



CITY OF SIMI VALLEY

MINUTES OF THE ORIENTATION MEETING OF THE
COMMUNITY DEVELOPMENT BLOCK GRANT ADVISORY COMMITTEE

City Hall, Community Room
2929 Tapo Canyon Road
Simi Valley, CA 93063

February 25, 2026

1. CALL TO ORDER

The Community Development Block Grant Advisory Committee Orientation meeting of February 25, 2026, was called to order at 6:31 p.m.

2. ROLL CALL

Present: Committee members Brown, Goitia, and acting Chairperson Cohen

Absent: Chairperson Tolson and Committee member Angelini

3. AGENDA REVIEW

It was the consensus of the Committee to approve the agenda as submitted.

4. APPROVAL OF MINUTES

It was the consensus of the Committee to approve the minutes of the March 17, 2025, Public Hearing Meeting.

5. PUBLIC COMMENTS – None

6. CONTINUED BUSINESS – None

7. NEW BUSINESS

A. THE BROWN ACT AND EX PARTE CONTACTS OR COMMUNICATIONS

Stephanie Gutierrez, Senior Assistant City Attorney, gave two PowerPoint presentations explaining the Brown Act and how Committee members are to handle Ex Parte Contacts and/or Communications.

B. 2025-2029 REGIONAL CONSOLIDATED PLAN PRIORITIES

Lindsey Scaringe, Senior Management Analyst, explained the requirements of the U.S. Housing and Urban Development (HUD) Priorities and City requirements relating to applications for CDBG funding.

C. APPLICATION REQUIREMENTS AND GUIDELINES

Ms. Scaringe gave a PowerPoint presentation explaining the requirements and guidelines for non-profits to follow in order to request funding.

D. CDBG RATING CRITERIA

Ms. Scaringe explained the Rating Criteria used to evaluate applications requesting CDBG funding.

Ms. Scaringe answered questions posed by committee members. Committee member Brown expressed concern about the transition of the Ventura County Area Agency on Aging.

8. ADJOURNMENT

The Orientation Meeting of the CDBG Advisory Committee of the City of Simi Valley was adjourned at 7:21 p.m.

Minutes Prepared by:
Elizabeth Jimenez

City of Simi Valley
Memorandum

March 11, 2026

To: Community Development Block Grant Advisory Committee

From: Department of Environmental Services

Subject: A public hearing to review the funding allocation for the FY 2026-27 Community Development Block Grant program

Staff Recommendation

It is recommended that the Community Development Block Grant (CDBG) Advisory Committee (Committee) review the funding allocation for the 2026-27 CDBG program year and make a preliminary funding recommendation to the City Council for consideration.

Background

Application Process

In January 2026, the City issued a request for projects and programs to be carried out in whole or in part with CDBG funding. On January 22, 2026, a mandatory workshop was held to provide potential applicants with an overview of the CDBG program, application process, and requirements for successful applications. At the conclusion of the application period, the City received one application that is included for your review as Attachment B. The application eligibility review form is presented in Attachment C. Applications for Public Service Programs are funded for a two-year cycle, and Community Development (Capital Improvement) applications are funded for one year. Since FY 2026-27 is year two of the cycle; no new Public Service applications will be considered.

Consolidated Plan Priorities

The Consolidated Plan describes community needs, resources, priorities, and proposed activities the City plans to undertake with Federal, State, and local funding sources over a five-year period. The Consolidated Plan is a U.S. Department of Housing and Urban Development (HUD)-required document adopted by the City. The most recent Consolidated Plan was adopted by the City Council on May 5, 2025, and covers the period of July 1, 2025, through June 30, 2030. The funding priorities identified in the Regional Consolidated Plan are based on a community-wide Needs Analysis. These priorities are listed in Attachment A. Applications requesting funding must be consistent with the Regional Consolidated Plan.

Rating Criteria

The City Council adopted Rating Criteria (Attachment D) used for evaluating CDBG projects. There are a total of six categories: Benefit to Simi Valley Residents; Ability to Perform; Cost Factors; Community Need; Non-Duplication of Effort; and Type of Project.

Issues and Constraints

This year, no issues or constraints have been identified in the FY 2026-27 CDBG application. An issue is an inaccuracy, inconsistency, or omission within the application that would compromise the Committee's ability to rate and rank the activity. A constraint is a potential limitation on the ability of the applicant to perform the activity in compliance with HUD regulations, and additional conditions may be required on the application to ensure conformity with HUD regulations.

Discussion

Available CDBG Funding for Preliminary Allocation

HUD is expected to formally notify the City of its FY 2026-27 CDBG entitlement in April 2026. The funding allocation for FY 2025-26 was \$657,452. The amount used as an estimate for the upcoming funding cycle is \$650,000. The available resources will be divided as follows: Public Service programs (\$97,500); Planning and Administration (\$130,000); and Housing and Community Development projects (\$422,500), in accordance with HUD's maximum expenditure percentages in the categories. There is an additional \$65,796.39 in unspent prior year's funds this year that the City must spend in the Housing and Community Development category, per HUD regulations, for a grand estimated total of \$488,296.39 in this category. Consequently, the estimated available CDBG funds for FY 2025-26 total \$715,796.39.

Of the \$422,500 estimated entitlement available for Housing and Community Development projects, 50 percent is programmed to the City's Department of Public Works Annual Minor Streets Rehabilitation Program. This policy direction was approved by the City Council in July 2013 to allocate a guaranteed portion of this category's funds to cover diminishing government funds allotted for transportation and infrastructure, as well as decreased local tax revenues. If other applications in this category do not receive funding recommendations totaling the other 50 percent of the available funds, any surplus will automatically be awarded to the Minor Streets Rehabilitation Program.

The Public Service category includes, but is not limited to, activities relating to seniors, health, homeless services, or persons with special needs. However, since Public Service applications were not considered this year for the FY 2026-27 funding cycle, they will not be discussed in this report.

