DATE: November 17, 2026
TIME: 12:00 pm
LOCATION: CAPK Administrative Office
Board Room
1300 18th Street., Suite 200
Bakersfield, CA 93301

Board of Directors Meeting Agenda

I. Call to Order

a. Roll Call

Kevin Burton (Chair)	Don Bynum	June Nachor	Janea Roberts
Denise Boshers	Leslie Friend	Fred Plane	Rudy Salas
Michael Bowers	Ariana Joven	Celeste Porter	Chei Whitmore
Lillian Brust	Traco Matthews	Mike Riar	

II. 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 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. Minutes of the September 29, 2026 Board of Directors Meeting – ***Action Item (p. 3-6)***

III. New Business

a.	Financial Reports ***– Action Item (p. 7-13)***	Tracy Webster, Chief Financial Officer
b.	CAPK Foundation Board Chair & Vice Chair Election ***– Action Item (p. 14-15)***	Catherine Anspach, Director of Development
c.	2027 Foundation Board Meeting Calendar ***– Action Item (p. 16)***	Catherine Anspach, Director of Development
d.	Ad Hoc Selection Committee: New Foundation Board Members ***– Action Item (p. 17)***	Leslie Friend, CAPK Foundation Board
e.	CAPK Foundation CY 2027 Budget ***– Action Item (p. 18-31)***	Pritika Ram, Chief Business Development Officer
f.	CAPK Food Bank CY 2027 Fundraising Goal ***– Info Item (p. 32-33)***	Pritika Ram, Chief Business Development Officer
g.	CAPK Foundation Bridge to Opportunity Scholarship Program (Pilot Program) ***– Action Item (p. 34-53)***	Annelisa Corona, Community Development Supervisor

h. Grant and Fund Development ***– Info Item (p. 54)*** — Annelisa Corona, Community Development Supervisor

i. Fundraising Update ***– Info Item (p. 55-61)*** — Catherine Anspach, Director of Development

IV. Board Member and Staff Comments

V. Next Scheduled Meeting

Board of Directors Meeting
12:00 pm
Tuesday, January 26, 2027 (Tentative)
CAPK Administrative Offices, Board Room
1300 18th St., Suite 200
Bakersfield, CA 93301

VI. Adjournment

DATE	September 29, 2026
TIME	12:00 pm
LOCATION	CAPK Administrative Office Board Room 1300 18th Street., Suite 200 Bakersfield, CA 93301

COMMUNITY ACTION PARTNERSHIP OF KERN FOUNDATION
Board of Directors Meeting Minutes

I. Call to Order

Chair Kevin Burton called the meeting to order at 12:08pm at the CAPK Administrative Office, at 1300 18th Street, Bakersfield, CA.

a. Roll Call

Roll Call was taken with a quorum present:

Present: Kevin Burton (Chair), Denise Boshers, Lillian Brust, Leslie Friend (attended virtually), Ariana Joven, Fred Plane, Celeste Porter, Mike Riar (arrived at 12:32pm), & Rudy Salas (arrived at 12:33pm) & Chei Whitmore.

Absent: Michael Bowers, Don Bynum, Traco Matthews, June Nachor & Janea Roberts.

Others Present: Jeremy Tobias, Chief Executive Officer; Pritika Ram, Chief Business Development Officer; Tracy Webster, Chief Financial Officer; Lisa McGranahan, Chief Human Resource Officer; Rebecca Moreno, Director of Housing & Supportive Services; Gabrielle Alexander, Director of Finance; Catherine Anspach, Director of Development; and other CAPK staff.

II. Public Comments

No one addressed the Board.

III. Consent Agenda

A motion was made and seconded to approve the Consent Agenda. Carried by unanimous vote (Joven/Whitmore).

V. New Business

a. Financial Reports – Tracy Webster, Chief Financial Officer – ***Action Item***

Tracy Webster presented the financial reports for January 2026 through August 2026. She first reviewed the contributions by purpose, highlighting the programs and the number of contributions recorded for each.

Kevin Burton asked about the 318 contributions listed for the Food Bank. Tracy explained that the fundraising software sometimes records donations as a unit donation and not always an individual donation, so the actual number of contributions is higher.

Tracy then reviewed the balance sheet, noting that total assets, consisting of principal cash, were $514,227.95. She also presented the income statement, which included the agency contribution. Next, she highlighted the fund activity by purpose, showing how much income was received and how much was distributed to each program. Tracy used Gourmet for Good as an example to help explain the report.
Lastly, she reviewed the budget-to-actual report, which provides a month-by-month breakdown of the Foundation's budget and actual expenses.

A motion was made and seconded to approve the Financial Reports. Carried by unanimous vote (Joven/Brust).

b. Board Chair and Vice Chair Election – Catherine Anspach, Director of Development – ***Action Item***

Catherine Anspach stated that, as the Foundation continues reviewing its policies and procedures, Section 4.5 of the Foundation bylaws requires the election of a new Foundation Board Chair yearly. Catherine explained that an electronic survey would be sent to the Board. She also asked that anyone who does not wish to serve as Chair or Vice Chair notify Foundation staff.

Ariana Joven expressed that she would like to know if anyone is interested in serving as Chair or Vice Chair. Catherine agreed that it was a good discussion to have but noted that, since some Board members were not present at the meeting, it might be best to send out the survey.

Pritika Ram added that the plan was to distribute the survey so the Board could collectively decide who would serve as the new Chair in January 2027. The survey results would be brought back to the November 2026 Foundation Board meeting.

Chei Whitmore asked about the expectations and responsibilities of the Board Chair. Pritika agreed that this was important and stated that the survey would include descriptions of the roles and responsibilities of both the Chair and Vice Chair. Kevin Burton added that serving as Chair of the Foundation Board is not difficult, as Catherine and Lara provide support to the Chair.

A motion was made and seconded to approve the Board Chair and Vice Chair Election. Carried by unanimous vote (Whitmore/Porter).

c. Ad Hoc Committee for Board Member Recruitment – Catherine Anspach, Director of Development – ***Action Item***

Catherine Anspach stated that Foundation staff would like to recruit a few new members for the Foundation Board and are requesting the Board Chair's approval to establish an Ad Hoc Committee. She also invited anyone interested in joining the committee to reach out to her.

Ariana Joven asked if recruitment had already started. Catherine explained that she knows of a few individuals who have expressed interest but have not yet submitted applications. Ariana also asked whether

all current Board members intend to remain on the Board and whether the Ad Hoc Committee would only fill existing vacancies or could recommend adding additional members.

Catherine said this would be a great discussion for the committee. She added that the Board may not necessarily want to reach the maximum membership of 21 but could consider adding three members if they would be a good fit for the Board. Catherine also noted that three-year terms have been added since the last revision of the bylaws.

A motion was made and seconded to approve the Ad Hoc Committee for Board Member Recruitment. Carried by unanimous vote (Joven/Whitmore).

d. Grant and Fund Development – Annelisa Corona, Community Development Supervisor – ***Info Item***

Annelisa Corona shared that her report outlines all the grants pursued by the Foundation team and Community Development to support the agency. Annelisa emphasized the importance of collaboration between both teams to ensure they are not pursuing the same funding opportunities.

She began by highlighting Hunger Action Month, which included a $5,000 grant from Sprouts and a grant from PG&E. For Youth and Community Services, $15,000 was allocated between Friendship House and the VITA program. Kevin Burton asked whether these funds were restricted. Catherine clarified that the funds remain restricted to their designated programs, but each program can use the funds as needed.

Annelisa also discussed a grant application that was not awarded for hygiene kits for the M Street Navigation Center, noting that grant opportunities can include in-kind donations as well. Lastly, Annelisa mentioned a grant opportunity through the U.S. Bank Foundation. After researching the opportunity, it was determined that it would be better suited for CAPK's Grants Team to pursue.

e. Fundraising Update – Catherine Anspach, Director of Development – ***Info Item***

Catherine Anspach began her fundraising report by providing an update on Gourmet for Good, sharing that the event generated net proceeds of $87,775. She highlighted how much each program would receive and explained that the allocations were determined based on each program's needs. She also mentioned an educational scholarship and noted that she would provide more information at the next board meeting.

Catherine then provided an update on the Back-to-School events, sharing that they all went well. She also highlighted the Recycling Drive and Luncheon, which supported Veterans Supportive Services and raised $6,889. Catherine added that Hunger Action Month had wrapped up, including several activities to raise funds for the Food Bank.

Catherine then discussed Stand Down, an upcoming event for Veterans Supportive Services. She also highlighted the upcoming donor event, Taste of Gratitude, which will take place at the Food Bank on Wednesday, November 4. Catherine encouraged board members to invite anyone they feel may be interested in learning more about the Food Bank. She added that if anyone is unable to attend Taste of Gratitude, they are welcome to attend the Food Bank Lunch and Learn event in January 2027.
Catherine also shared that Friendship House will be hosting a music festival on November 14, with sponsorship opportunities available.

f. Program Presentation: Veterans Supportive Services – Rebecca Moreno, Director of Housing & Supportive Services & Raul Jimenez, Program Administrator – ***Info Item***

Catherine Anspach introduced Rebecca Moreno and Raul Jimenez, who provided an overview of CAPK's Veterans Supportive Services (VSS) program, which merged with the California Veterans Assistance Foundation (CVAF).

