

DRAFT 2026/2027
Community Needs Assessment and
Community Action Plan

Community Action Partnership of
Orange County (CAP OC)



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Introduction

The Department of Community Services and Development (CSD) has developed the 2026/2027 Community Needs Assessment (CNA) and Community Action Plan (CAP) template for the Community Services Block Grant (CSBG) Service Providers network. CSD requests agencies submit a completed CAP, including a CNA, to CSD on or before **June 30, 2025**. Changes from the previous template are detailed below in the “What’s New for 2026/2027?” section. Provide all narrative responses in 12-point Arial font with 1.15 spacing. A completed CAP template 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 confirm that they are in compliance. Signature of the board chair and executive director on the Cover Page certify compliance with the Federal CSBG Programmatic Assurances.

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 is provided in this template. CSBG agencies should review these assurances and confirm that they are in compliance. Signature of the board chair and executive director on the Cover Page certify compliance with the State Assurances.

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 the Organizational Standards. A list of Organizational Standards that are met by an accepted CAP, including a CNA, are 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 2026/2027?

Due Date. The due date for your agency's 2026/2027 CAP is June 30, 2025. However, earlier submission of the CSBG Network's CAPs will allow CSD more time to review and incorporate agency information in the CSBG State Plan and Application. CSD, therefore, requests that agencies submit their CAPs on or before May 31, 2025.

ROMA Certification Requirement. CSD requires that agencies have the capacity to provide their own ROMA, or comparable system, certification for your agency's 2026/2027 CAP. Certification can be provided by agency staff who have the required training or in partnership with a consultant or another agency.

Federal CSBG Programmatic and State Assurances Certification. In previous templates, the federal and state assurances were certified by signature on the Cover Page and by checking the box(es) in both federal and state assurances sections. In the 2026/2027 template, CSD has clarified the language above the signature block on the Cover Page and done away with the check boxes. Board chairs and executive directors will certify compliance with the assurances by signature only. However, the Federal CSBG Programmatic Assurances and the State Assurances language remain part of the 2026/2027 template.

Other Modifications. The title page of the template has been modified to include your agency's name and logo. Please use this space to brand your agency's CAP accordingly. CSD has also added references to the phases of the ROMA Cycle i.e. assessment, planning, implementation, achievement of results, and evaluation throughout the 2026/2027 template. Additionally, there are a few new questions, minor changes to old questions, and a reordering of some questions.

Checklist

- Cover Page
- Public Hearing Report

Part I: Community Needs Assessment Summary

- Narrative
- Results

Part II: Community Action Plan

- Vision and Mission Statements
- Causes and Conditions of Poverty
- Tripartite Board of Directors
- Service Delivery System
- Linkages and Funding Coordination
- Monitoring
- ROMA Application
- Federal CSBG Programmatic Assurances
- State Assurances
- Organizational Standards

Part III: Appendices

- Notice of Public Hearing
- Low-Income Testimony and Agency's Response
- Community Needs Assessment

Cover Page

Agency Name:	Community Action Partnership of Orange County
Name of CAP Contact:	Alexander Caro
Title:	Senior Planning Manager
Phone:	(724)392-1794
Email:	Acaro@capoc.org

Date Most Recent CNA was Completed: (Organizational Standard 3.1)	PENDING
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Board and Agency Certification

The undersigned hereby certifies that this agency will comply with the [Federal CSBG Programmatic Assurances \(CSBG Act Section 676\(b\)\)](#) and [California State Assurances \(Government Code Sections 12747\(a\), 12760, and 12768\)](#) for services and programs provided under the 2026/2027 Community Needs Assessment and Community Action Plan. The undersigned governing body accepts the completed Community Needs Assessment. (Organizational Standard 3.5)

Name: PENDING		Name: PENDING	
Title:	Executive Director	Title:	Board Chair
Date:	Pending	Date:	Pending

ROMA Certification

The undersigned hereby certifies that this agency's Community Action Plan and strategic plan document the continuous use of the Results Oriented Management and Accountability (ROMA) system or comparable system (assessment, planning, implementation, achievement of results, and evaluation). (CSBG Act 676(b)(12), Organizational Standard 4.3)

Name:	Alexander Caro
ROMA Title:	Nationally Certified ROMA Trainer (NCRT)
Date:	PENDING

CSD Use Only

Dates CAP		Accepted By
Received	Accepted	

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. Testimony presented by low-income individuals and families during the public hearing shall be identified in the final CAP.

Guidelines

Notice of Public Hearing

1. Notice of the public hearing should be published at least 10 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 should 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 10 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 should be made available for public review and inspection approximately 30 days prior to the public hearing. The draft CAP may 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 in Part III: Appendices as Appendix A.

Public Hearing

1. Agencies must conduct at least one public hearing on the draft CAP.
2. Public hearing(s) must be held in the designated CSBG service area(s).
3. Low-income testimony presented at the hearing or received during the comment period should be memorialized verbatim in the Low-Income Testimony and Agency's Response document and appended to the final CAP as Appendix B in Part III: Appendices.
4. The Low-Income Testimony and Agency's Response document should include the name of low-income individual, his/her 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

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 based on community need at the time of the hearing.

Public Hearing Report

Date(s) the Notice(s) of Public Hearing(s) was/were published	April 5, 2025- May 7, 2025
Date Public Comment Period opened	April 21, 2025
Date Public Comment Period closed	May 23, 2025
Date(s) of Public Hearing(s)	May 7, 2025
Location(s) of Public Hearing(s)	CAP OC Headquarters, 11870 Monarch Street Garden Grove, CA 92841. Pending live stream locations.
Where was the Notice of Public Hearing published? (agency website, newspaper, social media channels)	Agency website, CAP OC social media channels (PENDING direct social media channels), OC Register, Nguiot Viet, in-person at the following locations: CAP OC's headquarters, OC Food Bank (offices), Energy and Environmental Services (EES) department lobby, CAP OC's (3) community centers.
Number of attendees at the Public Hearing(s)	PENDING FINAL PUBLIC HEARING REPORT

Part I: Community Needs Assessment Summary

CSBG Act Section 676(b)(11)

California Government Code Section 12747(a)

Helpful Resources

A community needs assessment provides a comprehensive “picture” of the needs in your service area(s). Resources are available to guide agencies through this process.

- CSD-lead training – “Community Needs Assessment: Common Pitfalls and Best Practices” on Tuesday, September 10, 2024, at 1:00 pm. [Registration is required](#). The training will be recorded and posted on the Local Agencies Portal after the event.
- Examples of CNAs, timelines, and other resources are on the [Local Agencies Portal](#).
- [Community Action Guide to Comprehensive Community Needs Assessments](#) published by the National Association for State Community Service Programs (NASCSPP).
- [Community Needs Assessment Tool](#) designed by the National Community Action Partnership (NCAP).
- National and state quantitative data sets. See links below.

Sample Data Sets		
U.S. Census Bureau Poverty Data	U.S. Bureau of Labor Statistics Economic Data	U.S. Department of Housing and Urban Development Housing Data & Report
HUD Exchange PIT and HIC Data Since 2007	National Low-Income Housing Coalition Housing Needs by State	National Center for Education Statistics IPEDS
California Department of Education School Data via DataQuest	California Employment Development Department UI Data by County	California Department of Public Health Various Data Sets
California Department of Finance Demographics	California Attorney General Open Justice	California Health and Human Services Data Portal
CSD Census Tableau Data by County		Population Reference Bureau KidsData
Data USA National Public Data	National Equity Atlas Racial and Economic Data	Census Reporter Census Data

Sample Data Sets

Urban Institute SNAP Benefit Gap	Race Counts California Racial Disparity Data	Rent Data Fair Market Rent by ZIP
UC Davis Center for Poverty & Inequality Poverty Statistics	University of Washington Center for Women's Welfare California Self-Sufficiency Standard	University of Wisconsin Robert Wood Johnson Foundation County Health Rankings
Massachusetts Institute of Technology Living Wage Calculator	Nonprofit Leadership Center Volunteer Time Calculator	Economic Policy Institute Family Budget Calculator

Narrative

CSBG Act Section 676(b)(9)

Organizational Standards 2.2, 3.3

ROMA – Assessment

Based on your agency's most recent CNA, please respond to the questions below.