There was an addendum added to the CDBG agreement by HUD (Attachment E) for FY 2025-26. As a result, the preparation of subrecipient agreements was delayed while language was updated with these additional requirements. To date, one subrecipient has declined funding, and three subrecipients have not yet signed their agreement. If there are any increases or decreases in funding available to the Public Service category, due

to either the final entitlement award amount or declined awards by subrecipients, funds will be distributed proportionately by staff. These changes will be reflected for the City Council, as they pertain to grant allocations, as authorized at the June 23, 2014, City Council meeting.

The funding requests in the Housing and Community Development category finance public facilities and improvements (e.g. infrastructure improvements, homeless facilities, and energy efficiency). In addition, microenterprise proposals are funded out of this category. This year's Housing and Community Development request totals \$64,000.

At the conclusion of the public hearing, each Committee member will be called upon to provide their vote for the application. The Committee will then deliberate whether to provide funding to the application presented. The City Council will then consider the Committee's recommendation and render a final funding decision at the second public hearing in late April 2026.

The following alternatives are available to the CDBG Advisory Committee:

1. Review the funding allocations for the 2026-27 CDBG program year and make a preliminary funding recommendation to the City Council; or
2. Provide other direction to staff.

Staff recommends Alternative No. 1.

Summary

In response to a request for projects and programs to be funded with CDBG during the 2026-27 program year, the City received one eligible CDBG funding request for a microenterprise. It is recommended that the Community Development Block Grant (CDBG) Advisory Committee (Committee) review the funding allocation for the 2026-27 CDBG program year and make a preliminary funding recommendation to the City Council for consideration.



Stratis Perros
Environmental Services Director

Prepared by: Lindsey Scaringe, Senior Management Analyst

Attachments:

Public Hearing Procedure

Attachment A - Regional Consolidated Plan FY 2025-2029 Priorities

Attachment B - FY 2026-27 CDBG Application

Attachment C - FY 2026-27 CDBG Eligibility Review Form

Attachment D - CDBG Rating Criteria

Attachment E – HUD Agreement Addendum 1

COMMUNITY DEVELOPMENT BLOCK GRANT
ADVISORY COMMITTEE PUBLIC HEARING PROCEDURE

HEARING DATE: MARCH 11, 2026

1. CHAIR: This is the time and place set for a public hearing to receive testimony on applications requesting FY 2026-27 Community Development Block Grant funding.

May we have an oral report on this matter by staff?
2. STAFF: (Report)
3. ANY COMMITTEE MEMBER: (Questions of staff)
4. CHAIR: At this time, we will begin to take public testimony, and any interested party will be heard. Members of the public will be given five minutes for their presentation or comments. If you have not filled out a comment card, please do so now.
5. AUDIENCE: (Presentation and questions with Applicant #1)
(Comments)
6. CHAIR: Is there anyone else in the audience wishing to speak. Please state your name for the record.
6. CHAIR: Prior to closing the public hearing, are there any comments or questions from members of the Committee to staff?
7. ANY COMMITTEE MEMBER: (Comments)
8. CHAIR: The hearing is now closed. Are there any additional comments the Committee wishes to make regarding the applications requesting FY 2026-27 Community Development Block Grant funding?
9. ANY COMMITTEE MEMBER: (Committee discussion regarding the applications requesting FY 2026-27 Community Development Block Grant funding.)
10. CHAIR: The Chair will now entertain a motion.

11. ANY COMMITTEE
MEMBER: [CDBG Advisory Committee Actions (by motion of any
Committee Member)]:
1. Forward preliminary CDBG funding recommendation for the projects to be conducted during FY 2026-27 to the City Council for consideration; or
 2. Provide other direction to staff.
12. CHAIR: Proceed to the next item on the agenda.

Ventura County Regional Five-Year Consolidated Plan FY 2025-2029

City of Simi Valley Priorities

High

1. **Development of New Affordable Housing-** There is an acute need for affordable housing for low- and moderate-income households.
2. **Housing Rehabilitation-** There is a need to maintain adequate and quality housing stock, especially for low- and moderate-income households.
3. **Housing Services-** In an effort to support first-time homebuyers and households with children, provide access to financial and non-financial support and assistance to accessing the homeownership market through program's such as down payment and closing cost assistance, homebuyers coaching, and subsidized property inspections.
4. **Housing Stability-**Through tenant-based rental assistance and diversion programs, provide short- and medium-long term rental assistance to extremely low-income, and low-income households who are at-risk of homelessness.
5. **Homelessness-** In collaboration with the Ventura County Continuum of Care, provide holistic and complete support to households experiencing or at-risk of experiencing homelessness through the provision of rapid re-housing, emergency shelter and supportive services.
6. **Supportive Services-** Provide targeted services for youth, elderly, and other higher need populations within the region.
7. **Fair Housing Services-** Provide training to landlords and banking institutions and services to individuals and households experiencing housing discrimination or at-risk of experiencing housing discrimination.
8. **Public Facility Maintenance-** Maintain high quality public facilities to serve the needs of low- and moderate- income households.

Low

9. **Street Improvements and Infrastructure-** Maintain streetscapes and sidewalks in low- and moderate-income neighborhoods.
10. **Economic Support for Small Businesses and Job Training-** Promote small business development and provide job training to meet the economic needs within the community.
11. **Disaster Planning and Recovery-** Disaster planning and recovery activities after severe weather, fire and earthquakes.



February 11, 2026

Dear Julia and Lindsey,

On behalf of Upwards and the Boost team, thank you for your continued support and guidance throughout this partnership. We appreciate the City of Simi Valley's Community Development team's commitment to strengthening our local childcare ecosystem.

We are pleased to submit our proposal to expand the Boost program for a second year in Simi Valley. We look forward to being able to launch our inaugural year, and hopefully build on the momentum in year 2.

As you know, Boost empowers low-to-moderate income in-home childcare providers with personalized coaching and digital tools to optimize operations, increase revenue, and expand access to quality, affordable childcare. By providing these services at no cost to providers, Boost strengthens both small businesses and the local economy while creating jobs and increasing childcare availability for working families.

We are requesting \$64,000 in CDBG funds to support 8 family childcare providers, create 3 new jobs, and serve over 100 families in Simi Valley.