Raul shared that the program serves veterans experiencing homelessness, those at risk of homelessness, and low-income veteran families. Services include permanent and transitional housing, case management, and access to a staff social worker. CAPK currently serves approximately 188 veterans, with 40 transitional housing beds and 51 permanent housing units. Rebecca added that CAPK is one of the few providers offering housing services to veterans and their families.

Kevin Burton asked whether CAPK partners with Medi-Cal providers to ensure clients receive medical care and medications. Raul explained that new client assessments include reviewing VA benefits, and a VA-supported healthcare navigator helps connect clients with needed services.

Raul shared several ways the Foundation Board could support the program, including donations of pet supplies, clothing, bedding, hygiene products, and meals. Rebecca added that holiday donations, particularly toys for children, would also be appreciated. She thanked the board and invited members to tour the facilities.

Fred asked where donations could be dropped off. Raul provided the VSS office address: 1617 30th Street, Bakersfield, CA. Catherine added that she would also share the information with the board.

VII. Board Member & Staff Comments

Catherine Anspach shared that an electronic survey would be sent out for the Chair and Vice Chair positions. Chei Whitmore asked about board member term limits and the renewal process. Catherine explained that she would include each member's current term information with the survey. She added that all board members signed and renewed their terms in January of 2026.

VIII. Next Scheduled Meeting

Board of Directors Meeting
12:00 pm
Tuesday, November 17, 2026
CAPK Administrative Offices, Board Room
1300 18th Street., Suite 200
Bakersfield, CA 93301

IX. Adjournment

The meeting was adjourned at 12:55 pm.

BOARD MEETING

NOVEMBER 17, 2026

FINANCIAL REPORT

TABLE OF CONTENTS

SECTION		Pages (s)
A.	Contributions by Purpose January 1, 2026 through October 31, 2026	1
B.	Financial Statements as of October 31, 2026	2-3
C.	Fund Activity Summary as of October 31, 2026	4
D.	Budget to Actual as of October 31, 2026	5

Community Action Partnership of Kern Foundation

Contributions by purpose
for the period of 01/01/2026 to 10/31/2026

Purpose	Amount	# Contributions
General	$55,691.26	90
M Street Navigation Center - Homeless Center	$5,298.23	21
Oasis Family Resource Center - Ridgecrest	$37,703.02	38
East Kern Family Resource Center	$29,490.92	21
Volunteer Income Tax Assistance - VITA	$27,030.00	11
Food Bank	$534,133.30	400
Friendship House	$15,015.41	17
Head Start	$7,500.00	1
Hunger Action Month	$485.00	1
Veterans Services	$54,292.00	23
Gourmet for Good 2026	$223,848.34	141
FHCC Car Show 2026	$2,400.00	4
M Street Workforce	$11,265.06	26
Total	$1,004,152.54	794

Community Action Partnership of Kern Foundation

Income Statement
for the period of 01/01/2026 to 10/31/2026

Account Number	Account Name	Amount
Income		
4220	Contributions Income	$497,092.83
4230	Fundraising	$228,198.34
4310	Interest Earned	$9,370.19
4900	CAPK Agency Contribution	$485,375.00
Total Income		$1,220,036.36
Expense		
5105	Salaries	$243,843.97
5205	Benefits	$59,141.38
6105	Local Travel - Staff	$799.51
6110	Local Travel - Board	$282.49
6120	Out of Town Travel - Staff	$5,742.97
6135	Per Diem - Staff	$1,084.25
6150	Vehicle Gasoline	$399.68
6205	Rent/Lease	$14,949.00
6210	Repair/Maintenance/Incidental Alterations	$2,006.72
6235	Utilities	$3,003.03
6305	Office Supplies	$31,507.32
6510	Audit Fees	$1,700.00
6520	Consultant Services	$63,193.18
6525	Software Support/Maintenance	$402.00
6605	Communications	$2,109.50
6610	Postage	$3,468.23
6615	Printing	$5,849.19
6620	Risk Insurance	$32.48
6635	Board Costs	$2,055.47
6645	Tuition/Registration Fees - Staff	$7,217.00
6660	Equipment Rent/Lease	$30,931.13
6675	Outreach	$10,869.28
6685	Meeting Expenses	$868.08
6690	Membership Fees	$2,090.00
6695	Bank Fees	$3,946.33
6715	Licensing/Misc Fees	$257.76
6790	Misc Expense	$81.91
6990	Contribution - CAPK	$538,842.42
7127	Client Incidentals	$23,314.95
7180	Volunteer Costs	$162.27
7910	Facility Use	$5,014.93
9999	Indirect Expense	$39,390.10
Total Expense		$1,104,556.53
Net Income (Loss)		$115,479.83

Community Action Partnership of Kern Foundation

Balance Sheet
as of 10/31/2026

Account Number	Account Name	Amount
Assets		
1000	Checking	$316,178.09
1010	Money Market	$72,732.02
1101	Stripe Payments	$83.39
Total Assets		$388,993.50
Liabilities		
2100	Accounts Payable	$61,915.24
2200	Accrued Expenses	$54,981.91
Total Liabilities		$116,897.15
Equity		
3000	General Fund - Fund Balance	$264,611.04
3101	Food Bank - Fund Balance	$381.10
3103	Volunteer Income Tax Assistance - VITA - Fund Balance	$200.00
3104	Friendship House Community Center - Fund Balance	$921.97
3106	East Kern Family Resource Center - Fund Balance	$5,000.00
3107	Oasis Family Resource Center - Ridgecrest - Fund Balance	$1,000.00
3108	M Street Navigation Center - Homeless Center - Fund Balance	-$148.06
3110	Head Start - Fund Balance	-$2,500.00
3116	M Street Workforce - Fund Balance	$345.54
3117	OFRC - Early Learners Project - Fund Balance	$6,784.76
3118	Gourmet for Good 2027 - Fund Balance	-$14,500.00
3119	Educational Scholarship - Fund Balance	$10,000.00
Total Equity		$272,096.35
Total Liabilities + Total Equity		$388,993.50

Community Action Partnership of Kern Foundation

Fund Activity Summary
for the period of 01/01/2026 to 10/31/2026

Fund	Beginning Balance	Income	Expenses	Net Income (Expense)	Transfer	Net Increase (Decrease)	Ending Balance	[Beginning of Fiscal Year] Balance
General Fund	$145,571.96	$518,989.74	$399,950.66	$119,039.08	$0.00	$119,039.08	$264,611.04	$145,571.96
Food Bank	$15,383.76	$373,882.69	$388,885.35	$-15,002.66	$0.00	$-15,002.66	$381.10	$15,383.76
Volunteer Income Tax Assistance - VITA	$0.00	$32,030.00	$31,830.00	$200.00	$0.00	$200.00	$200.00	$0.00
Friendship House Community Center	$8.00	$15,723.41	$14,809.44	$913.97	$0.00	$913.97	$921.97	$8.00
East Kern Family Resource Center	$0.00	$40,040.10	$35,040.10	$5,000.00	$0.00	$5,000.00	$5,000.00	$0.00
Oasis Family Resource Center - Ridgecrest	$0.00	$22,402.20	$21,402.20	$1,000.00	$0.00	$1,000.00	$1,000.00	$0.00
M Street Navigation Center - Homeless Center	$96.80	$12,983.03	$13,227.89	$-244.86	$0.00	$-244.86	$-148.06	$96.80
Head Start	$10,000.00	$7,500.00	$20,000.00	$-12,500.00	$0.00	$-12,500.00	$-2,500.00	$10,000.00
Veterans Services	$56.00	$20,067.50	$20,123.50	$-56.00	$0.00	$-56.00	$0.00	$56.00
Gourmet for Good 2026	$-14,500.00	$138,237.43	$123,737.43	$14,500.00	$0.00	$14,500.00	$0.00	$-14,500.00
M Street Workforce	$0.00	$18,180.26	$17,834.72	$345.54	$0.00	$345.54	$345.54	$0.00
OFRC - Early Learners Project	$0.00	$10,000.00	$3,215.24	$6,784.76	$0.00	$6,784.76	$6,784.76	$0.00
Gourmet for Good 2027	$0.00	$0.00	$14,500.00	$-14,500.00	$0.00	$-14,500.00	$-14,500.00	$0.00
Educational Scholarship	$0.00	$10,000.00	$0.00	$10,000.00	$0.00	$10,000.00	$10,000.00	$0.00
Total	$156,616.52	$1,220,036.36	$1,104,556.53	$115,479.83	$0.00	$115,479.83	$272,096.35	$156,616.52