1. 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.

PENDING 2025 CNA Report to be completed in May 2025.

2. Indicate from which sources your agency collected and analyzed quantitative data for its most recent CNA. (Check all that apply.) (Organizational Standard 3.3)

Federal Government/National Data Sets

- Census Bureau
- Bureau of Labor Statistics
- Department of Housing & Urban Development
- Department of Health & Human Services
- National Low-Income Housing Coalition
- National Equity Atlas
- National Center for Education Statistics
- Academic data resources
- Other online data resources
- Other

Local Data Sets

- Local crime statistics
- High school graduation rate
- School district school readiness
- Local employers
- Local labor market
- Childcare providers
- Public benefits usage
- County Public Health Department
- Other

California State Data Sets

- Employment Development Department
- Department of Education
- Department of Public Health
- Attorney General
- Department of Finance
- Other

Surveys

- Clients
- Partners and other service providers
- General public
- Staff
- Board members
- Private sector
- Public sector
- Educational Institutions
- Other

Agency Data Sets

- Client demographics
- Service data
- CSBG Annual Report
- Client satisfaction data
- Other

3. Indicate the approaches your agency took to gather qualitative data for its most recent 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

Interviews

- Local leaders
- Elected officials
- Partner organizations' leadership
- Board members
- New and potential partners
- Clients

Focus Groups

- Local leaders
- Elected officials
- Partner organizations' leadership
- Board members
- New and potential partners
- Clients
- Staff

 Community Forums **Asset Mapping** **Other**

4. Confirm that your agency collected and analyzed information from each of the five community sectors below as part of the assessment of needs and resources in your service area(s). Your agency must demonstrate that all sectors were included in the needs assessment by checking each box below; a response for each sector is required. (CSBG Act Section 676(b)(9), Organizational Standard 2.2)

Community Sectors

- Community-based organizations
- Faith-based organizations
- Private sector (local utility companies, charitable organizations, local food banks)
- Public sector (social services departments, state agencies)
- Educational institutions (local school districts, colleges)

Results

CSBG Act Section 676(b)(11)
 California Government Code Section 12747(a)
 Organizational Standards 4.2
 State Plan Summary and Section 14.1a
 ROMA – Planning

Based on your agency’s most recent CNA, please complete Table 1: Needs Table and Table 2: Priority Ranking Table.

Table 1: Needs Table					
Needs Identified	Level (C/F)	Agency Mission (Y/N)	Currently Addressing (Y/N)	If not currently addressing, why?	Agency Priority (Y/N)
PENDING 2025 CNA Report to be completed in May 2025				Choose an item.	
				Choose an item.	
				Choose an item.	
				Choose an item.	
				Choose an item.	

Needs Identified: Enter each need identified in your agency’s most recent CNA. Ideally, agencies should use ROMA needs statement language in Table 1. ROMA needs statements are complete sentences that identify the need. For example, “Individuals lack living wage jobs” or “Families lack access to affordable housing” are needs statements. Whereas “Employment” or “Housing” are not. Add row(s) if additional space is needed.

Level (C/F): Identify whether the need is a community level (C) or a family level (F) need. If the need is a community level need, the need impacts the geographical region directly. If the need is a family level need, it will impact individuals/families directly.

Agency Mission (Y/N): Indicate if the identified need aligns with your agency’s mission.

Currently Addressing (Y/N): Indicate if your agency is addressing the identified need.

If not currently addressing, why?: If your agency is not addressing the identified need, please select a response from the dropdown menu.

Agency Priority: Indicate if the identified need is an agency priority.

Table 2: Priority Ranking Table

	Agency Priorities	Description of programs, services, activities	Indicator(s) or Service(s) Category
1.	PENDING 2025 CNA Report to be completed in May 2025.		
2.			
3.			
4.			
5.			

Agency Priorities: Rank the needs identified as a priority in Table 1: Needs Table according to your agency’s planned priorities. Ideally, agencies should use ROMA needs statement language. Insert row(s) if additional space is needed.

Description of programs, services, activities: Briefly describe the program, services, or activities that your agency will provide to address the need. Including the number of clients who are expected to achieve the indicator in a specified timeframe.

Indicator/Service Category: List the indicator(s) (CNPI, FNPI) or service(s) (SRV) that will be reported on in Modules 3 and 4 of the CSBG Annual Report.

Part II: Community Action Plan

CSBG Act Section 676(b)(11)

California Government Code Sections 12745(e), 12747(a)

California Code of Regulations Sections 100651 and 100655

Vision and Mission Statements

ROMA – Planning

1. Provide your agency's Vision Statement.

We see generations of healthy communities where poverty ceases to exist.

2. Provide your agency's Mission Statement.

We seek to end and prevent poverty by stabilizing, sustaining and empowering people with the resources they need when they need them. By forging strategic partnerships, we form a powerful force to improve our community.

Causes and Conditions of Poverty

Organizational Standards 1.1, 1.2, 3.2, 3.4

ROMA – Planning

1. Describe the key findings of your analysis of information collected directly from low-income individuals to better understand their needs. (Organizational Standards 1.1, 1.2)

PENDING 2025 CNA Report to be completed in May 2025.

2. Describe your agency's assessment findings specific to poverty and its prevalence related to gender, age, and race/ethnicity for your service area(s). (Organizational Standard 3.2)

PENDING 2025 CNA Report to be completed in May 2025.

3. "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 your needs assessment data, describe the causes of poverty in your agency's service area(s). (Organizational Standard 3.4)

PENDING 2025 CNA Report to be completed in May 2025.

4. "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 your needs assessment data, describe the conditions of poverty in your agency's service area(s). (Organizational Standard 3.4)

PENDING 2025 CNA Report to be completed in May 2025.

5. Describe your agency's data and findings obtained through the collecting, analyzing, and reporting of customer satisfaction data.

CAP OC's 2024 Customer Satisfaction Survey was conducted from August 5 to December 31, 2024. Community Action Partnership of Orange County used both quantitative and qualitative methods to analyze customer feedback and gain insight into client satisfaction.

Our agency aimed to collect 415 survey responses; we exceeded this goal with a total of 570 responses. Of those, 310 participants (57%) completed the survey in English.

The survey consisted of five questions focused on the participant experience and their engagement with the agency. The first question, which was required, asked respondents to rate their overall satisfaction—95% reported being satisfied.

The second question focused on staff assistance and respect, with 96% of respondents expressing satisfaction. The third question asked about the cleanliness and accessibility of our facilities, and

92% of participants indicated they were satisfied. The fourth question assessed whether services met participant needs, with 94% responding positively. The fifth and final question asked how likely participants were to continue using our services—95% indicated they were likely to return.

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Tripartite Board of Directors

CSBG Act Sections 676B(a) and (b), 676(b)(10)

Organizational Standards 1.1. 3.5

ROMA – Evaluation

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), Organizational Standard 1.1)

As a designated Community Action Agency, Community Action Partnership of Orange County (CAP OC) is governed by a tripartite Board of Directors designed to ensure equitable access, representation, and participation—particularly for historically underrepresented and marginalized communities. In alignment with federal Community Services Block Grant (CSBG) requirements, one-third of the Board is composed of representatives of the low-income community.

