It was shared that a successful transition is built on communication and sharing information, building relationships and program alignments. Members were shown a video on transitions and learned what they can do to prepare themselves and their children for an upcoming transition. The next scheduled meeting will be on June 8, 2023. Members will review the school readiness goals for 2023-2024, share feedback, and provide their input for effective family strategies to support these goals.
   b. **Planning Committee**
      The Planning Committee met on April 4, 2023; however, a quorum was not established. Report information was shared. The Enrollment and Attendance report for March 2023 was reviewed. Head Start enrollment was at 76% and Early Head Start was at 75% enrollment. There were seven new staff onboarded as well as eleven resignations. The Child Adult Care Food Program report for February 2023 noted there were 65,948 meals delivered to centers. Enrollment and Attendance staff participated in various recruitment events in both Kern and San Joaquin Counties to recruit families for full enrollment.
   c. **Budget & Finance Committee**
      The Budget & Finance Committee met on April 18, 2023 with a quorum not established. However, the staff sponsor did share the standing budget reports with those in attendance. There were no questions about the information presented. It was noted that all financial reports could be found in the current Policy Council packet. The next meeting of the Budget & Finance Committee is scheduled for 5:30 p.m. on May 16, 2023.
   d. **Bylaws Committee**
      The Bylaws Committee met on April 11, 2023 at 5:30 p.m. The committee continued its review and discussion of the CAPK Head Start Policy Council Bylaws, reviewing Articles IV through VII in detail with an opportunity for discussion. The committee also had an open discussion about the number of members on each of the Policy Council committees, as well as the duration of time a member should be logged in and present for a meeting to be counted “in attendance.” Discussion also took place about in-person meetings versus virtual meetings. The overwhelming consensus was that virtual meetings were not only more convenient but were the reason many members were able to participate in Policy Council. The next meeting is scheduled for June 13, 2023 at 5:30 p.m. The committee will resume reviewing the Policy Council Bylaws and will revisit the open discussion topics.
4. Presentations
   a. Wellness Overview – Lorena Ortiz Ibarra, Content Area Specialist Wellness, CAPK Head Start
      Lorena shared an informational overview about Head Start Family Wellness. She first spoke about the Pyramid Model, which is research based and utilized in classrooms. Lorena reviewed all the tiers of the model. She also spoke in detail to the Pyramid Practices, which included effective workforce, nurturing and responsive relationships, high quality environments, targeted social emotional supports, and intensive interventions. For each of the practices specific examples were provided and elaborated on. Lorena added that there are many other items provided such as sensory toys, a weighted blanket, etc. however they are “as needed” and tailored for the child. In discussing emotional support, Lorena shared classrooms have wellness kits which teach children problem solving and emotional regulation. Cards contained in the wellness kit help children to identify their feelings and add this language to their vocabulary.

      Lorena spoke about the ASQ-SE which is a screening tool for infants and young children whose social and emotional development requires further evaluation to determine if a referral for intervention services might be necessary. There are eight different questionnaires specific to the child’s age from six to sixty months and based upon the birthdate and chronological age of the child.

      Some of the various trainings provided annually to teaching staff were discussed. Trainings included but was not limited to, positive behavior support, feelings and emotions, expectations, behavior incident reports and more. Lorena also shared that there are other trainings that are in the developmental process and are expected to be available for the upcoming school year.

      Lorena shared, Dr. Kirk a local child psychologist also provides monthly parent as well as staff trainings. Parent training is an interactive question/answer session in which Dr. Kirk address children with challenging behaviors, special needs, trauma, and any additional topic of choice as it relates to mental health and wellness. Additional services provided include services at the request of parents/staff and assessments for children exhibiting challenging behaviors.

      The process as to how referrals are generated was reviewed with members. It was stated they are generated when a child does meet the requirements of the ASQ: SE2, persistent challenging behaviors are exhibited or at the request of a parent or staff. The referrals are made to the Family Wellness Team who upon receiving a referral conduct observations of the child, speak with the teacher, have a case conference if needed with services provided by the team.