Budget to Actual for the period of 01/01/2026 to 10/31/2026

		Current Period (01/01/2026	YTD (01/01/2026 to 10/31/2026)	
Account Number	**Account Name**	**Actual**	**Actual**	**Budget**
Income				
4220	Contributions Income	497,092.83	497,092.83	437,916.70
4230	Fundraising	228,198.34	228,198.34	181,666.70
4310	Interest Earned	9,370.19	9,370.19	0.00
4900	CAPK Agency Contribution	485,375.00	485,375.00	429,479.20
Total Income		**1,220,036.36**	**1,220,036.36**	**1,049,062.60**
Expense				
5105	Salaries	243,843.97	243,843.97	234,039.20
5205	Benefits	59,141.38	59,141.38	81,382.50
6105	Local Travel - Staff	799.51	799.51	1,250.00
6110	Local Travel - Board	282.49	282.49	0.00
6120	Out of Town Travel - Staff	5,742.97	5,742.97	4,166.70
6135	Per Diem - Staff	1,084.25	1,084.25	875.00
6150	Vehicle Gasoline	399.68	399.68	458.30
6205	Rent/Lease	14,949.00	14,949.00	0.00
6210	Repair/Maintenance/Incidental Alterations	2,006.72	2,006.72	0.00
6235	Utilities	3,003.03	3,003.03	3,333.30
6305	Office Supplies	31,507.32	31,507.32	5,000.00
6505	Legal Fees	0.00	0.00	1,250.00
6510	Audit Fees	1,700.00	1,700.00	0.00
6520	Consultant Services	63,193.18	63,193.18	11,250.00
6525	Software Support/Maintenance	402.00	402.00	11,250.00
6605	Communications	2,109.50	2,109.50	1,666.70
6610	Postage	3,468.23	3,468.23	3,750.00
6615	Printing	5,849.19	5,849.19	10,000.00
6620	Risk Insurance	32.48	32.48	41.70
6625	Hiring Costs	0.00	0.00	375.00
6635	Board Costs	2,055.47	2,055.47	4,166.70
6645	Tuition/Registration Fees - Staff	7,217.00	7,217.00	2,083.30
6660	Equipment Rent/Lease	30,931.13	30,931.13	0.00

		Current Period (01/01/2026	YTD (01/01/2026 to 10/31/2026)	
Account Number	**Account Name**	**Actual**	**Actual**	**Budget**
6675	Outreach	10,869.28	10,869.28	108,333.30
6680	Training Expenses	0.00	0.00	416.70
6685	Meeting Expenses	868.08	868.08	2,500.00
6690	Membership Fees	2,090.00	2,090.00	1,250.00
6695	Bank Fees	3,946.33	3,946.33	0.00
6715	Licensing/Misc Fees	257.76	257.76	250.00
6790	Misc Expense	81.91	81.91	2,500.00
6990	Contribution - CAPK	538,842.42	538,842.42	510,416.70
7127	Client Incidentals	23,314.95	23,314.95	833.30
7180	Volunteer Costs	162.27	162.27	208.30
7910	Facility Use	5,014.93	5,014.93	0.00
9999	Indirect Expense	39,390.10	39,390.10	46,015.80
Total Expense		**1,104,556.53**	**1,104,556.53**	**1,049,062.50**
Net Income (Loss)		**115,479.83**	**115,479.83**	**0.10**

MEMORANDUM

To: Board of Directors

From: Catherine Anspach; Director of Development

Date: November 17, 2026

Subject: *Agenda Item 3b: CAPK Foundation Board Chair & Vice Chair Election* – **Action Item**

Board Officer Election

Ariana Joven received 6 votes for Board Chair and 6 votes for Vice Chair. After Foundation staff spoke with Ariana, she respectfully accepted the Vice Chair role and declined the Board Chair role. Denise Boshers finished second for Board Chair and has said she will accept the role.

The election results are attached.

Recommendation: Staff recommend that the Foundation Board approve the election results, with Denise Boshers as Board Chair and Ariana Joven as Vice Chair. The new Chair and the Vice Chair will begin their terms in January 2027.

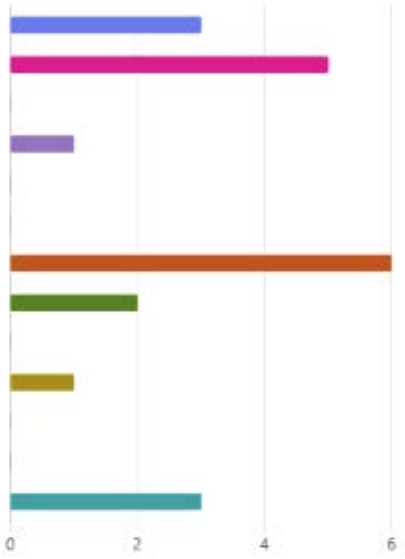
Attachments:
Board Officer Election Results

More Details

2. Foundation Board Chair

More details

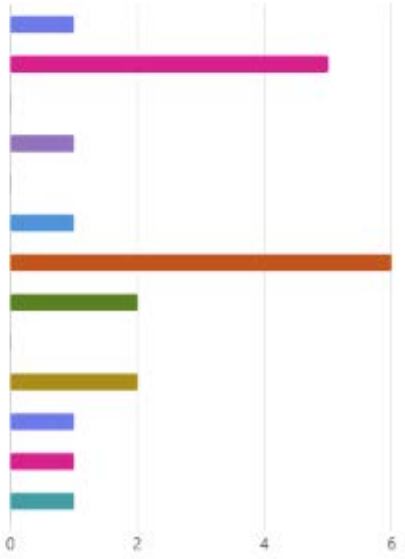
Kevin Burton	3
Denise Boshers	5
Michael Bowers	0
Lillian Brust	1
Don Bynum	0
Leslie Friend	0
Ariana Joven	6
Traco Matthews	2
June Nachor	0
Fred Plane	1
Mike Riar	0
Rudy Salas	0
Chei Whitmore	3



3. Foundation Board Vice Chair

More details

Kevin Burton	1
Denise Boshers	5
Michael Bowers	0
Lillian Brust	1
Don Bynum	0
Leslie Friend	1
Ariana Joven	6
Traco Matthews	2
June Nachor	0
Fred Plane	2
Mike Riar	1
Rudy Salas	1
Chei Whitmore	1



BOARD OF DIRECTORS
2027 BOARD & STANDING COMMITTEE MEETING CALENDAR

MONTH YEAR	EXECUTIVE COMMITTEE	BOARD MEETINGS
TIME	12:00 pm - 1:00 pm	12:00 pm - 1:00 pm
January		01/26
March		03/30
May		05/25
July	7/27	
September		09/28
November		11/16

- Board of Director Meetings and Committee Meetings are generally held at the Community Action Partnership or Kern Administrative Building, located at 1300 18th Street, Bakersfield, CA. Notice of change in meeting location will be given in advance.

Notes:

- November meeting will be a week early due to the Thanksgiving Holiday.
- No Standing Committee or Board meetings are scheduled in July & December.

MEMORANDUM

To: Board of Directors

From: Leslie Friend; CAPK Foundation Board

Date: November 17, 2026

Subject: *Agenda Item 3d: Ad Hoc Selection Committee: New Foundation Board Members* – **Action Item**

New Member Selection

The Ad Hoc Committee met on 10/16 to discuss adding new members. After that meeting, the Ad Hoc Committee decided to move forward with interviewing two candidates who had expressed interest in joining the Board:

- Matthew Cauthron — Adventist Health, Director of Community Integration
- Kaelyn Peterson — Grimmway Produce Group, Director of Strategic Communications and Engagement

The Ad Hoc Committee interviewed both candidates.

On 11/9, the Ad Hoc Committee met, and all agreed to recommend that the Board add both members to the Foundation Board.

Recommendation:

The Ad Hoc Committee recommends that the Foundation Board approve the addition of both Matthew Cauthron and Kaelyn Peterson as members, effective at the January 2027 Foundation Board meeting.

MEMORANDUM

To: CAPK Foundation Board of Directors

From: Pritika Ram, Chief of Business Development Officer

Date: Tuesday, November 17, 2026

Subject: *Agenda Item 3e*: CAPK Foundation CY 2027 Budget - **Action Item**

Background

The Community Action Partnership of Kern (CAPK) Foundation operates on a calendar year, January 1 through December 31. The Foundation raises unrestricted and program-specific funds that sustain and expand CAPK programs and services for families across Kern County through the annual Gourmet for Good event, program-based giving campaigns, end-of-year and spring appeals, employee giving, and community partnerships and sponsorships.

Staff are presenting the proposed CY 2027 operating budget for the Foundation Board's review and approval ahead of the January 1, 2027 start of the budget year.

CY 2027 Operating Budget

The proposed CY 2027 operating budget is $597,106. After applying an estimated $65,280 carryover from CY 2026, the net CY 2027 budget is $531,826, an increase of $16,451 (3.2%) over the CY 2026 budget of $515,375.