Low-income individuals who believe their interests are not adequately represented on the Board may submit a formal petition requesting a review. Upon receipt of such a petition, the Board will conduct an investigation, hold a hearing, and evaluate whether current representation meets the required standards. If the Board finds inadequate representation, it is obligated to take affirmative action to address the imbalance.

Any actions taken by the Board, either before or after this determination, that are made in good faith, shall be considered valid and undertaken in compliance with applicable regulations.

2. Describe your process for communicating with and receiving formal approval from your agency board of the Community Needs Assessment (Organizational Standard 3.5).

CAP OC follows a structured and transparent process for communicating with and securing formal approval from the Board of Directors regarding the Community Needs Assessment (CNA), ensuring alignment with Organizational Standard 3.5 and emphasizing shared governance and community accountability.

Early Engagement and Timeline Sharing: Planning Staff inform the Board early in the planning stages about the CNA's objectives, scope, methodology, and timeline, including phases like data collection, community engagement, analysis, and report development.

Ongoing Updates and Feedback Opportunities: The Planning Department provides regular updates during the Programs & Planning Subcommittee board meetings, sharing data highlights, trends, and community engagement progress. Board members are encouraged to offer feedback and contribute insights.

Presentation of the Final Draft: The completed CNA is formally presented to the Board with an

executive summary, key findings, identified priority needs, and recommendations for strategic planning and service delivery.

Formal Board Review and Approval: The Board receives the CNA in advance for review, and staff facilitate a discussion during the meeting. The Board approves the CNA, which is recorded in the meeting minutes as part of compliance documentation.

Integration into Strategic Planning and Public Sharing: Once approved, the CNA is publicly posted on the agency's website and integrated into the Strategic Plan's semi-annual update and other internal processes and funding applications.

Service Delivery System

CSBG Act Section 676(b)(3)(A)

State Plan 14.3a

ROMA - Implementation

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 14.3a)

CAP OC operates a comprehensive service delivery system that is designed to meet the needs of low-income communities across Orange County efficiently. Central to this system is the use of Apricot360, a customized client management software that allows us to track client information, services, and outcomes across all of our programs. This software enables a universal intake process that collects key demographic data, including income, health insurance status, and ethnicity, allowing us to centralize and streamline the intake process across various services. The integration of Apricot360 is part of CAP OC's broader goal to become a data-driven organization, which enhances our ability to report more accurately to funders and improve program outcomes.

Our service delivery approach includes direct services and subcontractors' partnerships, depending on the program. For example, CAP OC directly provides Utility Assistance and Weatherization services through the Serv-Traq platform. During the pandemic, we implemented an online application process, which remains in place today alongside in-person applications, making these services more accessible. Similarly, the OasisInsight system is used to manage participant intake and track outcomes for the Senior Food Box Program (CSFP), ensuring that we can support senior residents in meeting their nutritional needs.

In addition to Apricot360, we use other databases for specific programs. For instance, CAP OC's Family Resource Centers (FRCs) and the Families and Communities Together (FaCT) program utilize VistaShare to collect and report client data for family support services. These FRCs work in partnership with the County of Orange Social Services to track outcomes and maintain regular communication with the families we serve. In 2023, we began integrating Apricot360 for client intake and tracking in these programs as well.

For more specialized services, CAP OC collaborates with subcontractors. For example, our FaCT programs, the California Department of Food and Agriculture (CDFA) Giving Farm programs, and the SCAG Broadband equity contract are managed with the help of subcontractors. These subcontractors support CAP OC in meeting reporting requirements and ensuring compliance with the terms of the master contract. All subcontractors are subject to audits, and CAP OC works closely with them to provide narrative and data-driven reports as required by the funding agencies.

CAP OC also engages in partnerships with organizations such as CalOptima, where we use the Apricot360 system to manage referrals and track outcomes for clients participating in CalAIM services like Housing Navigation, Asthma Remediation, and Home Modifications for Seniors. As of

2024, CAP OC is expanding its services under CalOptima to include Enhanced Case Management (ECM) for eligible clients, further reinforcing our integrated, client-centered approach to service delivery.

By combining direct services and subcontracted partnerships, CAP OC is able to provide a comprehensive and flexible service delivery system that adapts to the evolving needs of the communities we serve, while maintaining high standards of data collection, program evaluation, and accountability.

2. Describe how the poverty data related to gender, age, and race/ethnicity referenced in Part II: Causes and Conditions of Poverty, Question 2 will inform your service delivery and strategies in the coming two years?

CAP OC is committed to utilizing poverty data related to gender, age, and race/ethnicity to refine our service delivery and strategies over the next two years. Our approach is rooted in data-driven insights, which enable us to tailor services to meet the specific needs of diverse communities across Orange County. With the integration of Apricot360, our customized client management system, we can collect and analyze demographic information such as gender, income, health insurance status, and ethnicity through a universal intake process. This system centralizes client data, ensuring consistency and accuracy in how we track and report the individuals we serve.

By capturing and analyzing these demographic data points, we can better understand the composition of the populations we serve and identify trends that may indicate emerging needs or disparities. This will allow us to adjust our strategies and services to be more responsive to the specific challenges faced by different groups, ensuring that we address inequities related to gender, age, and race/ethnicity. For example, if data shows that a particular demographic group is disproportionately affected by certain barriers to service, we can proactively adjust our outreach or tailor program offerings to better support those individuals.

In addition to Apricot360, we use other databases like Serv-Traq, OasisInsight, and VistaShare to manage program performance and track client data across different services. In the Utility Assistance and Weatherization programs, the continued use of an online application process alongside in-person applications allows for more efficient eligibility screening and ensures that we can serve clients in a variety of circumstances. Similarly, the OasisInsight system helps us capture important data points in the Senior Food Box Program (CSFP), such as income sources and race/ethnicity, which are crucial for assessing eligibility and identifying potential barriers to service.

At our Family Resource Centers (FRCs) and through the Families and Communities Together (FaCT) program, we track client demographics and outcomes using VistaShare and Apricot360, which help us monitor trends and assess the effectiveness of our services. Additionally, our collaboration with CalOptima and the CalAIM program allows us to track services such as Asthma Remediation and Home Modifications for Seniors using Apricot360, while also capturing demographic data through SafetyNet Connect for CalAIM participants. This integrated data

collection ensures that we can offer tailored services and follow up with clients more effectively.

By leveraging these systems and incorporating demographic data into our service delivery, CAP OC is positioned to enhance resource allocation, better address the needs of vulnerable populations, and optimize program outcomes. In the coming years, we will continue to refine our strategies based on this data to ensure that we are meeting the evolving needs of low-income communities in Orange County.

Linkages and Funding Coordination

CSBG Act Sections 676(b)(1)(B) and (C); 676(b)(3)(B), (C) and (D); 676(b)(4), (5), (6), and (9)

California Government Code Sections 12747(a), 12760

Organizational Standards 2.1

State Plan 9.3b, 9.4b, 9.5, 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)(9); Organizational Standard 2.1; State Plan 14.1c)

Given the size of Orange County, the large number of low-income residents, and the area's high cost of living, CAP OC recognizes the importance of coordinated efforts to effectively address community challenges. To ensure a comprehensive approach, we collaborate with various providers through formalized partnerships and funding coordination. These collaborations focus on addressing the specific needs of different cities within the county and creating inclusive, cross-cultural initiatives that empower local social service providers. Our partnerships strategically work to enhance the health and economic stability of individuals and families in Orange County.