Boost treats government funding as a bridge to sustainability, not a permanent solution. By the end of the program, providers gain the tools and confidence to sustain their businesses independently. True to the principle of "teach someone to fish," Boost ensures childcare providers remain self-sufficient long after their funded year concludes. All participating providers retain free access to Upwards' childcare management system beyond the program year.

Please don't hesitate to reach out if you need additional information. I'm happy to discuss further details at 213-400-3438.

Thank you for your partnership and consideration.

A handwritten signature in black ink, appearing to read 'MF', is written over a horizontal line.

Mélanie Faure

Community Impact Manager

melanie@upwards.com | 213-400-3438



FY 2026-27 COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) APPLICATION

(Please refer to the “Guidelines and Requirements” to complete this application.)

NOTICE OF FUNDS AVAILABLE (NOFA)

ONLY CAPITAL IMPROVEMENT PROJECT APPLICATIONS IN THE HOUSING/COMMUNITY DEVELOPMENT CATEGORY WILL BE ACCEPTED FOR FY 2026-27. PUBLIC SERVICE APPLICATIONS WILL **NOT** BE ACCEPTED FOR THIS CDBG FUNDING CYCLE.

Capital Improvement applications, if funded, will be approved for a one-year cycle (FY 2026-27 only). The applicant must demonstrate the project is “shovel-ready” and that all leveraged funding is secured.

APPLICATION DEADLINE

Applications are due to the City of Simi Valley, Environmental Services Department, Attn.: Lindsey Scaringe, Senior Management Analyst, 2929 Tapo Canyon Road, Simi Valley, CA 93063, **by Wednesday, February 11, 2026**. Applications are considered incomplete if all exhibits and mandatory attachments are not submitted together in one package by the application deadline. Postmarks will not be accepted. **Late or incomplete applications will not be considered.**

FORM OF APPLICATION

The CDBG FY 2026-27 application is only available to organizations that attend the mandatory application workshop on January 22, 2026.

All required attachments must be provided with the application.

Complete all computer-generated forms and narratives in this application package. Attach additional supporting documentation in the order requested on the Application Checklist.

USE OF FUNDS

Pursuant to a written agreement between the City and Subrecipients of CDBG Capital Improvement Grants, CDBG funds may only be used to reimburse capital improvement providers for direct costs incurred in accordance with 2 CFR Part 200. Indirect costs and cost allocation plans will not be considered. Only direct costs with appropriate supporting documentation such as procurement, contract, invoice, and proof of payment will be considered for reimbursement using grant funds.

All applicants are encouraged to call Senior Management Analyst Lindsey Scaringe at (805) 583-6749 for assistance with questions regarding the preparation of your request.

- ▶ STAFF MAY REQUIRE ADDITIONAL INFORMATION to accurately present the application request and/or require the applicant to submit additional information not specifically stated in this application.
- ▶ STAFF MAY REQUIRE AN IN-PERSON MEETING at application review time.
- ▶ PREMATURELY COMMITTING OR EXPENDING FUNDS. Project costs are not eligible for CDBG reimbursement if they have been committed or spent prior to an Environmental Clearance. After the execution of the Subrecipient contract, approved activity expenses incurred after July 1st of the CDBG Program Year may be submitted for reimbursement.
- ▶ AN ENVIRONMENTAL REVIEW IS REQUIRED FOR EACH PROJECT RECEIVING CDBG FUNDING. The City will conduct Environmental Reviews following HUD's approval of the project.
- ▶ THE APPLICANT WILL COMPLY with all Federal, State, and Local regulations, policies, and procedures affecting the Community Development Block Grant Program.
- ▶ IF SELECTED FOR A CDBG GRANT, the applicant will provide reports detailing activity accomplishments to the City of Simi Valley on a quarterly basis (10 days following the end of each quarter) from the beginning of the grant period (July 1, 2026) to the conclusion of the grant period (June 30, 2027).
- ▶ A SITE VISIT MAY BE CONDUCTED. City staff may request a tour of the organization and/or the proposed project site. Organizations will be notified a minimum of 24 hours prior to any formal site visit.
- ▶ TO THE BEST OF MY KNOWLEDGE AND BELIEF, THE INFORMATION CONTAINED IN AND ATTACHED TO THIS APPLICATION IS COMPLETE, ACCURATE, TRUE, AND CORRECT. THE APPLICATION HAS BEEN DULY AUTHORIZED BY THE GOVERNING BODY OF THE APPLICANT. THE APPLICANT WILL COMPLY WITH ALL FEDERAL, STATE, AND LOCAL LAWS AND REGULATIONS IF FUNDING IS APPROVED.

APPLICATION ACKNOWLEDGEMENT

I have read and understand the above information:

ORGANIZATION NAME: Upwards Care, Inc.

PROJECT NAME: Boost

NAME AND TITLE OF AUTHORIZED PERSON: Mélanie Faure

SIGNATURE OF AUTHORIZED PERSON: 

DATE SIGNED: February 11, 2026



FY 2026-27 COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) APPLICATION

Please use this computer-generated form or complete the online form. **Handwritten applications will not be accepted.**

Complete the *Application Submittal Checklist* to ensure you have included everything required before submitting the application. **The *Application Submittal Checklist* must be turned in with the application.**

1) Name of Organization: _____

2) Name/Title of Workshop Attendee: _____

3) Mailing Address where correspondence about this application is to be sent:

Street	City	State	Zip
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4) Physical address where proposed project is conducted (if different than mailing address):
 There is more than one location (enter information under Question 29)

Street	City	State	Zip
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5) Physical address where project records will be kept for monitoring purposes:

Street	City	State	Zip
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6) Federal Tax I.D. No. _____

7) CA Franchise Tax Board I.D. No. _____

8) Unique Entity Identifier (UEI) No. _____

9) Contact Person Information:

Name/Title: _____

E-mail: _____

Office Phone Number: _____

Cell Phone Number: _____

10) Authorized Person Information (if same as Contact Person, note "same" below):

Name/Title: _____

E-mail: _____

Office Phone Number: _____ Cell Phone Number: _____

11) Program Name: _____

12) Briefly describe the proposed project and what goal(s) it is intended to achieve:

13) Please check the box that best identifies the nature of the project in Simi Valley¹:

Start-Up One-Time Continuing Expansion

14.a) Identify the specific need being addressed by the proposed project in the FY 2025 – 29 Regional Consolidated Plan Priorities:

High

1. Development of New Affordable Housing
2. Housing Rehabilitation
3. Housing Services
4. Housing Stability
5. Homelessness
6. Supportive Services
7. Fair Housing Services
8. Public Facility Maintenance

Low

9. Street Improvements and Infrastructure
10. **Economic Support for Small Businesses and Job Training**
11. Disaster Planning and Recovery

Example: *Proposed project will make physical improvements to a homeless shelter to bring it into compliance with current Building & Safety standards to meet emergency ingress and egress requirements. Therefore, the project addresses Priority #5, to improve the safety of the homeless population.*

14.b) Objectives and Outcomes:

(Check one box in each table that best reflects your project's objectives and outcomes.)