Category	CY 2027	Includes
Salaries & Stipends	$318,771	Per personnel budget
Benefits	$110,933	FICA/FICA-Med and benefits
Travel	$6,700	NCAP, CalCAPA, fundraising events
Space Costs	$7,776	Rent/lease
Supplies	$8,850	Office supplies, laptops, hotspots
Contract Services	$22,000	Bloomerang CRM and plug-ins
Other Operating Costs	$58,100	Printing, postage, Board, meetings
Indirect (12%)	$63,976	
Total Operating Budget	**$597,106**	
Less: Estimated CY 2026 Carryover	(65,280)	
Net CY 2027 Budget	**$531,826**	

Notable items in the CY 2027 budget include:

New shared position: A 0.50 FTE Administrative Coordinator is budgeted to the Foundation and shared with the Community Development Division (99905), which funds the remaining 0.50 FTE through its separate budget. The position adds capacity for donor, Board, and operational support.

Donor management: $22,000 is budgeted for the Bloomerang CRM (purchased in October 2026) and plug-ins to strengthen donor tracking, acknowledgments, stewardship, and reporting.

CY 2027 Projected Fundraising

The Foundation projects $831,000 in fundraising directed to CAPK programs in CY 2027:

Source	CY 2025 Actual	Jan–Aug 2026	CY 2027 Projected	Share
Gourmet for Good (annual event, net)	$80,000	$87,775	$105,500	12.7%
Food Bank	$668,645	$416,418	$500,000	60.2%
Ridgecrest FRCs	$8,040	$36,703	$48,000	5.8%
East Kern FRCs	$35,517	$29,490	$35,000	4.2%
FHCC Youth Center	$25,130	$16,093	$30,000	3.6%
Veteran Support Services	$138,413	$40,208	$30,000	3.6%
VITA	$16,202	$26,830	$28,000	3.4%
Head Start	$25,000	$20,000	$20,000	2.4%
M Street	$17,557	$5,193	$15,000	1.8%
Educational Stipend	—	—	$10,500	1.3%
Other Programs	—	$48,711	$9,000	1.1%
Program-based subtotal	$934,504	$639,646	$725,500	87.3%
Total projected fundraising	$1,014,504	$727,421	$831,000	100.0%

Recommendation:

Staff recommend the CAPK Foundation Board of Directors approve the proposed CY 2027 Foundation operating budget of $597,106, for a net CY 2027 budget of $531,826 after applying the estimated CY 2026 carryover of $65,280.

Attachment: CAPK Foundation CY 2027 Budget Development Presentation

CAPK Foundation: CY 2027 Budget Development

PRESENTED BY: CATHERINE ANSPACH

DIRECTOR OF DEVELOPMENT



Program Overview

The CAPK Foundation (601) raises unrestricted and program-specific funds that sustain and expand CAPK programs and services for families across Kern County.

Fundraising includes the annual Gourmet for Good event, program-based giving campaigns (Food Bank, Family Resource Centers, Friendship House Community Center youth programs, M Street, VITA, Head Start, and Veteran Support Services), end-of-year and spring appeals, employee giving, and community partnerships and sponsorships.

The Foundation operates on a calendar-year budget (January 1 – December 31, 2027) and is overseen by the Chief Business Development Officer within the Community Development Division, in partnership with the Foundation Board.



Goals for CY 2027

Fundraising Growth

- Reach $831,000 in projected fundraising directed to CAPK programs
  - Grow Gourmet for Good as the Foundation's signature annual fundraiser $105,500 and raising an additional $725,500 in program-specific fundraising (i.e., Food Bank, FRCs, FHCC, M Street, VITA, Head Start, and Veteran Support Services)
  - Run targeted appeals with Veteran Support Services, housing, and homeless services

Donor Engagement and Stewardship

- Fully implement the Bloomerang CRM for donor tracking, acknowledgments, and reporting
- Execute end-of-year, spring mailer, and employee giving campaigns

Board Development

- Hold five Board meetings with onboarding and training for Board members
- Engage the Board in donor cultivation and partnership building

Operations

- Onboard the shared Administrative Coordinator (0.50 FTE) to support Foundation operations
- Monitor the expense-to-fundraising ratio against Charity Navigator benchmarks

Community Partnerships

- Strengthen partner sponsorships and civic memberships to expand agency visibility



CY 2027 Budget

Major Highlights

- New shared position: a 0.50 FTE Administrative Coordinator is budgeted to the Foundation, shared with the Community Development Division (99905), which funds the other 0.50 FTE.
- Gourmet for Good: projected at $231,000 gross with $125,500 in event costs, including a $7,500 special event consultant, for $105,500 net to CAPK programs.
- Program-based fundraising: $725,50000 projected, led by the Food Bank ($500,000).
- Donor management: $22,000 for the Bloomerang CRM (purchased October 2026) and plug-ins.
- Overall: the proposed CY 2027 operating budget is $597,106, which is 13.7% ($70,531) more than CY 2026 ($515,375). After an estimated $65,280 carry-over from CY 2026, the net CY 2027 need is $531,826.

CY 2027 Operating Budget (601)

Category	CY 2027	% of Total	Includes
Salaries & Stipends	$318,771	54.4%	Refer to Personnel tab
Benefits	$110,933	18.9%	FICA/FICA-Med and benefits
Travel	$6,700	1.1%	NCAP, CalCAPA, fundraising events
Space Costs	$7,776	1.3%	Rent/lease
Supplies	$8,850	1.5%	Office supplies, laptops, hotspots
Contract Services	$22,000	2.0%	Bloomerang CRM and plug-ins
Other Operating Costs	$58,100	9.9%	Printing, postage, Board, meetings
Indirect (12%)	$63,976	10.7%	
Carry-over CY 2026	-65,280		
Total	**$531,826**	**100%**	

$531,826
Proposed CY 2027

+3%
more than CY 2026

CY 2026 budget: $515,375. Gourmet for Good event costs ($125,500) are netted against event revenue and shown on the next slide.

CY 2027 Projected Fundraising

Source	CY 2025 Actual	Jan–Aug 2026	CY 2027 Projected	Share
Gourmet for Good (annual event, net)	$80,000	$87,775	$105,500	12.7%
Food Bank	$668,645	$416,418	**$500,000**	60.2%
Ridgecrest FRCs	$8,040	$36,703	**$48,000**	5.8%
East Kern FRCs	$35,517	$29,490	**$35,000**	4.2%
FHCC Youth Center	$25,130	$16,093	**$30,000**	3.6%
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VITA	$16,202	$26,830	**$28,000**	3.4%
Head Start	$25,000	$20,000	**$20,000**	2.4%
M Street	$17,557	$5,193	**$15,000**	1.8%
Educational Stipend	—	—	**$10,500**	1.3%
Other Programs	—	$48,711	**$9,000**	1.1%
Program-based subtotal	$934,504	$639,646	$725,500	87.3%
Total projected fundraising	$1,014,504	$727,421	$831,000	100.0%

Head Start Jan–Aug 2026 reflects coats only. Other Programs include KCF Farmworker, SCAN Health Plan (Food Bank), and KHS.



Opportunities and Challenges

Opportunities

- Use the Bloomerang CRM to strengthen donor retention, stewardship, and reporting
- Grow Gourmet for Good sponsorships and attendance to increase net proceeds
- Expand program-specific appeals for Veteran Support Services, housing, and homeless services
- Grow workplace giving and recurring donor programs
- Shared Administrative Coordinator adds capacity for donor and Board support

Challenges

- Program-based giving varies year to year (Gov't shutdown spiked giving to FB in FY 2025)
- Corporate giving landscape is changing and diminishing.
- Gourmet for Good event costs ($125,500) reduce net proceeds to programs
- Managing Foundation costs (63.5% of projected fundraising) against Charity Navigator's 70% program-expense benchmark
- Coordinating a shared position across two budgets and sets of priorities

Areas of Focus

- Diversifying revenue beyond a single annual event
- Expanding support and awareness for FHCC through major community campaign
- Board engagement in fundraising and partnership development
- Data-driven donor management and reporting
- Cost efficiency to improve the fundraising-to-expense ratio



Questions?

MEMORANDUM

To: CAPK Foundation Board of Directors

From: Pritika Ram, Chief of Business Development Officer

Date: Tuesday, November 17, 2026

Subject: *Agenda Item 3f*: CAPK Food Bank CY 2027 Fundraising Goal **– Info Item**

Background

The CAPK Food Bank has the largest fundraising goal of any program supported by the CAPK Foundation. The CY 2027 Foundation budget projects $725,500 in program-based fundraising, and the Food Bank's $500,000 goal accounts for 69% of it. Because of the size of this goal, staff is bringing the Food Bank forward as an area of focus for the Foundation Board in CY 2027.

Prior Giving

Food Bank giving has grown steadily, but recent totals were driven by one-time events rather than repeat donors:

Year	Donors	Raised	Note
2023	106	$182,070	Baseline year
2024	183	$316,270	Growth in corporate giving
2025	520	$663,152	Year-end surge: $262,161 from 293 one-time donors in Nov–Dec
2026 (through Nov 10)	143	$548,530	Includes one-time $97,880 grant (CA Assoc. of Food Banks)

Only 53 donors gave in both 2025 and 2026, contributing $338,566 in 2026. Ten corporate donors and four foundations account for most of this amount, while 38 regular individual donors gave about $28,000. Giving is also concentrated: five donors account for 57% of 2026 giving, so the loss of any one major donor would significantly affect results.