Below are some key organizations and coalitions CAP OC participating in to coordinate funding and services with other providers:

- The OC Black Solidarity Network (OCBSN), led by CAP OC, combats hate crimes and incidents targeting the Black community in Orange County. Formed through California's Stop the Hate initiative, the coalition focuses on addressing hate crimes, educating the public, and providing resources for Black residents facing poverty.
- Families and Communities Together (FaCT): A public-private partnership program of the County of Orange Social Services Agency, FaCT collaborates with CAP OC to provide family support services through Family Resource Centers in Anaheim and El Modena. These centers offer counseling and other services to support families in need.
- Orange County Health Care Agency (HCA) and Office of Family Assistance – Partnering to enhance services and support for families in need across the county.
- United Way of Orange County: Through partnerships with organizations like United Way, CAP OC participates in initiatives aimed at addressing critical community issues, such as poverty and hunger.
- OneOC: CAP OC collaborates with OneOC, a nonprofit organization that connects volunteers with local nonprofits, including CAP OC. This partnership enhances community engagement and support for various programs and services.

- Financial Stability Alliance – A collaboration with OC HCA and OC United Way to promote financial stability and independence through coordinated efforts.
- CalOptima-CalAIM Community Supports – Coordinating services through the CalAIM Community Supports program, which includes housing navigation and sustainability services for eligible clients. CAP OC offers a range of services that align with the Community Supports under California's CalAIM initiative. These services aim to address social determinants of health and support the well-being of vulnerable populations.
- Abound Food Care (formerly Waste Not OC) – A public-private partnership focused on eliminating hunger and reducing food waste, providing food assistance and nutritional support.
- FaCT Program (Families and Communities Together) – CAP OC acts as a program service provider and limited fiscal agent for FaCT, operating out of the El Modena and Anaheim Independencia Family Resource Centers.
- 211OC and Online Referral Pilot System – Collaborating on a new referral system to streamline access to social services for those in need.
- City of Irvine Vulnerable Populations Grant – Partnering with the City of Irvine to address the needs of vulnerable populations through targeted funding.

By working with these organizations and coalitions, CAP OC helps maximize resources and ensure that services are delivered effectively, providing critical support to underserved communities throughout Orange County.

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)(3)(C), Organizational Standard 2.1, State Plan 9.7)

CAP OC engages in multiple memorandums of understanding (MOUs) and service agreements with other entities to coordinate services and funding, ensuring that there is no overlap or duplication of services. These agreements support the work of CAP OC's various program departments, including Youth and Family Programs, Energy and Environmental Services, and the OC Food Bank. Through these partnerships, CAP OC is able to secure funding and services that help to meet the needs of the communities it serves. Notable collaborations include:

- Second Harvest Food Distribution Partnership: CAP OC partners with Second Harvest to operate the La Colonia Market at the Anaheim Independencia FRC. While this program was temporarily suspended due to the pandemic, it resumed in summer 2021 to continue providing food assistance.
- PIMCO Cares Share the Harvest: CAP OC collaborates with PIMCO Cares to support food acquisition and distribution. These are provided to approximately 200 active nonprofit partners

of the OC Food Bank. During the pandemic, this funding shifted to a cash payment model to purchase pre-assembled food boxes for distribution.

- The State of California has provided significant funding to the Orange County Diaper Bank, operated by CAP OC to address diaper need among low-income families. In August 2023, with continued support from state legislators, including Senator Tom Umberg and former Assemblymember Tom Daly, CAP OC expanded its diaper distribution efforts. As of 2024, CAP OC's diaper bank services approximately 10,000 infants monthly through a network of 80 partner agencies. The program continues to play a vital role in supporting families and promoting child health and well-being throughout the region.
- Orange County United Way's Financial Stability Programs: CAP OC collaborates with Orange County United Way to administer the Volunteer Income Tax Assistance program. This initiative, which educates participants on budgeting, saving, credit management, and the impact of interest, is offered at four CAP OC locations.
- AmeriCorps Fellowship Program: CAP OC partners with AmeriCorps for a four-month program each year, providing valuable support for various initiatives. The partnership is expected to continue into 2024.

Significant MOUs and cooperative agreements of interest include:

- OC Food Bank's Giving Farm: CAP OC, in partnership with the Huntington Beach Unified High School District, the OC Farm Bureau, and Westminster High School's Agriculture Science Program, fosters hands-on agricultural experiences for students and provides access to local, healthy food for the community.
- SNAP Outreach with the CA Association of Food Banks: CAP OC works with the California Association of Food Banks and other local organizations, such as CalOptima and the Orange County Board of Education, to reduce food insecurity in hard-to-reach populations. This effort also includes a unified CalFresh Healthy Living website for Orange County.
- Abound Food Care Coalition: As a private nonprofit partner, Abound Food Care supports CAP OC by delivering over 11 million warm, prepared meals to individuals in need, helping to alleviate food insecurity in the community.

These partnerships and agreements enable CAP OC to maximize resources, collaborate with key community stakeholders, and deliver essential services to residents across Orange 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), California Government Code 12760)

Strategic Partnerships and Community Engagement

CAP OC continually identifies and cultivates strategic partnerships that enhance the value and impact of our programs. This includes bolstering resources at our three Family Resource Centers (FRCs) without duplicating existing services. Even during the pandemic, when some departments operated remotely, CAP OC remained deeply engaged in outreach, community meetings, and civic initiatives.

As an active member of the County of Orange Continuum of Care (CoC), CAP OC closely follows Commission developments and serves on the CoC Housing Committee. In 2020, CAP OC was selected by the County to deliver housing navigation and sustainability services to individuals experiencing homelessness or housing instability within coordinated service frameworks and continues to do so via-CalAM funding and programming. Today, as a CalOptima contractor, CAP OC participates in the CalOptima Connect system, enabling referrals and service tracking for those we assist.

Family Resource Centers: Local Anchors of Support

Our three Family Resource Centers—El Modena, Anaheim Independencia, and the Southwest Community Center (SWCC)—serve as trusted hubs for local families and individuals in need.

Anaheim Independencia and El Modena are located in the unincorporated communities of Anaheim and Orange, respectively. These centers provide critical safety net services to low-income residents, including nutritious food distribution, utility and weatherization assistance, and access to workshops on citizenship, healthy relationships, financial literacy, and youth development.

Each center collaborates with 15 partner organizations and regularly engages with neighboring agencies to support programs that promote environmental stewardship, economic self-sufficiency, public health, and hunger relief. At El Modena, CAP OC coordinates directly with multiple County departments, including Community Resources, Health Care, Social Services, Housing & Community Development, and the Sheriff's Department.

Southwest Community Center (SWCC): A Meal and More

Located in Santa Ana, the Southwest Community Center became part of CAP OC in late 2019. It is a vital lifeline for individuals experiencing homelessness, offering three meals daily, seven days a week. During the height of the pandemic, meal services transitioned to a grab-and-go model. By mid-2021, traditional meal services resumed and continued through 2023, with the same expected for 2024 and beyond.

Meals at SWCC are prepared by volunteer groups in our certified kitchen or offsite in County-approved facilities. In addition to meal services, the Center has expanded its offerings to include youth programming and financial empowerment services, further aligning with our holistic approach to community support.

4. Describe how your agency will leverage other funding sources and increase programmatic and/or organizational capacity. (CSBG Act Section 676(b)(3)(C))

Leveraging Funding and Expanding Capacity

In 2024, Community Action Partnership of Orange County (CAP OC) strategically utilized its Community Services Block Grant (CSBG) allocation to attract and coordinate additional funding from public and private sources, thereby enhancing our capacity to serve low-income communities across Orange County.