      Various questions were posed on a variety of topics such as referrals, the pyramid model practices, sensory items, and more. All of which were individually and thoroughly addressed.

5. Consent Agenda
   *ACTION
   The Consent Agenda consists of items that are considered routine and non-controversial. These items are approved in one motion unless a member of the Council or the public requests removal of a particular item. If comment or discussion is requested, the item will be removed from the Consent Agenda and will be considered in the order listed.

   a. Policy Council Meeting Minutes – April 25, 2023 (English/Spanish)
   b. Bylaws Committee Minutes – April 11, 2023 (English/Spanish)
   c. School Readiness Committee Minutes – April 13, 2023 (English/Spanish)
   d. Planning Committee Minutes – May 2, 2023 (English/Spanish)
   e. Head Start Program Review Evaluation (PRE) Report – April
   f. Head Start Budget to Actual Report, March 1, 2023 through March 31, 2023
   g. Early Head Start Budget to Actual Report, March 1, 2023 through March 31, 2023
   h. American Rescue Plan Funding Budget to Actual Report, April 1, 2021 to March 31, 2023
   i. Parent Travel & Child Care through March 31, 2023
   j. Parent Activities through March 31, 2023
   k. Head Start and Early Head Start Non-Federal Share and In-Kind Report, March 1, 2023 through March 31, 2023
   l. Early Head Start Child Care Partnerships Non-Federal Share and In-Kind Report, March 1, 2023 through March 31, 2023
m. Anilu Saldana Termination Letter – April 19, 2023
n. Audreyanna Angel Termination Letter – April 26, 2023
o. Children’s Book Giveaway & Resource Fair – May 24, 2023; 5005 Business Park North, Bakersfield
p. Children’s Mobile Clinic – June 2023 (English/Spanish)
q. Backpack Connection Series: How to Use Social Stories to Teach Your Child New Skills and Expectations (English/Spanish)
r. Help Us Stay Calm – National Center for Pyramid Model Innovations (English/Spanish)
s. Children’s Services Resource Menu – Kem Behavioral Health & Recovery Services
t. Children and Youth Service – San Joaquin County
u. Helping Children and Adolescents Cope With Traumatic Events – National Institute of Mental Health (English/Spanish)
v. I’m So Stressed Out – National Institute of Mental Health (English/Spanish)
w. My Mental Health: Do I Need Help? – National Institute of Mental Health (English/Spanish)
x. Kem Head Start Recruitment Flyer (English/Spanish)
y. San Joaquin Early Head Start Recruitment Flyer (English/Spanish)
z. Home Visiting Program Flyer (English/Spanish)
aa. Policy Council Meeting Dates

An inquiry was made with regard to the Parent Activities account as to who decides how funds in that category are utilized. It was usually noted that there has hardly been any money spent to date. The reporting date for this report was noted to be just 30 days into the current fiscal year, March 1-31, 2023. It was stated these are dollars allocated for activities that directly relate to parents, such as the Parent Training series offered last which was open to all parents of children enrolled in the program. With the purpose clarified, the question was posed as to who decides on the activities. It was noted parents have a voice in that decision. Jennifer Wilson made a motion to approve items (a) to (aa); seconded by Monique McWilliams. Motion carried unanimously.

6. **New Business**

   a. **Nomination and Election of Policy Council Vice-Chairperson**

      It was stated that the position of Policy Council Vice-Chairperson is vacant. Prior to asking for nominations from members, it was shared that the vice-chairperson also facilitates and is the Chairperson of the Policy Council Planning Committee. It was asked if a member who already serves as a member of the Policy Council Executive Committee can be elected as the vice-chairperson; to which the response was no, per the CAPK Head Start Bylaws. It was also noted that members can only serve on a maximum of two committees. The floor was open for nominations with Andrea Flores self-nominating for the position. Pablo Reyes made a motion to approve Andrea Flores as the Policy Council Vice-Chairperson; seconded by Monique McWilliams. Motion carried unanimously.

   b. **COVID Policy and Procedures Update – Lisa McGranahan, CAPK Director of Human Resources**

      Lisa shared this is her first time attending and presenting to the Policy Council. She shared that generally when policy amendments are made to existing (agency) policies, those items are brought before the (CAPK) Personnel Committee and then the Board of Directors for full approval. Once full Board approval has been received the agency is able to implement policy amendments accordingly.