CY 2027 Fundraising Gap

Based on proven repeat giving and typical new gifts, staff projects approximately $284,500 in Food Bank giving for CY 2027 without additional effort, leaving a gap of about $215,500 to reach the $500,000 goal.

	Amount
Regular donors (gave in 2025 and 2026), 2026 giving	$338,566
Less: one-time increase (CA Association of Food Banks)	($97,245)
Typical new and one-time gifts (under $20,000)	$43,211
Projected CY 2027 giving without additional effort	**$284,532**
CY 2027 Food Bank fundraising goal	$500,000
Gap to goal	**$215,468**
Proposed Board fundraising goal	**$300,000**
Amount above goal for Food Bank savings	**$84,532**

Proposed Fundraising Goal and Food Bank Savings

Staff proposes that the Foundation Board help raise $300,000 for the Food Bank in CY 2027. This would close the projected gap and build approximately $84,500 in savings for the Food Bank, providing a cushion for years when one-time gifts decline or community need rises, as it did during the late-2025 surge in giving.

Reaching this goal will require Board champions and effective strategies. Areas staff will explore with the Board include:

Corporate sponsorships: Board introductions to local employers to grow the base of corporate sponsors.
Foundation grants: Board connections to family and community foundations.
Individual major donors: Personal asks, Board giving, and hosted events to grow donors giving $1,000 or more.
Donor retention: Board thank-you calls to the 39 recurring donors who gave in 2025 but have not yet given in 2026.

In January 2027, staff will return with a detailed plan for reaching the goal, including Board champion roles, strategies, and timelines.

This is an information item; no action is required at this time. In January 2027, staff will request Board action to adopt the $300,000 Food Bank fundraising goal and strategy.

Note: 2026 figures are year-to-date through November 10, 2026, and do not yet include year-end giving.

MEMORANDUM

To: Board of Directors

From: Annelisa Corona; Community Development Supervisor

Date: November 17, 2026

Subject: *Agenda Item 3g: CAPK Foundation Bridge to Opportunity Scholarship Program (Pilot Program)* – **Action Item**

The CAPK Foundation is proposing the launch of the Bridge to Opportunity Scholarship Program, a one-year pilot program designed to support eligible CAPK clients pursuing higher education, workforce training, certifications, apprenticeships, and other career advancement opportunities. For the 2027 pilot year, the Foundation has allocated $10,500 from proceeds generated through the Gourmet for Good fundraiser to fund seven educational scholarships of $1,500 each. Scholarship funds will help remove financial barriers by supporting expenses such as tuition, books, required supplies, technology, transportation, childcare, and other education-related costs.

The program will operate as a referral-based scholarship opportunity, with CAPK staff identifying and nominating eligible clients who demonstrate educational aspirations, commitment to their goals, and financial need. The initial pilot cycle will be limited to participants served through the Head Start Program. This will allow the Foundation to evaluate the program's effectiveness, outcomes, and overall impact before considering future expansion to other CAPK programs or opening the scholarship opportunity to the broader community.

A structured application and evaluation process has been developed to ensure fairness and transparency. Applications will be reviewed using a scoring rubric that considers educational and career goals, progress toward achieving those goals, financial need, and the anticipated impact of the scholarship. To support implementation of the program, the Foundation is also requesting authorization to establish an Ad-hoc Review Committee. The committee will be responsible for reviewing eligible applications, applying the approved scoring rubric, and providing funding recommendations for final award approval.

As a pilot initiative, the Foundation will conduct a thorough review following the first funding cycle to evaluate overall program impact. Any findings will help inform future funding and program expansion.

Recommendation

Staff recommends that the Board of Directors approve the implementation of the CAPK Foundation Bridge to Opportunity Scholarship Program and the allocation of $10,500 in to support seven educational scholarships during the 2027 pilot year. Staff also recommends that the Board authorize the formation of an Ad-hoc Review Committee to oversee the application review process and provide scholarship award recommendations.

Attachments:
Draft Program Outline

CAPK Foundation Bridge to Opportunity Scholarship Pilot Program

2027

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1. Program Framework and Process

I. Program Summary:

The CAPK Foundation Bridge to Opportunity Scholarship Program provides limited financial assistance to eligible CAPK clients who are beginning, returning to, or completing an education or workforce training pathway. Support may be used for approved costs connected to a degree, certificate, license, vocational program, apprenticeship, continuing education pathway, or other approved learning opportunity that strengthens the participant's education, employment, or economic mobility.

The program is referral-based and is not open to the public. CAPK program leadership will be tasked with identifying clients who may benefit and submitting a referral. The Foundation will invite eligible nominees to apply. A referral does not guarantee an invitation or award. Awards depend on available program funds and approval from the review committee.

For the first cycle, the Foundation will accept referrals from Head Start. Each annual funding notice will identify participating CAPK program(s) so the framework can expand without rewriting the full policy.

II. Program Eligibility:

- Nominee must be an active CAPK Program client served during the current funding notice (i.e. must have received services from a CAPK program within the last 12 months)
- The nominee is at least 18 years old.
- The nominee plans to enroll, is enrolled, or is currently completing an eligible education or training pathway.
- The nominee must be able to provide proof of a Social Security card or Individual Taxpayer Identification Number (ITIN).
- The nominee is not a CAPK Foundation or Governing board member, review committee member, or an immediate family member of a person participating in the selection decision, unless reviewed and approved under CAPK conflict-of-interest requirements.

Eligible Pathway	Description	Examples
College Degree Programs	Enrollment in an accredited associate, bachelor's, master's, or doctoral degree program.	AA, AS, BA, BS, MBA, MSW
Vocational & Trade Programs	Training programs that prepare participants for skilled trades or technical occupations.	HVAC, Electrical, Welding, Automotive Technology, CDL Training
Certificate Programs	Short-term educational programs leading to an industry-recognized or institutional certificate.	Medical Billing, Bookkeeping, Human Resources, IT Support

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Professional Licensure Programs	Education or training required to obtain a professional license.	LVN, RN, Real Estate License, Cosmetology License
Apprenticeships	Earn-and-learn programs combining paid work experience and classroom instruction.	Electrician, Carpenter, Plumber, Sheet Metal Worker
Industry Certifications	Credentialing programs that verify specialized skills or competencies.	CompTIA, CISSP, SHRM-CP, PMP, QuickBooks Certification
Continuing Education & Career Advancement	Courses required to maintain, renew, or expand professional qualifications.	CEUs, Leadership Training, Workforce Development Courses
Adult Education Programs	Educational pathways supporting foundational learning and academic advancement.	GED, High School Diploma Completion, Adult Literacy Programs
English Language Learning	Programs focused on improving English proficiency for educational or employment success.	ESL Courses, English Proficiency Programs
Workforce Development Programs	Job-readiness and career preparation programs that lead to employment opportunities.	Workforce Training, Pre-Apprenticeship Programs, Career Technical Education
Entrepreneurship & Small Business Development	Training designed to support business ownership and self-employment.	Small Business Certificate Programs, Business Startup Training
Other Approved Learning Opportunities	Educational or training opportunities that demonstrate a clear connection to employment, career advancement, or economic mobility.	Specialized Boot Camps, Technology Training, Industry-Specific Workshops

III. Funding Notice

Each cycle, the CAPK Foundation will issue an internal funding notice stating:

- Eligible CAPK Program(s) and target client population.
- Timeline including referral window, application window, award period and expected decision date.
- Total available funding, expected number of awards and award funding caps.
- Required forms and submission method.

IV. Allocation Approach

The Foundation will provide the full Scholarship directly to the recipient before the program begins. The recipient must sign an agreement explaining how the funds can be used.

The recipient must submit proof of enrollment or other documentation by the required deadline. Recipients who do not provide the required documentation may not be eligible for future funding.

V. Reporting & Program Impact Requirement

Scholarship recipients will be required to submit a brief one-page impact report six (6) months after receiving their award. The report should summarize how the scholarship supported their education or training goals, progress achieved, and the overall impact on their career, employment, or economic mobility.

VI. Eligible Expenses

Qualified Ed expenses | Internal Revenue Service
Topic no. 421, Scholarships, fellowship grants, and other grants | Internal Revenue Service

Category	Examples
Tuition and required fees	Tuition and registration fees
Required books and supplies	Course materials, uniforms, tools, basic equipment, school supplies
Required technology	Basic laptop, software, internet access
Transportation	Transit pass, mileage support, fuel assistance
Childcare	Approved care during class, study, clinical, or testing time
Other barrier support	Background check, fingerprinting, physical exam, immunization, document fee

VII. Ineligible Expenses

- Costs already fully paid by another scholarship, grant, employer, public program, refund, or other source.
- General household expenses, debt payments, fines, entertainment, or purchases not connected to the approved pathway.
- Luxury or premium equipment when a reasonable lower-cost option meets the educational need.
- Expenses acquired before the approved eligibility date
- Cash advances or undocumented purchases.