Objectives	Check One
Suitable Living Environment	<input type="checkbox"/>
Decent Housing	<input type="checkbox"/>
Economic Opportunities	<input type="checkbox"/>

Outcomes	Check One
Availability/Accessibility	<input type="checkbox"/>
Affordability	<input type="checkbox"/>
Sustainability	<input type="checkbox"/>

¹ Start-Up – New project/program; One-Time – funding request will fulfill a one-time expenditure need; Continuing – funding request is to continue a previously funded project/program; or Expansion – an existing or a previously-funded project/program that is expanding in scope, not just that more people are served.

15) National Objective:
(Select one category, and, if applicable, one appropriate subcategory)

Low- and Moderate-Income Limited Clientele

- A) Presumed Group: Elderly persons
Abused children
Battered spouses
Homeless persons
Severely disabled adults
Illiterate adults
Migrant farm workers
Persons with AIDS

B) Beneficiaries are Low- and Moderate-Income (51% or more)

C) Beneficiaries are Low- and Moderate-Income (100%)

Low- and Moderate-Income Area, including the following Census Tract Block Groups:

16) Please identify unduplicated (new clients) persons/households for FY 2026 -27:

Check One:

Persons Households

Total Number of Persons or Households to be served by the proposed project: _____

a) Of the Total Number to be served, how many are Simi Valley residents: _____

b) Of the Total Number to be served, how many are low/moderate-income: _____

17) Please identify any special target populations served by this proposed project (*e.g. seniors, youth, homeless, severely disabled, etc.*):

18) Total Project Budget: \$_____ [Line 18 must equal the sum of lines 19.a), b), and c).]

a) CDBG Request: \$_____

b) Leveraged Funds²: \$_____

c) Other Funds³: \$_____

19) Identify the amount, source, and approximate date of availability of all **Leveraged** Funds:

Identify the amount, source, and approximate date of availability of all **Other** Funds:

² Leveraged Funds cannot be an organization's annual operating budget or other federal funds.

³ Other funds that are not eligible as Leveraged funds, such as Organization's Operating Budget or other Federal funds.

20.a) Prior CDBG Funding:

Has the applicant organization previously received Community Development Block Grant funds from the City of Simi Valley in the past five (5) years

YES NO

If yes, please indicate the year(s) the funds were received, the amount(s), and the specific purpose(s) for which the funds were received:

Fiscal Year	Amount of Grant	Purpose – Project Name
	\$	
	\$	
	\$	
	\$	
	\$	

20.b) Please indicate below how this current request differs from these past requests:

Additional Project Information

The CDBG Advisory Committee ranks applications based on six (6) criteria. To assist them with this task, please answer the following questions about the proposed project:

- 21) Referring to your response to Question 15.a., describe how the proposed project fulfills the need identified from the Regional FY 2025 - 29 Consolidated Plan Priorities:

- 22) Describe how the proposed project benefits the residents of Simi Valley or enhances a low/moderate-income area in the City:

- 23) Demonstrate that the organization has: the expertise to carry out the proposed project (including any certifications necessary); the ability to advance funds to the proposed project since CDBG is a reimbursement program; and success in complying with grant funding requirements:

- 24) Demonstrate that CDBG funds are being leveraged to the maximum extent practicable and are being used efficiently to assist as many low/moderate-income persons or households as possible:

- 25) Describe how it was determined that the proposed project is fulfilling a need not duplicated by any other organization serving Simi Valley:

- 26) Provide a brief description of the history, goals, and accomplishments of this organization, particularly with respect to services provided to the citizens of Simi Valley:

CAPITAL IMPROVEMENT PROJECT WORK SCHEDULE

Provide your Project Work Schedule in the tables below. This information will be used to track project progress through Progress Reports. The projected goal/outcome must be broken down quarterly, at a minimum.

Project Title: _____

TIME FRAME	TASK/DELIVERABLE	EXPENDITURE	PERSON/POSITION RESPONSIBLE
1 st Quarter: July-September		\$	
2 nd Quarter: October-December		\$	
3 rd Quarter: January-March		\$	
4 th Quarter: April-June		\$	

MILESTONE	TARGET DATE	PERCENT COMPLETED	COMMENTS
Phase 1: Preparation of Bid Document		%	
Phase 2: Pre-Bid		%	
Phase 3: Bid Opening		%	
Phase 4: Contract Award		%	
Phase 5: Pre-Construction		%	
Phase 6: Mid-Construction		%	
Phase 7: Construction Completed		%	
Phase 8: Post Construction/Labor File Review		%	

INFORMAL PROCUREMENT

~ATTACH BIDS RECEIVED IN WRITING~

Item Description / Specifications: _____	Quantity: _____
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OBTAIN AT LEAST THREE (3) BIDS OR PRICE QUOTATIONS

Vendor Name, Address, Phone, and Contact Person	Bid Method	Unit Cost (Quote)	Minority/Women Owned Business (Check All that Apply)	TOTAL (Contract Price)
	Written	\$	<input type="checkbox"/> Minority <input type="checkbox"/> Women <input type="checkbox"/> Small/Disadvantaged <input type="checkbox"/> None	\$
	Written	\$	<input type="checkbox"/> Minority <input type="checkbox"/> Women <input type="checkbox"/> Small/Disadvantaged <input type="checkbox"/> None	\$
	Written	\$	<input type="checkbox"/> Minority <input type="checkbox"/> Women <input type="checkbox"/> Small/Disadvantaged <input type="checkbox"/> None	\$