      Lisa stated the item currently brought before the Policy Council at this meeting was presented to the CAPK Board of Directors. She proceeded, stating the document is a consolidation of some items and elimination of other items all related to COVID Policies. In providing context Lisa stated in April (2023) CAPK received notification from National Head Start that the vaccine and masking mandates were found by a district court ruling unenforceable. In light of such, the proposed updates are brought as an action item to Policy Council.

      Specific changes were stated and spoken about in detail with detailed information also shared on current policies. Proposed changes included terminating the need for staff to test and quarantine upon returning from work travel, termination of the mandatory vaccine policy for employees, and volunteers as well as updating the Suspected or Confirmed Cases in the Workplace policy with the most recent Occupational Safety & Health Administration (OSHA) guidelines.
Lisa stated when presenting to the Board of Directors, they heard what was presented, understood it, as they have been on the two ½ year COVID journey with the agency, receiving updates, hearing about the number of cases, etc. The Board wanted to make sure that parents and Policy Council knew about and supported the proposed updates prior to them making their ruling. A bit more history from the onset of COVID was shared with members, with Lisa noting the creation of websites, safety plans and protocols, policies, and procedures and more. She further added when the Office of Head Start implemented their mandates, CAPK came together and decided in order to have equity across throughout the agency it was best that these policies not just apply to Head Start but to all of our programs and offices. Therefore, with these mandates now removed by Head Start, the request is for support and approval of the updates which will then be taken back to the Board of Directors’ best interest to implement across the board.

Head Start Director, Yolanda Gonzales added the program will continue to follow all safety protocols at sites. The priority is to ensure we continue to provide all the health checks, proper sanitation and to ensure children receive the utmost quality of care.

The opportunity for questions and/or clarification was extended, with responses provided. This included clarifying health checks will still take place for children, however parents will not have to wear a mask, show proof of vaccination if they want to volunteer. It was added nor would new staff be required to have the COVID vaccination, in addition if any staff had an exemption they would no longer have to test. An additional question was posed about if the Center for Disease Control (CDC) has a new variant, or if this picks up again will the agency then roll this update back and try to put the other policies in place, or what will happen. Lisa McGanahan shared at this time the CDC as well as the federal government has accepted COVID is no longer a national threat. With that she stated there is a feeling of safety to be able to move on and remove protocols, however if all of a sudden there is another type of national emergency, we as an agency responded swiftly. Lisa also stated that we were able to put individual safety plan for the entire agency, the website, mandatory policies, and protocols were in place, as well as the discussion with our attorneys on approving exemptions was all completed within about 30 days.

A motion to approve the updated COVID-19 policies and procedures and the Suspected or Confirmed Cases in the Workplace policy, was made by Monique McAllister, seconded by Fatima Echeverria. Motion carried unanimously.

7. **Standing Reports**
   a. **Program Governance – Lisa Gonzales, Program Governance Coordinator**

Lisa thanked the members for their time and for all their questions. She added that it is important they are informed and clear before making decisions on any actions.

She noted as previously shared, there will be a Book Giveaway and Resource Fair taking place at the CAPK Administrative Office with the address provided. Participants were told there will be over 28,000 books, and to bring a bag or a box or some other item to collect the books they want.

Members were reminded the deadline for the Region IX Scholarship is fast approaching. Lisa encouraged those members who are continuing their education and enrolled in classes to access the link provided to see if they qualify to apply for the scholarship. She noted that last year, both Monique McWilliams, Policy Council Parliamentarian, and members as well as Cynthia Rodriguez, Education Manager were two of the recipients of the Region IX Scholarship.