Diversified Funding Streams

While specific figures for 2024 are pending publication, CAP OC has historically demonstrated a strong ability to leverage CSBG funds to secure significant additional resources. For instance, in 2022, an annual CSBG grant of approximately \$2.8 million facilitated the mobilization of over \$32.6 million in supplementary funding, including federal, state, local, and private sector contributions. This trend continued in subsequent years, underscoring our commitment to maximizing the impact of CSBG investments.

Private Sector Engagement

CAP OC's philanthropic efforts have remained robust, with private donations playing a crucial role in supporting our programs. In 2023, private donations amounted to approximately \$3 million, reflecting sustained community support. Our 2024 fundraising strategy focuses on expanding our donor base and enhancing monthly giving programs, particularly to bolster our Family Resource Centers.

Volunteer Mobilization

Volunteers are integral to CAP OC's operations. In 2023, our OC Food Bank volunteers contributed over 3,000 hours of service each month, assisting in the assembly of food boxes for children and seniors. This level of engagement is expected to continue in 2024, with corporate and community volunteer participation returning to pre-pandemic levels.

Innovative Partnerships

CAP OC continues to foster innovative partnerships to enhance programmatic capacity. The Giving Farm, a collaboration with Westminster High School and Solutions for Urban Agriculture, exemplifies this approach. Volunteers at the farm help cultivate fresh produce for low-income families and school cafeterias. These efforts have contributed to securing grants, including a \$100,000 USDA Farm to School grant and additional funding from the California Department of Food and Agriculture.

Internship Programs

Our internship programs with local universities and colleges provide students with practical experience while augmenting our organizational capacity. Interns contribute across various departments, including Planning, and have adapted to hybrid work models that combine in-person and remote activities. This flexible approach is anticipated to continue through 2025. □

Enhanced Client Management

To improve service delivery, CAP OC transitioned from the Shah client management system to Apricot360 in spring 2023. This upgrade enhances our data tracking, case management, and referral capabilities, aligning with CSBG Organizational Standards and facilitating long-term service planning and evaluation.

In summary, CAP OC's strategic use of CSBG funds in 2024 has enabled us to leverage additional resources, strengthen community partnerships, and expand our capacity to meet the evolving needs of Orange County's most vulnerable residents.

5. Describe your agency's contingency plan for potential funding reductions. (California Government Code Section 12747(a))

Community Action Partnership of Orange County (CAP OC) maintains a proactive approach to potential reductions in Community Services Block Grant (CSBG) funding. Our agency remains committed to ensuring that essential services to low-income families continue without disruption.

In 2024, CAP OC received an estimated CSBG allocation of \$3.17 million, reflecting a diminishing percentage of our growing total revenue base. As of the end of 2023, CAP OC reported total net assets of approximately \$18.5 million, positioning us well to absorb and strategically manage funding variances.

Should CSBG resources be curtailed, CAP OC will prioritize zero-based budgeting principles, reassessing all programs and administrative functions to ensure alignment with mission impact, cost-effectiveness, and programmatic necessity. Emphasis will be placed on sustaining direct-service programs that most effectively reduce poverty and enhance family stability—such as housing navigation, food security initiatives, and wraparound support services provided through our Family Resource Centers.

To further mitigate funding shortfalls, CAP OC continues to diversify its revenue streams. This includes pursuing competitive grants from federal, state, and private sources; cultivating individual and corporate donors; and expanding our monthly donor base. Fundraising strategies also include community-driven campaigns and annual events, designed to build both financial and grassroots support.

Operational efficiencies remain a key priority. CAP OC will continue consolidating similar or complementary services to reduce redundancy and administrative overhead. Technology platforms such as Apricot360 will be leveraged for case management and performance monitoring, improving service coordination and accountability.

Additionally, implementation of our Five-Year Strategic Plan (2022–2027) will be accelerated, including initiatives that increase organizational resilience. These include scaling our volunteer network, expanding university-based internship partnerships, and enhancing workforce capacity through ongoing training and cross-functional team development.

By aligning programmatic capacity with available funding and focusing on strategic partnerships and innovation, CAP OC is well-positioned to navigate fiscal uncertainties while continuing to meet the needs of Orange County’s most vulnerable residents.

6. 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)

(CAP OC) is dedicated to empowering youth in low-income communities through comprehensive development programs and strategic collaborations. In 2024 and beyond, CAP OC continues to expand its initiatives, focusing on mentorship, education, leadership, and holistic well-being. Log in or sign up to view+5Log in or sign up to view+5capoc.org+5

Youth Empowerment and Leadership Programs

CAP OC's Family Resource Centers (FRCs) in El Modena, Anaheim Independencia, and the Southwest Community Center offer daily youth programs designed to foster personal growth and community engagement. These programs include mentorship, tutoring, life skills development, and enrichment activities tailored to meet the unique needs of each community .

The "Empowered to Thrive" initiative is a trauma-informed, culturally responsive program targeting youth aged 7–17. It operates across all three CAP OC centers, providing after-school activities that promote resilience and self-confidence . capoc.org

Elevate Youth Program

Elevate Youth is a youth-led program that utilizes arts-based activities to raise awareness about

substance use prevention and enhance leadership skills. Through creative expression, participants engage in community advocacy and develop strategies to combat the negative impacts of substance abuse.

Workforce Development and Financial Empowerment

The "Empowered2Work" program focuses on workforce development and job readiness for individuals aged 17 and above. It emphasizes self-empowerment, career exploration, and interpersonal skill development, preparing young adults for successful employment.

The "Empowered2Work" program is CAP OC's flagship workforce development initiative, targeting individuals aged 17 and above. This program offers a holistic approach to job readiness, focusing on:

- **Self-Empowerment:** Building confidence and resilience to navigate the job market.
- **Career Exploration:** Assisting participants in identifying career paths aligned with their interests and skills.
- **Interpersonal Skill Development:** Enhancing communication, teamwork, and problem-solving abilities essential for workplace success.

Participants engage in personalized coaching sessions, workshops, and hands-on activities that not only prepare them for employment but also promote job retention by fostering healthy habits and emotional intelligence. Since its inception, Empowered2Work has served numerous young adults, providing them with the tools to achieve sustainable employment and career growth.

Community Collaboration and Support

CAP OC collaborates with local organizations, schools, and government agencies to enhance program effectiveness and reach. By partnering with entities such as CalOptima Health and OC United Way, CAP OC ensures that youth have access to comprehensive support services, including health resources and tax assistance.

Future Initiatives

Looking ahead, CAP OC plans to expand its youth programs by securing additional funding and

resources. The organization aims to introduce new initiatives that address emerging challenges faced by youth in low-income communities, ensuring that every young individual has the opportunity to thrive.

7. 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)

We have significantly expanded our youth development initiatives in 2024–2025, focusing on holistic, trauma-informed, and culturally responsive programs that foster resilience, leadership, and community engagement among underserved youth.

Elevate Youth: Empowering Through Arts and Advocacy

Our Elevate Youth program targets youth aged 12–26 in Anaheim, Orange, and Santa Ana. This initiative uses arts-based activities—such as poetry, dance, music, and murals—to build awareness around substance use prevention and enhance leadership and policy advocacy skills. The program is designed to reduce the school-to-prison pipeline and increase youth participation in community decision-making.

Elevate Youth has fostered cross-sector collaborations with other youth-serving organizations, providing platforms for youth-led listening sessions, community events, and wellness workshops that emphasize self-expression, self-care, and civic responsibility.