Name of Person Obtaining Bids, Title

Date

Signature

The following budget is to be completed for ALL applications:

CITY OF SIMI VALLEY CDBG 2026-27 APPLICATION LINE ITEM BUDGET						
APPLICANT NAME:	Upwards Care, Inc					
PROJECT NAME:	Boost					
(Round amounts to the nearest whole dollar)						
Column A Budget Item Description	This column will auto-populate. Do Not Enter Data	Column C Leveraged Funds*	Column D Other Funding Sources (Operating Budget; Federal Funds)	Column E CDBG Funds	Column F Line Item Priority (1, 2, 3, etc.)	Column G Comments
	Column B Project Budget (B=C+D+E)					
Direct Service Expenses						
Boost Team Salary: This funding supports the	\$54,457	\$ -	\$ -	\$54,400	\$ 1	
Boost Team Fringe Benefits: This budget covers	\$ 9,543	\$ -	\$ -	\$ 9,600	\$ 2	If Fringe are not allowed, Upwards will request \$64,000 to be applied entirely to salary (1) as Upwards will absorb Fringe.
Training Materials	4416	4416				
Equipment	2944	2944				
Provider Marketing	3551	3551				
Family Marketing	736	736				
Technology Costs	3411	3411				
Office Supplies	460	460				
Payment Processing Fee	147	147				
	\$ -	\$ -	\$ -	\$ -		
	\$ -	\$ -	\$ -	\$ -		
	\$ -	\$ -	\$ -	\$ -		
Direct Service Expenses Total	\$79,665	\$ 15,665	\$ -	\$ 64,000		
Indirect Service Expenses						
		\$ -	\$ -			
	\$ -	\$ -	\$ -			
Indirect Service Expenses Total		\$ -	\$ -	\$ -		
PROJECT EXPENSES TOTAL	\$ 79,665	\$ 15,665	\$ -	\$ 64,000		
Type of Leverage and Other Funds*						
*List all leveraged and other fund sources, amounts, dates available, and fund source. Specify how other federal funds or the organization's operating budget will be used for this project under item 25 of the application.						
Description of Type of Funds	Amount	Date Available	Source of Funds			
Upwards' Match - Non-personnel costs	\$ 15,665	Upon Award	including Training Materials (and translations), Equipment, Marketing for Providers, Marketing for Families, Cost of Payments, Technology Costs and Office Supplies.			
	\$ -					
	\$ -					
	\$ -					
Leverage & Other Funds Total (Must match Sum of Columns C & D)	\$ 15,665					



12. Briefly describe the proposed project and what goal(s) it is intended to achieve:

The Boost Program helps home-based child care providers build stable, successful businesses so more families can access reliable, high-quality care. Many providers struggle with financial instability, unpredictable enrollment, and overwhelming administrative tasks, leading to high turnover and fewer available child care slots. Boost changes that by providing coaching, digital tools, and structured business training to help providers stabilize income, expand services, and improve care quality.

Through personalized coaching and technology, providers gain the skills they need to manage finances, market their services, and navigate licensing requirements. The program also equips them with technology tools to streamline operations, improve efficiency, and grow their businesses. As providers expand, Boost helps them hire and retain teaching assistants, creating jobs and increasing the number of child care slots available in the community.

In equipping child care providers with the tools and knowledge they need to succeed, Boost ensures more child care slots are available, parents can remain in the workforce, and communities benefit from stronger local economies. Investing in Boost is not just about supporting small businesses, it is about solving the child care crisis at its root.

21. Referring to your response to Question 15.a., describe how the proposed project fulfills the need identified from the Regional FY 2025 - 29 Consolidated Plan Priorities

Priority: Economic Support for Small Businesses and Job Training

Boost provides a practical, results-driven approach to help providers stabilize and grow their businesses. We do this through three key supports: personalized coaching, smart technology, and business training.

1. Personalized Coaching - Providers get direct access to Care Specialists who have run childcare businesses themselves. These specialists work side by side with providers to:

- Create custom business strategies to increase revenue and fill open slots.
- Navigate licensing and compliance so providers avoid costly mistakes.
- Offer hiring support to help providers bring on teaching assistants as they grow.
- Assist with budgeting, pricing, and financial planning to ensure long-term stability.

2. Childcare Management System (CMS) - Running a childcare business means juggling enrollment, payments, attendance tracking, parent communication, and curriculum planning—often without the right tools. Boost gives providers access to Upwards' Childcare Management System (CMS), a digital platform designed to:



- Automate billing, attendance, and enrollment so providers get paid on time and spend less time on paperwork.
- Simplify curriculum planning with a built-in lesson planner that helps providers create structured learning environments in less than 45 minutes a week.
- Increase enrollment and engagement by connecting providers with families through marketing and communication tools.
- Note: Boost graduates can continue to use the CMS beyond the program year for free.

3. Boost Curriculum - Many childcare providers are passionate about early education but struggle with the business side of things. Boost offers a structured curriculum that gives them the skills to:

- Set prices, manage finances, and access subsidies to ensure financial stability.
- Market their business effectively to attract and retain families.
- Hire, train, and manage staff so they can expand without burning out.
- Improve parent communication and engagement to build long-term relationships.

This training is practical, not theoretical. Every module is designed to be immediately useful in a provider's day-to-day operations.

22. Describe how the proposed project benefits the residents of Simi Valley or enhances a low/moderate-income area in the City:

The Boost Program will directly increase the number and stability of licensed home-based childcare providers in Simi Valley, creating more available childcare slots in areas where demand currently exceeds supply. By helping providers grow their businesses through licensing support, business coaching, and access to Upwards' childcare management technology, the program strengthens the local childcare system. This benefits working families, particularly those with low to moderate incomes by improving access to affordable, high-quality care that fits nontraditional work hours. Boost also helps providers generate consistent income, retain staff, and reduce administrative burden, making it easier for them to remain in operation long term. The program supports economic development by enabling more parents to work and ensuring that childcare providers can operate as sustainable microenterprises within the community.