Lisa recapped with members some of the information and activities she has sent out over the course of the month in support of Mental Health Awareness month. She also touched on some of the resources contained in the Policy Council packet on the subject. The Children’s System of Care in Kern County provides a variety of services for children such as diagnostic assessments, therapeutic behavioral services as well as family and/or individual therapy and more. It was noted there is a similar resource available in San Joaquin County, San Joaquin Behavioral Health. Lisa stated that both agencies also provide mental health services for adults as well as substance abuse services. She went on to discuss the importance of mental health, noting 1 in 5 adults in America live with some form of mental health condition. She provided an example stating if we had a broken arm or leg, and were in pain, we wouldn’t shrug it off and just say to ourselves, “I’m
fine” or “It’ll feel better tomorrow.” We would seek medical attention. Lisa stated that too often we overlook our emotional and mental health and wellbeing, we don’t give it as much attention as we do our physical health. She added there can also be a stigma attached to mental health so we can sometimes feel shame or embarrassment noting that societal we have to be more accepting of each other and do better. Lisa added that we all have our own unique path and personal journey in life; you can’t necessarily tell a person’s struggles or challenges from what is present outwardly. It is important to be kind and show each other grace.

Lisa wanted to make sure that all Policy Council members received their copy of Do One Thing That Centers You, mindfulness journal. She went on to share, the journal’s intent is to encourage you to think about things through a different lens, in a way you might not have considered. She stated there are quotes and journal prompts along with areas for writing one’s own thoughts. It is about trying to find balance and hopefully remind them to be present in the moment, whatever that moment is. Lisa stated the journal was a little something from her with the hope they also never forget how important they are, how unique they are and know that they have a purpose, and it is super important that they make the time to care of themselves.

In closing Lisa shared that she recently attended the 2nd Annual Aces Conference which was very informative with over forty-two agencies represented for not only Kem County but other counties as well, including San Joaquin. Lisa stated Aces is the acronym for Adverse Childhood Experiences, and mentioned she has made available to all a great flyer she received at the conference with tips to practice self-care as well as building resiliency. Lisa also shared that she watched a short video which she found very meaningful and impactful and would be sharing with the group. Prior to doing so Lisa stated that she hoped if there was only one takeaway from her report that it be the message shared in the video. The video Smile was played, upon conclusion requests were made for the video link. Additionally, thanks were shared from members for all the information that was sent over the month as well as the journal, stating information from the journal is shared daily with others.

b. Community Representative – Nila Hogan, Y-Empowerment

Nila stated because May is Mental Health Awareness month, she too would be sharing some information on the subject. She shared a website with members (Therapist Aid) which she has started using in her business as well as personally with her children. She stated there are various levels you can access however she encouraged members to stick with the free version as it has more than enough information. The website provides a variety of different tools including worksheets for children, adolescents and for adults as well. Nila shared the reason she wanted to share this information is because often when we think about mental health we don’t tend to think about children. She added we are more inclined to think about how resilient they are. Nila shared some examples of the tools available on this platform which include guidelines, videos, worksheets and more. Nila also stated there is an ability to filter information based upon topic, be it, anxiety, anger, grief, relaxation, etc. She added the site contains quite a bit of information that can truly be used in daily life for yourself or in support of a friend. Nila encouraged members to share the website information widely with others.

c. Board of Directors – Ana Vigil, CAPK Board Member

Ana stated the Board of Directors met on April 26, 2023 with the Board of Directors approving new member seating of Gina Martinez, representative for Senator Melissa Hurtado.

Board member Marian Panos received a plaque in recognition of her six ½ years of service as a Board Member with her retirement from the Board effective April 26, 203. Chief Executive Officer, Jeremy Tobias added that he has reached out to Mayor Goh to provide a replacement for Marian. Suggestions have also been offered to fulfill the Head Start requirement that there be a member of the Board of Directors with Early Childhood Education experience.