Southwest Community Center: Revitalizing Youth Engagement

In 2022, we launched new youth programming at the Southwest Community Center in Santa Ana, marking a transformative shift in its services. While the center had been known primarily for providing meals to individuals experiencing homelessness, we expanded its scope to include structured youth development activities. Under the leadership of our new Program Manager, the program grew from two consistent participants to 21 enrolled youth aged 5–18 in just six months.

The program emphasizes social-emotional learning, homework assistance, and trauma-informed care using the Trust-Based Relational Intervention (TBRI) model. This approach views behavior as a form of communication, helping youth who have experienced adversity build secure relationships, emotional regulation skills, and academic competence.

One powerful example of impact involved a fifth-grade student who entered the program reading at a first-grade level. With daily reading practice and academic support, the student reached grade-level reading proficiency by the end of the semester—illustrating the life-changing potential of targeted interventions.

Collaborative Efforts and Future Directions

We continue to strengthen youth support by coordinating efforts with family resource centers in Anaheim and Orange, local school districts, and a growing number of nonprofit and public partners. These partnerships help improve service delivery, increase outreach, and ensure culturally competent care tailored to the needs of each community.

Moving forward, we plan to integrate college exposure and workforce readiness training into our teen programming. These efforts will connect students to career pathways, leadership opportunities, and financial literacy resources that are essential for long-term success.

Our youth programming also promotes awareness of anti-racism, cultural identity, and environmental responsibility. One such example is a youth-led nature hike and educational event that centered on themes of ancestral knowledge, climate care, and equity—empowering young participants to connect with both the land and their heritage.

While the challenges of the pandemic deeply impacted youth across Orange County, we have emerged with renewed commitment and momentum. Our vision is not only to expand access to youth development programs but to equip young people with the tools they need to become leaders and changemakers in their communities. Through empowerment, education, and community connection, we are building a future where all youth can thrive.

8. Describe your agency's 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)

We have strengthened our coordination of employment and training activities under the Workforce Innovation and Opportunity Act (WIOA), aligning with the goals of Section 3 to enhance workforce development and economic mobility for underserved populations.

Strategic Partnerships and Workforce Integration

We collaborate closely with the three local Workforce Development Boards (WDBs) in Orange

County—Santa Ana, County of Orange, and Anaheim—to deliver comprehensive employment services. As a signatory to the Memoranda of Understanding (MOUs) with these WDBs, we ensure seamless integration of services, including outreach, enrollment assistance, and co-enrollment opportunities for clients accessing One-Stop Career Centers. This collaboration facilitates a unified approach to workforce development, aligning our programs with regional labor market needs and employer demands.

Empowered2Work: A Holistic Workforce Development Program

Our Empowered2Work program serves young adults aged 17–27, focusing on building both hard and soft skills essential for sustainable employment. The program offers personalized coaching, workforce readiness workshops, and referrals to supportive services, addressing barriers such as childcare, transportation, and housing instability. Participants engage in training sessions covering resume building, interview preparation, emotional intelligence, and workplace wellness. Once participants secure employment, they receive follow-up support for up to one year to ensure job retention and career advancement.

Weatherization Apprenticeship Program

In response to the shortage of qualified weatherization professionals, we established an apprenticeship program to train individuals for certification in weatherization and healthy homes techniques. The program provides hands-on experience and technical training, preparing apprentices for careers in the growing field of energy efficiency. In 2023, all three apprentices successfully passed the credential examinations, demonstrating the program's effectiveness in workforce preparation.

Internship and AmeriCorps Fellowships

We offer internship opportunities in collaboration with local universities, providing students from diverse backgrounds with professional development experiences. These internships, available in hybrid formats, allow students to gain practical skills while earning college credit. Additionally, we partner with OneOC to host AmeriCorps Fellows, who contribute to community needs assessments and program development, further enhancing our capacity to serve the community.

CalWORKs Work Experience Program

We also serve as an employment site for the Orange County Social Services Agency's CalWORKs (TANF) Work Experience Program. This partnership provides participants with work-based learning opportunities, helping them build job readiness skills and gain practical experience, which are critical

for achieving self-sufficiency and long-term employment success.

Through strategic partnerships, innovative programs, and a commitment to addressing the unique barriers faced by underserved populations, we effectively coordinate employment and training activities to promote economic mobility and self-sufficiency. By aligning with WIOA objectives, we contribute to a more inclusive and resilient workforce in Orange County.

9. 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)

We are committed to addressing food insecurity and malnutrition among low-income individuals and families. Our approach is multifaceted, combining emergency food distribution, nutrition education, and access to essential services to ensure that individuals and families can meet their basic needs and improve their long-term health outcomes.

Emergency Food Distribution and Services

Our OC Food Bank plays a central role in providing emergency food supplies to individuals and families facing food insecurity. We collaborate with over 200 partner organizations, including food pantries, churches, and nonprofit agencies, to distribute nutritious food to those in need. This network helps us reach a broad population across Orange County, ensuring that families and individuals have access to the food they need during times of crisis.

In addition to direct food assistance, CAP OC operates several key programs that provide vital support to those struggling with hunger. We participate in the Emergency Food and Shelter Program (EFSP) and the Commodity Supplemental Food Program (CSFP), both of which help us deliver food and emergency supplies to those in urgent need. Our partnerships with organizations such as Second Harvest and Abound Food Care have further strengthened our capacity to address food insecurity across the region. These collaborations have enabled us to attract additional funding and resources, which we have used to expand our food distribution efforts.

In 2023, we improved the management of our food warehouse with new systems, such as Primarius, which streamline food inventory and distribution. This system allows us to serve over 7,000 families on a single Saturday at major distribution centers in Santa Ana and at the OC Fairgrounds, further ensuring that those in need have access to emergency food. This initiative has been made possible by funding from the Orange County Board of Supervisors, who provided over \$1 million in support.

Addressing the "Food Cliff" and Expanding Access

In light of the significant changes to CalFresh and Medi-Cal eligibility regulations in 2024, we are actively working with the Orange County Board of Supervisors to secure additional food assistance to mitigate the impact of what has been referred to as the "food cliff." This regulatory shift threatens to reduce access to vital nutrition programs for thousands of individuals and families in the region, and we are committed to advocating for resources to support those affected by these changes.

Infrastructure and Program Enhancements

Through state funding provided to California food banks, we have made substantial improvements to our infrastructure, including investments in refrigeration equipment and facility upgrades. These improvements ensure that we can safely store and distribute fresh, nutritious food to those in need. One of our valued partners in this effort is the Westminster High School Giving Farm, which contributes fresh produce to our food bank for distribution to local communities.

CalFresh Healthy Living Program

As a subcontractor for the County of Orange Health Care Agency, we administer the CalFresh Healthy Living program to promote nutrition education and healthy eating habits among low-income individuals. We work with local schools, early childhood education sites, and after-school programs to deliver nutrition classes that encourage healthier lifestyles. These classes are offered both in-person and virtually, with topics covering essential nutrition information and practical advice for preparing nutritious meals on a budget.

Our outreach efforts extend beyond traditional educational settings. We engage with local food pantries, retail stores, and parks to offer direct and indirect nutrition education, including interactive booths and short classes. We focus on youth, parents, and community members in Anaheim, with the goal of improving access to healthy food and building long-term habits that contribute to better health outcomes.

CAP OC remains dedicated to providing emergency food assistance and nutrition education to counteract hunger and malnutrition in Orange County. Through our food distribution network, partnerships, and proactive community engagement, we strive to reduce food insecurity and help low-income individuals and families thrive. With continued support and strategic investments in infrastructure, we are positioned to meet the growing needs of our community and ensure that all residents have access to the resources they need to lead healthy, productive lives.