23) Demonstrate that the organization has: the expertise to carry out the proposed project (including any certifications necessary); the ability to advance funds to the proposed project since CDBG is a reimbursement program; and success in complying with grant funding requirements: Upwards has extensive experience working with government partners and administering federal funds. We operate Federal, State, and Local programs and have become very familiar with government compliance, monitoring, and reporting requirements.



On the Federal level, Upwards is currently facilitating childcare tuition payments and matching services for Army and Army National Guard Reservists. This program is broad in geographic scope and has required speedy product and tech adaptations to serve the unique needs of non-traditional care for military families. At the State level, Upwards is contracted with California to administer childcare subsidies to income-eligible families. This is funded through the Child Care and Development Block Grant (CCDBG).

On the Local level, Upwards has successfully implemented the Boost program with the support of CDBG funding to make significant impacts in over 30 cities and counties including: San Jose, Escondido, Chula Vista, Garden Grove, Palo Alto, San Mateo, CA; Greeley, CO; Miami Beach, Clearwater, FL; Clackamas County, OR; Bellevue, Bremerton WA; Tonawanda, NY; West Jordan, UT and soon, Simi Valley, CA. In 2024, Upwards partnered with 12 cities to support 220 providers and assisted them in creating 129 new jobs— far exceeding all projected outcomes.

Our team includes experts in early childhood education, business operations, and technology solutions tailored specifically to support family childcare providers. With a proven track record of helping providers improve quality, expand capacity, and achieve financial sustainability, Upwards has established itself as a leader in the childcare industry.

24) Demonstrate that CDBG funds are being leveraged to the maximum extent practicable and are being used efficiently to assist as many low/moderate-income persons or households as possible: Upwards' own contributions to the program will cover all non-personnel costs including Training Materials (and translations), Equipment, Marketing for Providers, Marketing for Families, Cost of Payments, Technology Costs and Office Supplies. The total cost to support each child care microenterprise for a full year is about \$10,000-\$12,000. However, we only request \$8,000 per microenterprise and in the event that additional funding is needed to hit the program's goals, Upwards will cover any additional expenses with our in-kind matching program. The Boost program is free to all participating providers and the families they serve. Upwards' substantial in-kind contributions and operational support underscore our dedication to providing the necessary resources for the program's success.

25) Describe how it was determined that the proposed project is fulfilling a need not duplicated by any other organization serving Simi Valley: Boost is not just another small business program or workforce initiative. It is a specialized, provider-focused solution that helps home-based childcare providers grow their businesses, integrate technology, and connect directly with families. Most existing programs focus on licensing assistance or general business resources but fail to address the daily operational challenges childcare providers face. Many providers struggle with low enrollment, financial instability, and administrative burdens without access to support.



Childcare listing services only provide basic directories without direct booking tools or family-matching support. Providers are left relying on word-of-mouth and outdated marketing methods to fill open spots. Some platforms even limit how many families can search for care each day, making it harder for parents to find the right provider.

On the provider side, most existing programs offer one-time training materials, but do not provide real-time business coaching, digital tools, or enrollment support. They leave providers to figure out marketing, finances, and family outreach on their own.

How Boost Fills the Gap

Boost offers:

- One-on-one business coaching to help providers increase revenue, stabilize enrollment, and market their services.
- A childcare management system that simplifies scheduling, payments, and compliance tracking.
- A proprietary family-matching algorithm that directly connects providers with families looking for care.
- Ongoing technical and operational support to help providers stay in business and expand.

Unlike other programs that leave providers to navigate challenges alone, Boost offers real-time support to ensure childcare businesses thrive and families find care quickly and easily.

26) Provide a brief description of the history, goals, and accomplishments of this organization, particularly with respect to services provided to the citizens of Simi Valley:

Founded in 2017, Upwards is the largest network of licensed home-based childcare providers in the United States. We are a tech-powered early-learning childcare marketplace for families, providers, employers, and municipalities with a mission to solve care for good. People from all over the country have joined our network to realize our vision of creating a world where every family has access to quality, affordable childcare, and where caregivers thrive. We do this by partnering with key stakeholders who contribute to the success of an early care system: childcare providers, families, private businesses, and public government entities.

Our work with federal, state, and local governments is focused on implementing economic development programs that use technology powered solutions to reach underserved populations and support the early education of our youth, combating generational poverty and advancing social equity in our communities.

On the Federal level, Upwards is currently facilitating childcare tuition payments and matching services for Army and Army National Guard Reservists. At the State level, Upwards is



contracted with California to administer childcare subsidies to income-eligible families. This is funded through the Child Care and Development Block Grant (CCDBG).

On the Local level, Upwards' CDBG-eligible Boost program has made significant impacts in over 30 cities and counties. In **San Jose**, 133 low- to moderate-income providers were supported, creating 39 new jobs within five months and serving over 400 families, prompting the city to recommend a second year. In **Bellevue**, the inaugural year supported 24 in-home providers, created 7 teaching assistant jobs, and added 21 licensed child care spots. **Palo Alto** saw a 40% revenue increase for providers, nearly a quarter hired teaching assistants, and over 125 families found care; the Year 2 expansion is already creating new jobs ahead of schedule. In **San Mateo**, 8 home daycares exceeded participation goals, 3 hired teaching assistants resulting in 5 new jobs, 80% increased capacity, and over 200 families were supported. In **Escondido**, the second year builds on 21 existing providers and 39 new ones, with providers achieving a 45% revenue increase and hiring 10 teaching assistants in the first year, surpassing projections. **We are looking forward to launching Boost in Simi Valley for PY25-26.**

With a proven track record of helping providers improve quality, expand capacity, and achieve financial sustainability, the Boost team has reached projected outcomes on time and on budget.

Not Applicable.

Upwards is a for-profit organization* and is applying for CDBG funds under HUD's eligible activity of Economic Development. As defined by the Code of Federal Regulations, in [24CFR570.201 Basic Eligible Activities, letter \(o\)](#) sub-recipients can include for-profits.