VIII. Application Process

1. Referral Submission:
   CAPK staff discuss the opportunity with the client, obtain permission, and submit a referral.

2. Eligibility Review:
   The Foundation reviews the referral and confirms eligibility for the current funding cycle.

3. Application Invitation:
   Eligible clients receive an application and submission deadline from the Foundation

4. Complete and Submit Application:
   Applicants complete and submit all required materials. Assistance with language access, accommodations, and application guidance is available as needed.

5. Application Review:
   Foundation staff/Ad hoc Committee will review applications for completeness and may request additional information or clarification.

6. Evaluation and Recommendation:
   Complete applications are evaluated using the approved scoring rubric. The review committee may recommend:
   - Full funding
   - Partial funding
   - Waitlist
   - Denial

7. Award Notification:
   Applicants are notified of the final decision in writing.

8. Award Acceptance:
   Selected applicants receive an award notice outlining the approved amount, payment method, required documents, award period, impact essay requirement, and deadline to sign the Recipient Agreement.

IX. Timeline

Phase	Timeline	Key Activities
Program Launch	January 21, 2027	Announce scholarship funding opportunity to CAPK staff and participating programs. Provide eligibility criteria, referral procedures, and funding cycle deadlines.
Referral Period	January 21, 2027 – February 28, 2027	CAPK staff identify potential candidates, discuss the opportunity with clients, obtain consent, and submit referrals to the CAPK Foundation.
Eligibility Review & Application Invitation	March 1-21, 2027	Foundation staff review referrals and determine eligibility. Eligible clients receive an invitation to apply, application materials, and submission instructions.

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Application Submission Period	March 22 – April 19, 2027	Invited applicants complete and submit applications and required supporting documentation.
Application Review & Recommendation	April 20-27 2027	Foundation staff and/or the Ad Hoc Review Committee review applications for completeness and request additional documentation or clarification when necessary. Complete applications are scored using the approved rubric and recommendations are made for funding.
Award Decisions & Notifications	May 3, 2027	Final funding decisions are approved and applicants are notified.
Award Acceptance	May - June 2027	Selected recipients sign Recipient Agreements and submit any required enrollment, cost, payment, or verification documents.
Scholarship Disbursement	June - July 2027	Approved scholarship funds are issued according to the Foundation's payment procedures.

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2. CAPK Program Referral Form

CAPK Program Information

1. CAPK program and site:

   _____

2. Referring staff member's name and email:

   _____

Client Information

3. Client's full name:

   _____

4. Client's Phone number and email:

   _____

5. Preferred language

   _____

6. Preferred way to be contacted
   - ❑ Phone
   - ❑ Email
   - ❑ Text
   - ❑ Mail

Referral Information

7. Is the client currently receiving or have received services from your CAPK program in the last twelve months?
   - ❑ Yes
   - ❑ No
   - ❑ Other _____
8. What type of education or training is the client interested in?
   - ❑ College
   - ❑ Vocational or career training
   - ❑ Apprenticeship
   - ❑ Certificate or licensing program
   - ❑ Other: _____
9. Briefly explain why you are referring this client for the Scholarship Program:

   _____

10. Is there a deadline the Foundation should know about?
    - ❑ No
    - ❑ Yes (Please explain_____)

Staff Confirmation

I confirm that the individual named above is a CAPK client and has agreed to be contacted by the CAPK Foundation regarding this opportunity.

Signature:_____ Date:_____

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3. Nominee Application

CAPK Foundation Educational Scholarship Application

Section 1: About You

1. Full legal name:
   _____
2. Date of birth:
   _____
3. Phone Number:
   _____
4. Email address:
   _____
5. Mailing address:
   _____
6. Preferred language:
   _____
7. What is the best way to contact you?
   - ❑ Phone
   - ❑ Email
   - ❑ Text
   - ❑ Mail

Section 2: Your Education or Training

8. What type of education or training are you pursuing?
   - ❑ College degree
   - ❑ Vocational or career training
   - ❑ Certificate program
   - ❑ Licensing program
   - ❑ Apprenticeship
   - ❑ Other: _____
9. What program, degree, certificate, license, or trade are you pursuing?
   _____
10. What is your current status?
    - ❑ I have not yet applied
    - ❑ I have applied
    - ❑ I have been accepted
    - ❑ I am enrolled
    - ❑ I am currently attending
    - ❑ I am close to completing my program
11. When does your program begin and when do you expect to complete it?
    Start date: _____
    Expected completion date: _____
12. Please provide the school or training provider's information.
    Address: _____

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Website: _____
Contact person, if known: _____
Phone or email, if known: _____

Section 3: Applicant Statement (Maximum One Page)

Please describe your educational or career goals and how this scholarship will help you achieve them. In your response, address the following:

- What education, training, degree, certificate, or career advancement are you pursuing, and what do you hope to accomplish?
- What steps have you already taken toward achieving this goal (such as applying, enrolling, completing coursework, meeting with an advisor, or applying for financial aid)?
- What is your plan for successfully completing your education or training program?
- Why do you need financial assistance at this time?
- How would receiving this scholarship impact your ability to continue or complete your education or training, and what challenges might you face if you do not receive support?

(Upload document/attach)

Section 4: Other Financial Assistance and Funding Sources

1. Please identify your primary source of income:
   ☐ Full-time employment
   ☐ Part-time employment
   ☐ Self-employment
   ☐ Unemployment benefits
   ☐ Public assistance (CalWORKs, SSI, etc.)
   ☐ Retirement/Pension
   ☐ Financial support from family or others
   ☐ Other: _____

2. List any financial aid, scholarships, grants, employer support or other funding requested or received.

Funding Source/Name	Applied	Approved	Amount
	❑	❑	$
	❑	❑	$
	❑	❑	$

Section 5: Applicant Certification and Consent

Please read each statement and sign below to confirm that you understand and agree.

I. I confirm that the information in this application is true and complete to the best of my knowledge.
II. I understand that submitting an application does not guarantee that I will receive an award.

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III. If selected, I agree to provide documents needed to confirm my enrollment, educational costs, use of funds, and progress.

IV. I give the CAPK Foundation permission to verify my enrollment, costs, payments, and progress with the school or training provider listed in this application.

V. I will notify the CAPK Foundation if my enrollment, costs, financial aid, contact information, or ability to continue the program changes.

VI. I understand that funds must be used only for approved education or training expense

VII. I understand that educational assistance could affect my taxes, financial aid, or public benefits. CAPK does not provide tax, legal, financial aid, or benefits advice.

VIII. I authorize the CAPK Foundation to use my name, photo, testimonial, and success story in Foundation communications, publications, and promotional materials to highlight the impact of this scholarship program.

Required Attachments Checklist

- ❑ Acceptance or enrollment proof
- ❑ Program or class schedule (OPTIONAL)
- ❑ Financial aid information, if applicable
- ❑ Other documentation requested by Foundation

Applicant Signature: _____

Date: _____

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4. Scoring Rubric

Review Committee Scoring Rubric (100 Points)

Criteria	Points
Educational & Career Goals	25
Progress Toward Goal	25
Financial Need	30
Impact of Scholarship	20
Total	**100**

Educational & Career Goals (0-25 points)
Does the applicant clearly explain what they want to achieve and why?

- 21-25: Very clear and well-defined goals
- 11-20: Goals are mostly clear
- 1-10: Goals need more explanation
- 0: Not addressed

Progress Toward Goal (0-25 points)
Has the applicant taken steps toward their education or training goal?
Examples: Applied, accepted, enrolled, completed coursework, sought financial aid, met with an advisor.

- 21-25: Strong evidence of commitment and progress
- 11-20: Some progress demonstrated
- 1-10: Limited progress shown
- 0: No progress demonstrated

Financial Need (0-30 points)
Does the applicant demonstrate a need for financial assistance? Consider income source, existing aid, and financial barriers.

- 25-30: Significant financial need
- 15-24: Moderate financial need
- 1-14: Limited financial need demonstrated
- 0: Need not explained

Impact of Scholarship (0-20 points)
How much will the scholarship help the applicant continue or complete their program?

- 16-20: Scholarship would have a major impact
- 8-15: Scholarship would provide meaningful support
- 1-7: Limited impact described
- 0: Impact not explained

Funding Recommendation

Score	Recommendation
85-100	Highly Recommended
70-84	Recommended
60-69	Consider if Funds Available
Below 60	Not Recommended

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5. Program Policy and Procedures

I. Purpose

This policy provides a consistent process for reviewing, awarding, managing, and closing educational Scholarships provided by the CAPK Foundation. Program details including available funding, participating CAPK programs, award amounts, eligible education pathways, and application dates will be established for each funding cycle and included in the approved program guidelines.