10. Is your agency a dual (CSBG and LIHEAP) service provider?

Yes

No

11. For dual agencies:

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), State Plan 9.5)

For all other agencies:

Describe how your agency coordinates services with your local LIHEAP service provider?

CAP OC serves as the designated local operator for the Low-Income Home Energy Assistance Program (LIHEAP) in Orange County, under contract with the California Department of Community Services and Development (CSD). Our Energy and Environmental Services Department administers LIHEAP, the Low-Income Weatherization Program (LIWP), and the Department of Energy's Weatherization Assistance Program (DOE WAP), offering utility payment assistance, weatherization services, water bill relief, and emergency replacements for heating and cooling systems.

We actively participate in information sessions conducted by CSD alongside other California LIHEAP agencies, fostering collaboration and knowledge sharing. Additionally, we are members of the California Community Action Partnership Association (CalCAPA), a statewide organization that facilitates coordination among anti-poverty programs.

Our coordination efforts extend to various community partners, including local housing authorities, nonprofit organizations, and other service providers. Through these collaborations, we ensure that eligible households receive comprehensive support, addressing not only their immediate energy needs but also broader social and economic challenges. This integrated approach enhances the effectiveness of our services and promotes long-term self-sufficiency for low-income residents in Orange County.

Coordinating Emergency Energy Crisis Intervention Programs

CAP OC plays a key role in managing and distributing Low-Income Home Energy Assistance Program (LIHEAP) funds, which are designed to provide financial support to low-income households facing energy crises. Through LIHEAP, we offer utility assistance, weatherization services, water bill relief, and emergency replacements for heating and cooling systems. These programs, which were originally established in response to national energy conservation efforts, continue to provide

essential services to those in need.

In addition, we have expanded our offerings to include a range of services under the Department of Energy Weatherization Program, which focuses on improving energy efficiency in homes. By providing improvements in weatherization, such as replacing outdated appliances or adding insulation, we help families reduce energy consumption and lower their utility bills. Our services also address health-related issues, such as asthma, by conducting home modifications and remediation efforts to improve air quality and safety.

Collaborating with Community Partners

Our outreach team works in close coordination with a variety of local partners to ensure that our energy assistance programs reach as many households as possible. We regularly collaborate with organizations such as Habitat for Humanity, the OC Housing Authority, Mercy House, and local housing providers like Caritas Communities and Jamboree Housing to connect individuals and families with the resources they need. This network of partnerships extends our reach and enhances the impact of our work across the county.

In 2023, we entered into a contract with CalOptima, allowing us to integrate asthma remediation and home modifications for medical purposes into our weatherization assessments. This partnership enables us to provide up to \$7,500 in services for each eligible individual, addressing health concerns like mold removal, pest control, and home modifications to accommodate medical needs. CAP OC is the only agency in California offering this unique service, and we are proud to lead the way in integrating health and housing solutions for low-income residents.

Expanding Community Support

CAP OC's efforts extend far beyond energy assistance. We are a founding member of the Kennedy Commission, which advocates for affordable housing for extremely low-income families, and we participate in the OC Continuum of Care Housing Committee, where we collaborate with other leaders to address the housing needs of the homeless population. We also serve on various regional committees, such as the Orange County Financial Stability Alliance, which promotes financial literacy and asset-building programs for low-income communities.

Our commitment to food security is demonstrated through our involvement in initiatives like the OC Hunger Alliance, which we co-founded with partners like Second Harvest and Abound Food Care. This collaboration addresses food insecurity in the aftermath of the COVID-19 pandemic, and we continue to work together to ensure that nutritious food reaches those in need. Additionally, we are active participants in the Food Insecurity Committee at the University of California, Irvine, and in

regional efforts like the Move More, Eat Healthy Coalition, which promotes physical activity and healthy eating.

Advocacy and Policy Leadership

CAP OC is not only a service provider but also an advocate for systemic change. Our staff holds leadership roles in several important organizations, including the California Community Action Partnership Association (Cal CAPA) and the National Commodity Supplemental Food Program Association (CSFP). Through these affiliations, we contribute to the development of policies that support low-income individuals and families. We also advocate for environmental justice by participating in working groups with the California Air Resources Board and the Southern California Association of Governments (SCAG), where we push for increased opportunities for low-income communities to access electric vehicles and related infrastructure

12. 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)

Through our Family Resource Centers (FRCs) in El Modena and Anaheim Independencia, we provide vital services aimed at addressing the needs of low-income families in some of the most underserved communities in Orange County. These centers are funded through the County of Orange's Family and Community Together (FaCT) program and our Community Services Block Grant (CSBG) funds.

Our family services focus on supporting families who face multiple challenges, including low-income households, youth at risk, and families struggling with substance abuse, homelessness, and personal crises. We prioritize programs that aim to prevent child abuse and neglect, strengthen family dynamics, and enhance parenting skills. Among these efforts, we offer targeted programs for adolescents, ages 12-21, who are at risk, and provide vital services for parents, including initiatives aimed at improving fatherhood involvement in family life.

In the past, CAP OC ran the Healthy Relationship Program, funded by the U.S. Department of Health and Human Services, which provided relationship and communication training for couples and youth. This program was delivered at 15 Family Resource Centers in Orange County but concluded in 2020. With the support of CSBG CARES funding, we continued these services for approximately 25 families annually, integrating economic empowerment and workforce development to enhance participants' financial stability. A strong focus was placed on helping fathers build skills for financial and employment success, and we are currently seeking funding to restart these important services.

Beyond parenting and family-strengthening programs, CAP OC actively fosters neighborhood-level support through various initiatives. At our Southwest Community Center, we provide daily meals to those in need and offer financial empowerment services to help individuals achieve greater economic independence. Additionally, in 2023, we expanded our services to include youth programming aimed at developing essential life skills and promoting community engagement.

One of our most exciting initiatives in 2022 and 2023 was the creation of a student beekeeping club and honey-making social enterprise in partnership with Westminster High School and the Giving Farm. This project, which was funded by a \$100,000 grant from the State of California, provides students with valuable hands-on experience in food production and agriculture while also building their self-esteem. This innovative initiative was recognized with an Innovation Award from CalCAPA in 2022. Through this project, we aim to inspire students to explore careers in agriculture and related fields, equipping them with skills that will benefit both their personal development and the local community.

Through these initiatives, CAP OC continues to strengthen families, encourage effective parenting, and create opportunities for youth to thrive in their communities.

13. 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)

To address identified service gaps and ensure effective coordination, CAP OC utilizes a range of databases and systems for intake, case management, service tracking, and referrals. While these databases may not all be directly integrated with Apricot, we are committed to developing linkages and improving information flow between them to enhance service delivery, streamline referrals, and provide comprehensive support to our clients.

Integration of Databases for Efficient Service Delivery

We utilize **Vista Share** for intake, case management, service tracking, and outcomes at our two Family Resource Centers (FRCs) — El Modena and Anaheim Independencia. While Vista Share does not allow for direct integration with Apricot through an API, we continue to conduct separate in-person intakes at these centers to ensure that each client receives the attention and services they need.

Our **Energy Efficiency Services (EES)** program employs **ServTraq**, which has an API connection to Apricot to facilitate the transfer of completed Weatherization and Utility Assistance services twice a month. However, EES faces challenges with duplicate records in the ServTraq system, and the intake

process does not fully meet the CSBG reporting requirements. To address this, we are working to refine our intake process to align more effectively with Apricot's data management needs.