“(o)

(1) The provision of assistance either through the recipient directly or through public and private organizations, agencies, and other subrecipients (**including nonprofit and for-profit subrecipients**) to facilitate economic development by:

- (i) Providing credit, including, but not limited to, grants, loans, loan guarantees, and other forms of financial support, for the establishment, stabilization, and expansion of microenterprises;
- (ii) Providing technical assistance, advice, and business support services to owners of microenterprises and persons developing microenterprises; and
- (iii) Providing general support, including, but not limited to, peer support programs, counseling, child care, transportation, and other similar services, to owners of microenterprises and persons developing microenterprises.

(2) **Services provided this [paragraph \(o\)](#) shall not be subject to the restrictions on public services contained in [paragraph \(e\)](#) of this section.**

(3) For purposes of this [paragraph \(o\)](#), “persons developing microenterprises” means such persons who have expressed interest and who are, or after an initial screening process are expected to be, actively working toward developing businesses, each of which is expected to be a microenterprise at the time it is formed.

(4) Assistance under this [paragraph \(o\)](#) may also include training, technical assistance, or other support services to increase the capacity of the recipient or subrecipient to carry out the activities under this [paragraph \(o\)](#).”

Due to Upwards for-profit status as a private sector company, a Tax Return has been omitted from this application. Upwards understands certain information is required for review of this application and can send other forms of documentation to evaluate its financial viability.

*The Community Program in this proposal does not generate any income for Upwards.



CITY OF SIMI VALLEY

CDBG Eligibility Review Form

Grantee:

Program Year:

Issues or Constraints:

Funding Source:

Agency Information

Agency Name:

Agency Type:

Address:

(Number and Street)

(City)

(State)

(Zip)

Contact Person:

Title:

Phone Number:

Email:

Project Information

Project Title:

New Project: Yes No

Project Type:

Service Location:

(If different from above) (Number and Street)

(City)

(State)

(Zip)

Benefit to Simi Valley Residents (50 points)

Project Description:

Ability to Perform (50 points)

Total number of late progress reports over a 1-year period?

Funds Request

Cost Factors (30 points)

Amount Requested:

Fund Type:

Use of Funds: Personnel Non-Personnel Capital

Leveraged Funds:

Other Funds:

Total Project Budget:

Ratio of CDBG Request to Leveraged Funds:

Total number of people to be served:

Number of low/moderate-income:

Number of Simi Valley residents:

Ratio of total served to CDBG funds requested:

Ratio of low/moderate-income served to CDBG funds requested:

Eligibility Review

Community Needs (60 points)

Priority Need Category:

Matrix/Title/Eligibility Citation:

Describe how the proposed project is eligible under the selected citation:

Is the proposed project an eligible use of CDBG funds? Yes No

CDBG funding during the past five fiscal years:

National Objective Review

National Objective/Citation:

Describe how the proposed project will meet a National Objective:

Does the proposed project meet a CDBG National Objective? Yes No

Non-Duplication of Efforts (30 points)

Conformance with Consolidated Plan Goals

Does the Project meet one or more of the Consolidated Plan Goals? Yes No

If yes, provide a description of how this activity meets a Consolidated Plan Goals:

Objective Category:

- Decent Housing
- Suitable Living Environment
- Economic Opportunity

Outcome Category:

- Availability/Accessibility
- Affordability
- Sustainability

Performance Measurement Type:

Proposed Goal/Accomplishment:

Type of Project (20 points)

Type of Project:

Special Conditions

Special Conditions:

Davis Bacon Compliance

Obtain Income Documentation for Applicants

Documentation of Jobs Created

Procurement Documentation Required

Obtain Age Documentation

Sustainability

Provide other mitigation conditions below:

Other:

Issues or Constraints

Issues

Constraints

Issue: An inaccuracy, omission or inconsistency within the application which would compromise the Committee's ability to rate the activity.

Constraint: A potential limitation on the ability of the applicant to perform the activity in compliance with HUD regulations; additional conditions may be required on the application to ensure conformity with HUD regulations

Service Area (LMA Activities)

Proposed Service Area:

Target Area: Applicable Not Applicable

Census Tract	Block Group	L/M Population	Total Population	L/M %
TOTAL:				

Service Area (LMA Activites)

National Objective Key		Entitlements	States
LMA	Low-and moderate-income (Low/Mod) Area Benefit	570.208(a) (1)	570.483(b) (1)
LMAFI	Low/Mod Area Benefit Community Development Financial Institution	570.208(d) (6) (i)	570.483(e) (4)
LMASA	Low/Mod Area Benefit Neighborhood Revitalization Strategy Area	570.208(d) (5) (i)	570.483(e) (5)
LMC	Low/Mod Limited Clientele	570.208(a) (2)	570.483(b) (2)
LMCMC	Low/Mod Limited Clientele, Microenterprise Development	570.208(a) (2) (iii)	570.483(b) (2) (iv)
LMCSV	Low/Mod Limited Clientele, Job Service Benefit	570.208(a) (2) (iv)	570.483(b) (2) (v)
LMH	Low/Mod Housing	570.208(a) (3)	570.483(b) (3)
LMHSP	Low/Mod Housing, CDFI or Neighborhood Revitalization Strategy Area	570.208(d) (5) (ii) & (d) (6) (ii)	570.483(e) (5)
LMJ	Low/Mod Job Creation or Retention	570.208(a) (4)	570.483(b) (4)
LMJFI	Low/Mod Job Creation or Retention, Public Facility/Improvement Benefit	570.208(a) (4) (vi) (F)	570.483(b) (4) (iv) (F)
LMJP	Low/Mod Job Creation or Retention, Location Based	570.208(a) (4) (iv) (B)	570.483(b) (4) (vi) (B)
SBA	Slum and Bight Area	570.208(b) (1)	570.483(c) (1)
SBS	Slum and Bight Spot	570.208(b) (2)	570.483(c) (2)
SBR	Slum and Bight Urban Renewal/Planning Only Activities (States)	570.208(b) (3)	570.483(c) (3)
URG	Urgent Needs	570.208(c)	

Prepared By: Elizabeth Jimenez

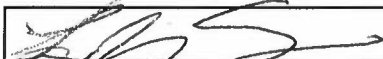
Title: Office Specialist II

Signature: 

Date: 3/5/2026

Prepared By: Lindsey Scaringe

Title: Sr. Management Analyst

Signature: 

Date: 3/5/2026

Reviewed By: Julia Ramirez

Title: Administrative Officer

Signature: 

Date: 3/5/2026

CDBG Rating Criteria

1) Community Need (60 points)

The Consolidated Plan is a HUD-required document adopted by the City describing the framework for how federal and other funding sources will be spent over a five-year period to address a community's identified needs. The most recent Consolidated Plan was adopted by the City Council on May 5, 2025 and covers the period July 1, 2025 through June 30, 2030. The funding priorities identified in the Consolidated Plan are based on a community-wide needs analysis. The funding priorities identified are based on a community-wide needs analysis. There is a priority system consisting of High and Low. A list of the High and Low priority needs identified have been included in a one-page summary.