II. Roles and Responsibilities

Role	Responsibilities
CAPK Foundation	• Manage the referral and application process • Confirm that applications are complete • Coordinate application review and award decisions • Prepare award notices and Recipient Agreements • Coordinate payments with Finance • Monitor recipient progress • Maintain program records • Track and report program results
Participating CAPK program	• Identify and refer eligible CAPK clients • Receive the client's permission before submitting a referral • Confirm that the individual is a CAPK client • Provide accurate referral information • Assist with follow-up when appropriate
Ad-Hoc Review Committee	• Review complete applications using the approved evaluation criteria. • Apply the same criteria to each applicant • Disclose possible conflicts of interest • Document the funding award recommendations
Finance	• Confirm that funds are available • Process approved payments • Maintain required financial records • Assist with payment reconciliation and award closeout
Recipient	• Sign the Recipient Agreement • Use the award only for approved expenses • Notify the Foundation of important changes • Must submit a one-page impact report six months after receiving their scholarship award.

III. Referral and Application Procedure

1. The Foundation will provide referral instructions to participating CAPK programs.
2. CAPK staff will discuss the opportunity with the client and receive permission to submit a referral.
3. The Foundation will review the referral and confirm that the client meets the requirements for the current funding cycle.
4. Eligible clients will receive an application and submission deadline.
5. Foundation staff will review applications for completeness and may request missing information or clarification.
6. Complete applications will move forward for review.

Applicants may receive reasonable assistance with language access, accommodations, or understanding the application. Staff should not complete the applicant's personal responses for them.

IV. Application Review and Award Decision

Applications will be reviewed using the approved scoring rubric. Reviewers must disclose any possible conflict of interest and step away from the review when required.

The review committee will recommend:

- Full funding
- Partial funding
- Placement on a waitlist
- Denial

All awards are subject to available funding and final approval. The Foundation will notify applicants of the decision in writing. Selected applicants will receive an award notice explaining:

- The approved amount
- Payment method
- Required documents
- Summary impact essay
- Award period
- Deadline to sign the Recipient Agreement

V. Recipient Agreement

Each selected applicant must sign a Recipient Agreement before receiving funds.
The agreement will include:

- The approved award amount
- Payment method
- W-9 Form
- CAPK Vendor form

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VI. Payment Process

Funds will not be disbursed until the Recipient Agreement has been signed and all required enrollment, cost, and payment documentation has been verified. Scholarship awards will be issued using the payment method approved for the current funding cycle, which may include a one-time payment for the full approved award amount.

VII. Confidentiality and Recordkeeping

Applications and supporting documents will be stored in an approved secure location. Access will be limited to staff and reviewers who need the information to manage the program.
A recipient's name, photograph, quote, or personal story will not be used for fundraising or publicity without separate written permission.

VIII. Nondiscrimination and Accessibility

The program will be administered consistently with CAPK's approved nondiscrimination and accessibility policies and applicable law. Reasonable language access and disability-related accommodation will be provided in the application and reporting process as required. Final language should be reviewed against current CAPK policy before publication.

IX. Appeals and Reconsideration

An applicant may request reconsideration if they believe:

- Important information was reviewed incorrectly
- A conflict of interest affected the decision
- The approved review process was not followed

The request must be submitted within 10 business days of the decision notice. A request cannot be based only on disagreement with the award decision. Reconsideration does not guarantee funding and remains subject to available funds.

X. Reporting & Program Impact Requirement

Scholarship recipients will be required to submit a brief one-page impact report six (6) months after receiving their award. The report should summarize how the scholarship supported their education or training goals, progress achieved, and the overall impact on their career, employment, or economic mobility.

XI. Annual Program Review

After each cycle, the Foundation will summarize referrals, applications, awards, payment categories, persistence, completion, credentials, closures, unspent funds, recipient feedback, and implementation issues. Leadership will use the review to approve changes for the next cycle.

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6. Recipient Agreement **(Foundation will fill in all blank info areas)**

This agreement explains the educational Scholarship awarded to the recipient named below. It becomes effective after it is signed by the recipient and an authorized CAPK Foundation representative.

1. Recipient and Award Information

Recipient's full legal name:

_____

School or training provider:

_____

Education or training program:

_____

Award period:

_____

Maximum award amount: $_____

2. Approved Budget and Payment Plan

The award may be used only for the expenses listed below.

Approved Expense	Maximum Amount	Payment Made To	Payment Date or Timing	Required Documents
	$			
	$			
	$			
Total	$			

Payment method:

- ❑ Upfront payment to the recipient
- ❑ Other: _____

4. Recipient Responsibilities

By signing this agreement, the recipient agrees to:

- Use the award only for the approved education or training program and expenses
- Provide accurate enrollment, cost, payment, and progress information
- Notify the Foundation if there is a change to enrollment, attendance, program costs, financial aid, contact information, or ability to continue
- Contact the Foundation as early as possible if a barrier may prevent continued participation

6. Permission to Verify Information

The recipient gives the CAPK Foundation permission to contact the school, training provider, or approved vendor to confirm:

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- Enrollment or participation
- Program costs
- Educational or training progress
- Program completion

The Foundation will request only the information needed to manage the award.
This permission will end one year after the award period unless the recipient cancels it earlier in writing.

7. Changes to the Award
The recipient must receive written approval before using funds for a different school, program, or expense. The Foundation may withdraw the award if:

- Required documents are not submitted
- The recipient withdraws or stops participating
- Information provided by the recipient is significantly inaccurate
- Funds are used for an unapproved purpose
- The recipient does not meet the terms of this agreement

When appropriate, the Foundation will contact the recipient and provide an opportunity to explain the situation or submit missing information before making a final decision.

9. Taxes, Financial Aid, and Benefits
This award may affect the recipient's taxes, financial aid, or public benefits. The CAPK Foundation does not provide tax, legal, financial aid, or benefits advice. The recipient is responsible for seeking guidance and reporting the award when required.

10. Privacy and Publicity
Information collected through this program may be used to manage payments, monitor progress, evaluate the program, complete audits, and meet reporting requirements.
The Foundation may report combined or de-identified program results.
The recipient's name, photograph, quote, or personal story will not be used for fundraising or publicity without separate written permission.

11. No Employment or Service Requirement
This award does not create an employment relationship with CAPK or the CAPK Foundation.
The recipient is not required to work for CAPK, volunteer, promote the Foundation, or provide a testimonial in exchange for the award.

12. Changes to This Agreement
Any change to the approved award amount, expenses, payment plan, or other terms must be made in writing and approved by the CAPK Foundation.

13. Signatures
Please read this agreement and sign below to confirm that you understand and agree to its terms.
Recipient name: _____
Recipient signature: _____

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Date: _____
Parent or guardian name, if required:

_____
Parent or guardian signature, if required:

_____
Date: _____

CAPK Foundation representative:
Signature: _____
Date: _____

Internal Approval, if Required
Finance or CFO approval:
Signature: _____
Date: _____

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Grants Report September 2026 -October 2026

Year	Project	Funder name	Funder Type	Opportunity name	Status	Amount requested	Amount awarded	Notes
FY 2027	Health & Nutrition Services	The Albertsons Companies Foundation	corporate	Nourishing Neighbors - Hunger Is Campaign	Awarded - Active	$26,000.00	$26,000.00	The CAPK Food Bank is requesting $26k to fund a website and media campaign on SNAP benefits and the effects of HR-1.
FY 2027	Housing & Supportive Services	Commonspirit Health	private	Community Health Improvement Grant	Abandoned	$20,000.00		Revisit grant next year. Need to find dental professionals to assist with project. Project will address unmet oral health needs among adults experiencing homelessness at M Street Navigation Center in Bakersfield. Many face barriers to preventive and routine dental care, including lack of insurance, limited finances, and missing documents needed for health coverage.
FY 2027	Foundation	Elks Lodge	private	Beacon Grant Award	LOI Submitted	$7,500.00		To support the OFRC purchase 1 year wort of shelf stable milk monthly for its pantry serving more than 2,500 individuals, including over 1,300 children.
FY 2027	Foundation	Bakersfield West Rotary Stroope Family Foundation	private	Bakersfield West Rotary Community Grant	Application Submitted	$2,500.00		To support the Oasis Family Resource centers continue serving communities in East kern that are geographically isolated with crucial services such as emergency food, clothing and family/youth educational services.
FY 2027	Foundation	Bakersfield West Rotary Stroope Family Foundation	private	Bakersfield West Rotary Community Grant	Application Submitted	$2,500.00		To support the East Kern Family Resource center continue serving communities in East kern that are geographically isolated with crucial services such as emergency food, clothing and family/youth educational services.
FY 2027	Foundation	Elks Lodge	private	Freedom Grant	LOI Submitted	$1,000.00		To support the Veterans and Supportive Services program with providing winter gear, hygiene and pet supplies to the homeless veterans served through the program.
FY 2027	Foundation	C.A.R.E.S for Kids	private	C.A.R.E.S. For Kids Fall funding cycle	Declined	$5,000.00		The Foundation is requesting $5,000 from C.A.R.E.S. for Kids to purchase educational supplies for children ages 0-5 served through the OFRC's case management services and Summer Bridge program. These materials will support hands-on learning, encourage parent-child interaction, and help children develop important early childhood skills.
FY 2027	Community Development	Ross Stores Foundation	private	Regional Giving	LOI Submitted	$30,000.00		Funds will support a 12-month workforce development pilot at CAPK's Shafter Youth Center, providing four industry-focused career fairs and job readiness training to help economically disadvantaged youth ages 16-24 prepare for employment.