Additionally, EES has recently resumed direct data input into Apricot for **CalAIM** Community Support services, specifically addressing asthma remediation and environmental adaptations. This initiative also integrates service tracking and subcontractor management, though some staff may still rely on Excel or Access databases for these processes.

Our **Oasis** program is exploring integration options with Apricot, including the potential implementation of a one-way API. However, the current Oasis intake form is not comprehensive enough for CSBG reporting purposes, making it difficult to centralize intake at this time. The **Food Bank**, with its extensive network of 70 distribution sites, is working toward improving centralized intake through reauthorization processes every three years.

Collaborations with External Partners for Seamless Referrals

CAP OC is engaged in partnerships with organizations such as **CalOptima**, which operates separate databases (CalOptima Connect and Office Ally) that are not yet integrated with Apricot. While we are exploring options for integration, particularly related to youth and family programs and billing processes, the County's **Coordinated Entry System** for managing unhoused individuals requires manual entry, which further complicates the referral process.

We also collaborate with **United Way/211OC**, which uses a Salesforce platform for referrals. Currently, the system only supports email-based referrals to our FRCs, but with further investment, we are hopeful that we can develop a two-way API with Apricot to improve communication and streamline the referral process.

Enhancing Data Management and Tracking

CAP OC's **Nutrition Program** under Gaby Greg currently relies on batch input into Apricot and maintains a separate Access database for individualized tracking. Moving to centralized intake and consistent data entry in Apricot could resolve time-related barriers and improve the accuracy and efficiency of data management.

For **VITA Assistance**, we have typically avoided direct intake through Apricot due to privacy concerns, but we are re-evaluating this approach as we work to integrate United Way's database for progress tracking. Additionally, CAP OC's **Financial Empowerment staff** is preparing to take on the

VITA program, pending a United Way contract for 2025.

The **Food Bank** has transitioned from using **Primarioux** for inventory management to utilizing **Apricot** for tracking food donations. While this database does not involve participant information, it contributes to streamlining operations and enhancing transparency in food distribution.

Partnership and Volunteer Data Management

CAP OC also maintains databases for managing volunteers and financial supporters, including **Blackbaud Raisers Edge**, **Constant Contact**, and **Volunteer Hub** (which integrates with Blackbaud). These systems allow us to track donations, volunteer hours, and outreach efforts. Additionally, **Quorum** is used for legislative tracking and has an API to support targeted outreach via emails or phone numbers.

Next Steps for Improved Linkages and Integration

CAP OC is actively working to refine our processes and develop better linkages across these diverse systems. We aim to improve integration between **Apricot** and other specialized databases to ensure that client information is accessible, service gaps are identified early, and referrals are efficiently tracked and managed. We are also exploring opportunities for centralized intake wherever feasible, and will continue to invest in technology solutions to streamline case management and improve follow-up consultations.

By building these linkages, we can provide seamless, coordinated services that help clients navigate the complex landscape of community resources while ensuring that their needs are met comprehensively.

Monitoring

ROMA – Planning, Evaluation

1. 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, issuance of formal monitoring reports, and emergency monitoring procedures.

CAP OC employs a comprehensive, multi-tiered approach to monitor subcontractors and ensure the effective delivery of services funded by the Community Services Block Grant (CSBG). This process encompasses regular oversight, data integration, and fiscal accountability measures.

Subcontractor Monitoring and Oversight

CAP OC's subcontractor monitoring involves both on-site visits and desk reviews. The Planning Department, along with designated program staff, conducts these evaluations to assess compliance with contractual obligations and program standards. Monitoring activities include:

- **On-Site Visits:** Scheduled and unscheduled visits to subcontractor locations to observe operations, review records, and engage with staff and participants.
- **Desk Reviews:** Regular analysis of reports, financial statements, and performance data submitted by subcontractors.

Findings from these monitoring activities are documented in formal reports. If deficiencies are identified, CAP OC issues corrective action plans with specified timelines for resolution. Follow-up reviews ensure that corrective measures are implemented effectively.

Data Management and Integration

To enhance program monitoring and reporting, CAP OC has transitioned to advanced data management systems:

- **Apricot360:** Implemented in Spring 2023, this platform replaced the previous Shah Software system for case management and reporting across Family Resource Centers (FRCs). The transition involved a competitive procurement process, followed by a six-month design and testing phase. Apricot360 enables improved tracking of services, outcomes, and client data.
- **Serv-Traq:** Utilized by the Energy and Environmental Services Department, this state-approved system manages data related to Utility Assistance and Weatherization programs.
- **Oasis:** Adopted for the Senior Food Box Program, Oasis replaced an Access database to manage participant information for approximately 25,500 low-income seniors across 70 distribution sites. Eligibility is verified annually, with recertification every three years.

Efforts are underway to integrate these systems, with Apricot360 serving as the central hub, to streamline data collection and reporting processes.

Fiscal Oversight and Risk Management

CAP OC's fiscal monitoring framework includes:

- **Budgeting and Financial Reporting:** The annual budget process establishes programmatic assignments, with monthly financial performance reports reviewed by the Board of Directors and the Administrative Committee.
- **Contract and Expenditure Approval:** All contracts undergo a review and approval process involving the President and CEO. Expenditures require formal requisitions and dual-signature check disbursements.
- **Financial Management System:** In 2022, CAP OC transitioned from Sage 100 to the Blackbaud Financial Management System to enhance integration with fundraising efforts. The interim CFO continues to refine this system for improved reporting and budgeting.
- **Risk Management:** An agency-wide risk assessment conducted in 2021 led to the formation of an expanded Risk Management Committee. Another assessment is planned for Summer 2023 to further mitigate financial and operational risks.

These comprehensive monitoring and oversight practices ensure that CAP OC's subcontractors deliver services effectively, maintain compliance with funding requirements, and uphold the organization's commitment to serving the community.

ROMA Application

CSBG Act Section 676(b)(12)

Organizational Standards 4.2, 4.3

ROMA – Planning, Evaluation



1. Describe how your agency will evaluate the effectiveness of its 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)

PENDING 2025 CNA Report to be completed in May 2025.

2. Select one need from Table 2: Priority Ranking Table and describe how your agency plans to implement, monitor progress, and evaluate the program designed to address the need. (Organizational Standard 4.2)

PENDING 2025 CNA Report to be completed in May 2025.

Optional

3. Select one community level need from Table 2: Priority Ranking Table or your agency's most recent Community Needs Assessment and describe how your agency plans to implement, monitor progress, and evaluate the program designed to address the need. (CSBG Act Section 676(b)(12), Organizational Standard 4.2)

PENDING 2025 CNA Report to be completed in May 2025.

Federal CSBG Programmatic Assurances

CSBG Act Section 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--

- a. 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 underpart A of title IV of the Social Security Act);
- b. to secure and retain meaningful employment;
- c. 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;
- d. to make better use of available income;
- e. to obtain and maintain adequate housing and a suitable living environment;
- f. to obtain emergency assistance through loans, grants, or other means to meet immediate and urgent individual and family needs;
- g. to achieve greater participation in the affairs of the communities involved, including the development of public and private grassroots
- h. 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) “[A]n 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.

State Assurances

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.

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.

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.

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.

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 4.2 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.

Part III: 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, the Low-Income Testimony and the Agency’s Response document, and a copy of the most recent community needs assessment as appendices A, B, and C, respectively. Other appendices as necessary are encouraged. All appendices should be labeled as an appendix (e.g., Appendix A: Notice of Public Hearing) or separated by divider sheets and submitted with the CAP.

Document Title	Appendix Location
Notice of Public Hearing	A
Low-Income Testimony and Agency’s Response	B
Community Needs Assessment	C
PENDING ADDITIONAL APPENDICES	