The applicant must demonstrate that there is a need for their particular project. It is suggested that those projects serving higher need categories receive more points than those serving lower need categories.

2) Benefit to Simi Valley Residents (50 points)

The City Council has always been concerned with allocating CDBG funds to assist Simi Valley residents in particular. This category asks that the project or provision of service be in Simi Valley or that the services are conveniently located to Simi Valley. If the proposal is not a service, but rather an upgrade to a low/moderate income area in Simi Valley, the project should be viewed as benefiting Simi Valley residents as it is an improvement to the City. More points should be given to a project that demonstrates meeting the needs of Simi Valley residents.

3) Ability to Perform (50 points)

The purpose of this category is to determine the degree of an organization's readiness to implement the proposed project. This will include identification of the in-house expertise available, the ability to continue the project after CDBG funds are expended, the organization's budget from their balance sheet, and a synopsis of their history with meeting grant requirements. Those organizations that demonstrate a prolonged ability to fulfill their obligations should get more points in this category than those entities that are lesser known or have difficulty showing they can continue the project beyond the CDBG award. Late reports in the prior year will negatively affect the overall average scores.

4) Cost Factors (30 points)

The per capita cost factor should indicate efficient use of CDBG funds. This cost factor is used to indicate how much CDBG funding would be spent per person or per household level as well as the cost per person or household including all funding sources. Another consideration is the degree that the applicant is leveraging CDBG funds requested with other funding sources to show the level of dependence on CDBG. More points should be distributed to projects that have lower costs and assist more people or households and those that have a higher level of leveraged funds.

5) Non-Duplication of Effort (30 points)

In order to ensure the efficient use of CDBG funds, this category is to determine if there is duplication of effort among the different projects. The two factors to consider in this category are that the proposal not be duplicated by another application in the same year and that it not be duplicated by any other entity in Simi Valley or providing services to Simi Valley. Some leeway should be given to those projects that demonstrate that the need is not fully met by other entities. More points should be given to projects that meet identified needs without duplicating efforts of another agency rather than those projects that have more than one agency fulfilling the same need.

6) Type of Project (20 points)

HUD allows continued funding of projects that were previously funded through CDBG without demonstrating a verifiable increase in service. A continuing project and a project that will take multiple years to complete are not to be considered the same thing. For example, the warehouse expansion for our local food bank was completed in phases over three years and is not considered a continuing project. However, funds for maintaining a senior nutrition program without continually serving more seniors would be considered a continuing project. The purpose of this category is to give more points to one-time, start-up, and expansion projects than a continuing project.

CDBG Point Rating Ranges

Point Rating Criteria & Maximum Total Points (240)	Excellent	Good	Average	Fair	Poor
Community Need (60)	48-60	36-47	24-35	12-23	<12
Benefit to Simi Valley Residents (50)	41-50	31-40	21-30	11-20	<11
Ability to Perform (50)	41-50	31-40	21-30	11-20	<11
Cost Factors (30)	24-30	18-23	12-17	6-11	<6
Non-Duplication of Effort (30)	24-30	18-23	12-17	6-11	<6
Type of Project (20)	16-20	12-15	8-11	4-7	<4

U.S. Department of Housing and Urban Development — Federal Award Agreement

ADDENDUM 1. POLICY REQUIREMENTS

If applicable:

1. The Recipient shall not use grant funds to promote “gender ideology,” as defined in Executive Order (E.O.) 14168, Defending Women from Gender Ideology Extremism and Restoring Biological Truth to the Federal Government;
2. The Recipient agrees that its compliance in all respects with all applicable Federal anti-discrimination laws is material to the U.S. Government’s payment decisions for purposes of section 3729(b)(4) of title 31, United States Code;
3. The Recipient certifies that it does not operate any programs that violate any applicable Federal anti-discrimination laws, including Title VI of the Civil Rights Act of 1964;
4. The Recipient shall not use any grant funds to fund or promote elective abortions, as required by E.O. 14182, Enforcing the Hyde Amendment; and that,
5. Notwithstanding anything in the NOFO or Application, this Grant shall not be governed by Executive Orders revoked by E.O. 14154, including E.O. 14008, or NOFO requirements implementing Executive Orders that have been revoked.
6. The Recipient must administer its grant in accordance with all applicable immigration restrictions and requirements, including the eligibility and verification requirements that apply under title IV of the Personal Responsibility and Work Opportunity Reconciliation Act of 1996, as amended ([8 U.S.C. 1601-1646](#)) (PRWORA) and any applicable requirements that HUD, the Attorney General, or the U.S. Citizenship and Immigration Services may establish from time to time to comply with PRWORA, [Executive Order 14218](#), or other Executive Orders or immigration laws.
7. No state or unit of general local government that receives funding under this grant may use that funding in a manner that by design or effect facilitates the subsidization or promotion of illegal immigration or shields illegal aliens from deportation, including by maintaining policies or practices that materially impede enforcement of federal immigration statutes and regulations.
8. The Recipient must use SAVE, or an equivalent verification system approved by the Federal government, to prevent any Federal public benefit from being provided to an ineligible alien who entered the United States illegally or is otherwise unlawfully present in the United States.
9. Faith-based organizations may be subrecipients for funds on the same basis as any other organization. Recipients may not, in the selection of subrecipients, discriminate against an organization based on the organization’s religious character, affiliation, or exercise.