FUNDRAISING

Overview

capk FOUNDATION





TASTE of GRATITUDE

capk FOOD BANK

DONOR APPRECIATION RECEPTION

November 6, 2026








Head Start
A Program of CAPK
Winter Coat Drive
DISTRIBUTION & PHOTO OP
Thursday, November 19, 2026
9:00am-10:00am
FAIRFAX HEADSTART
1500 S. Fairfax Rd,
Bakersfield, CA 93307
SPONSORED BY
Chevron
CALIFORNIA RESOURCES CORPORATION
KERN ENERGY
We Fuel the Future


LIFTING
US UP!



HOLIDAY

Food Distributions

Tuesday, November 24, 2026

THANKSGIVING DISTRIBUTION

Tuesday, December 23, 2026

CHRISTMAS DISTRIBUTION

10:00AM - 12:00PM

15662 K Street, Mojave, CA

capk East Kern Family Resource Center



M STREET
NAVIGATION
CENTER

Holiday Meals





Thursday, November 26, 2026

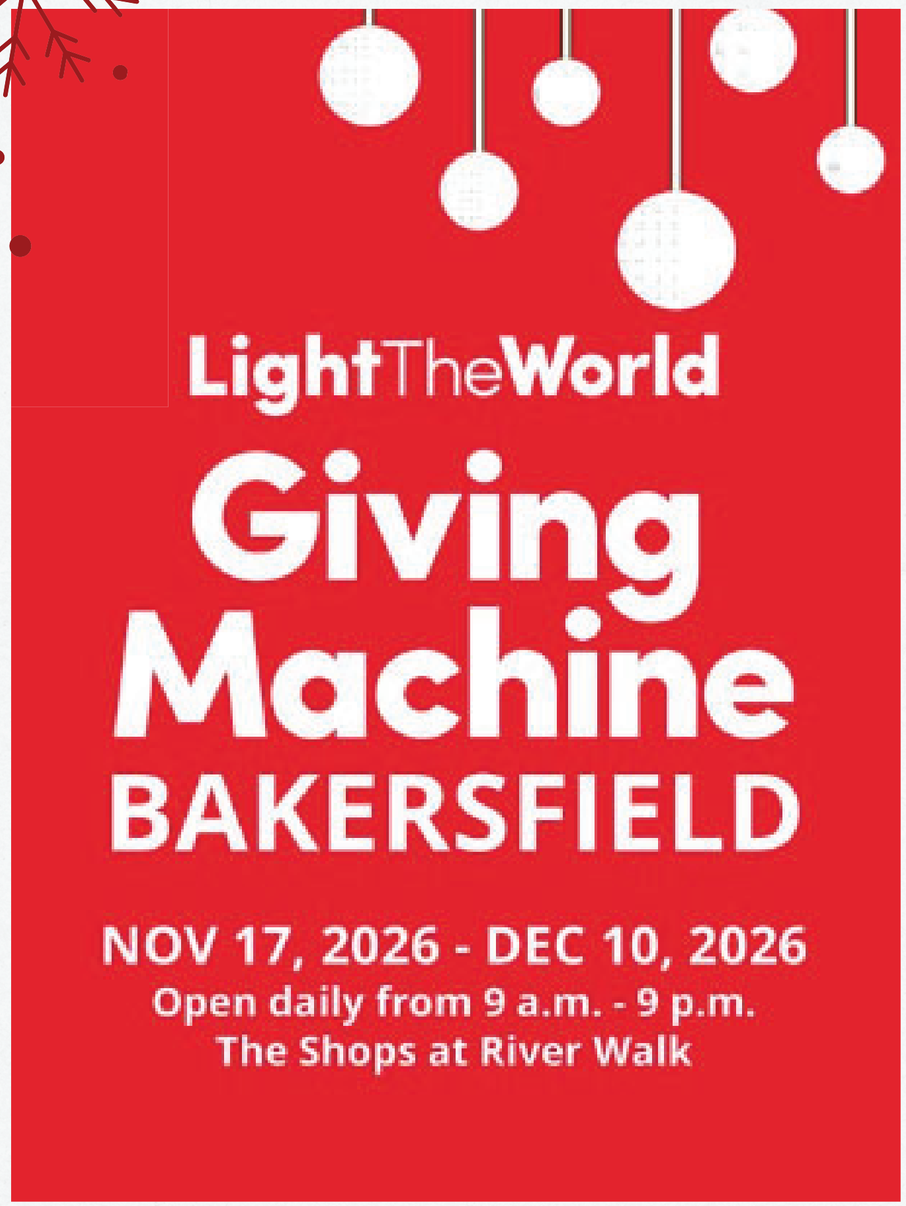
THANKSGIVING MEAL

Tuesday, December 15, 2026

CHRISTMAS MEAL

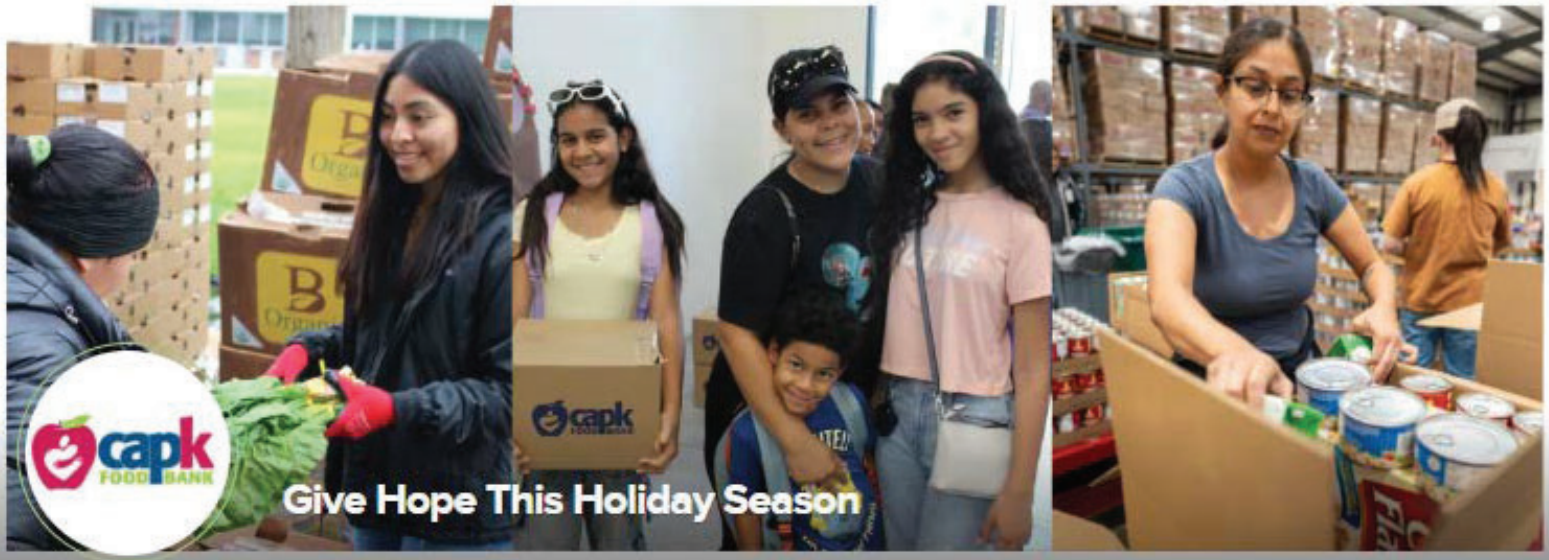
11:30am-1:30pm

2900 M Street, Bakersfield





Giving Machines are vending machines that allow you to donate to local charities. The CAPK Food Bank is one of 5 charities that have been selected in Kern County. Last year, the campaign, which is a nationwide campaign run by the Church of Latter Day Saints raised $14,000 for our Food Bank.



Share on Facebook

Share on X



Help Put Food on the Table for Kern County Families

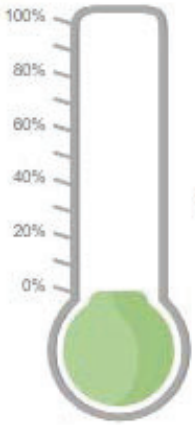
Across Kern County, more working families, seniors, and individuals are struggling to keep food on the table as the cost of groceries, housing, and everyday expenses continues to rise. For many, asking for food assistance is something they never expected to do.

Your generosity makes a difference. When you give to the CAPK Food Bank, you help provide food and hope to families, children, seniors, and veterans throughout our community.

Every gift, no matter the size, helps ensure our neighbors have access to the food they need.

Give today and help make sure no neighbor goes hungry.

Thank you for helping build a stronger, healthier Kern County!



$5.20
achieved

$75,000.00
goal

0%
of your goal reached

Donate Now

Register Now to Fundraise

Give Hope This Holiday Season Leaderboard

Individuals

There are currently no leaders.

View Full Leaderboard

Recent Activity

Lara Popkin donated $5.20 to **Give Hope This Holiday Season**
Share:

Our Newest Participants

View All