All items on the consent agenda were approved. There were three action items presented to the Board for approval with two of those items approved. The items approved were County of Kem Administrative Office Request for Proposal for the Management and Operation of Supportive Services Village as well as the Updated Electronic Funds Transfer Policy brought forth due to an ACH data breach. The additional action item, Updated COVID Policies, was tabled until the May meeting to allow for time to present to the Policy Council and to share with parent groups. In addition, there were two informational items presented to the Board.
The CAPK Foundation report was presented by Catherine Anspach who provided an update on donations received. She also reported that former CAPK Chief Program Officer, Traco Matthews and former Board Member) ana Benton will join the Foundation Board effective May 2023. Catherine also reported during the month of May, Valley Strong Credit Union will launch the Huggy Heart campaign which will benefit the Youth & Family Services Program. Lisa Gonzales presented the Policy Council report to the Board of Directors for approval.

CEO Jeremy Tobias provided an update on the M Street Navigation Center and the Safe Camping site. It was stated that the center is at capacity with 147 beds filled. He also reported that fifty-one residents have been placed in permanent housing since January 1, 2023. In support of Community Action Month there are many events taking place including a Resource Fair to be held at the Shafter Youth Center on May 13, 2023. The meeting was adjourned at 2:07 p.m.

d. **Head Start/State Child Development – Yolanda Gonzales, Head Start/State Child Development Director**

Yolanda thanked everyone for the information and community resources shared during verbal reports. She also acknowledged all staff, part-year staff who are ready for summer break and full-year staff who will continue to provide quality services over the summer were applauded for all the work they have done and continue to do. Yolanda added the program was able to acknowledge all teachers during Teacher Appreciation Week. She thanked those who participated and helped to deliver roses, tumblers, and other goodies.

Parents were thanked and it was stated the program continues to work diligently with our staff to ensure children are receiving the best services and that parents are supported as their child’s first teacher. Yolanda thanked parents for their commitment and partnership.

Yolanda shared Parent Meetings have more than likely been completed and parents have been able to receive great information. Children were able to have some experiences as they’re leaving the program and transitioning to kindergarten.

Yolanda again thanked parents, staff, and everyone as we continue to work together as partners ensuring the program continues to provide comprehensive services to the families and children served.

8. **Policy Council Chairperson Report**

Ruby stated she was happy that everyone was present and shared a little bit about the end of year celebration at her daughter’s school, Heritage. Ruby said it was a memorable and beautiful event, memories were made with teachers and with parents. She added the children performed a few dances and it was very cute. Parents and staff came together to decorate for the event; Ruby stated she is very grateful that Head Start is available for our children because the children learn so much and have a lot of fun. She is excited about what next year will bring, as her daughter will continue in the program after summer break. Ruby shared that she feels truly blessed and happy she has made friends with parents; her center more like a second family. She added she deeply enjoys Policy Council and loves talking with others and connecting with them each month. Ruby also thanked Lisa for the beautiful journal, acknowledging we all have things going on and this journal will be really helpful.

9. **Policy Council Member Comments**

Members were given an opportunity to share comments.

Fatima Echeverria stated she had no comment, however she wanted to make sure that Lisa knew how thankful she was for the journal. She added she is very appreciative of Lisa’s support as she helps to guide members through their involvement on Policy Council. Fatima also expressed thankfulness for the teachers as well.

Andrea Flores thanked fellow members for their support in her election as Policy Council Vice-Chairperson. She stated it is a great opportunity and she loves to learn. Andrea feels she is learning so much at 22 years of age and is truly enjoying it. She added that as a young mother, there are many things she didn’t know, and all of the comments and perspectives shared help her to become a better parent and to see things differently.
Monique McWilliams thanked Lisa for the journal.

Ana Vigil encouraged members to keep up the good work! She stated she really enjoys all the parent involvement on the Policy Council.

Jennifer Wilson stated she agreed with all of the COVID policy updates except she would have preferred the agency keep the mandatory staff vaccination requirement. However, in support of all the hard work that goes into putting policies together she felt it important to approve. She also was hopeful that removing the vaccination mandate would help in filling the more than one hundred open positions. Jennifer also expressed thanks for the journal received.

10. **Next Scheduled Meeting**
   The next scheduled meeting will take place on June 27, 2023 at 5:30 p.m.

11. **Adjournment**
   The meeting was adjourned at 7:04 p.m.