



LIFT

Community Action Agency, Inc.

Board of Directors Meeting

NOVEMBER 14, 2023 • 10:00 AM
HEAD START ADMINISTRATION OFFICE
1005 S. 5TH STREET - HUGO, OKLAHOMA

Our Mission:

To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.

Board of Directors and/or Executive Committee Meeting
LIFT Community Action Agency, Inc.
Tuesday, November 14, 2023 · 10:00 a.m.
Head Start Administration Office · 1005 S. 5th Street · Hugo, Oklahoma · 74743

AGENDA

- A.** Call to Order and Invocation
- B.** Opening of Board Meeting – Roll Call, Declaration of Quorum, and Introduction of Guests
- C.** Board Training: How to Interpret an Audit Report and Presentation of the 2022 LIFT CAA Audit (*Organizational Standards 5.7, 5.9 & 8.3*)
- D.** Consideration, Discussion, and Vote to Approve the 2022 LIFT CAA Audit (O.S. 8.1, 8.2 & 8.4)
- E.** Finance/Audit/Loan Committee Report

Consent Docket - The following items of business indicated by brackets (F and G, H, I) may be voted upon by a single vote of the Board without discussion, unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.

- F.** Consideration, Discussion and Vote to Approve October 2023 Regular Meeting Minutes (OS 5.5)
- G.** Consideration, Discussion, and Vote to Approve September 2023 Financial Reports; Distribution of October 2023 Financials for December 2023 Consideration and Vote (O.S. 8.7)
- H.** Consider Submission of Resolutions/Grant Applications, Vote to Approve – **\$2,173,906**
 - 1. PY 2023 Department of Energy Weatherization Assistance Program Grant Application to Oklahoma Department of Commerce/Community Development - **\$273,906**
 - 2. HOME Investment Partnerships Program Grant Applications to Oklahoma Housing Finance Agency - **\$800,000** (*Rental New Construction: \$750,000 & Community Housing Development Organization Operating: \$50,000*)
 - 3. FY 2024 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Application to Health Resources and Services Administration - **\$1,100,000**
- I.** Consider Acceptance of Grants/Contracts/Awards, Vote to Approve – **\$2,029,404.74**
 - 1. Child Care Stabilization Grant Program Award (Year 3/Quarter 1, Early Learning Centers) from Choctaw Nation of Oklahoma - **\$11,000**
 - 2. Child and Adult Care Food Program Award (Head Start/Early Head Start) from Oklahoma Department of Education - **\$625,500**
 - 3. CACFP Award (ELC) from Oklahoma Department of Education - **\$142,300**
 - 4. CACFP Award from Oklahoma Department of Education - **\$1,248,004.74** (*Program Operations – \$168,004.74; Daycare Home Meal Reimbursement – Up to \$1,080,000*)
 - 5. Mentoring+ Project Subgrant Award (2019 Extension Increase) from Youth Collaboratory - **\$2,600** (*Total Awarded: \$51,600*)
- J.** Consideration, Discussion, and Vote to Approve Filing of LIFT CAA 2022 Form 990 and Oklahoma Tax Return (O.S. 8.6)

- K.** Consideration, Discussion, and Vote to Approve LIFT CAA Organizational Conflict of Interest Policy and Procedures (*O.S. 7.1*)
- L.** Consideration, Discussion, and Vote to Approve Submission of Teacher Qualifications Waiver Request for Jonna Reynolds to Office of Head Start
- M.** Consideration, Discussion, and Vote to Approve Submission of FY 2024 Change in Scope – Enrollment Reduction Amendment Application for LIFT Head Start Program
- N.** Consideration, Discussion, and Vote to Approve 2024 Agency-Wide Budget (*O.S. 8.9*)
- O.** Consideration, Discussion, and Vote to Approve LIFT CAA to Act as Fiscal Agent for the Choctaw County Freestanding Multidisciplinary Team and Contract with Oklahoma Commission on Children and Youth (\$35,916.71 *Maximum Contract Total, Period: 1/1/2024–12/31/2024*)
- P.** Consideration, Discussion, and Vote to Approve LIFT CAA to Act as Fiscal Agent for the Pushmataha County Freestanding Multidisciplinary Team and Contract with Oklahoma Comm. on Children and Youth (\$35,916.71 *Maximum Contract Total, Period: 1/1/2024–12/31/2024*)
- Q.** Board Training/Programmatic Report: Update on ROMA Process, 2023 Community Action Plan with Logic Models/Results & 2023-25 Strategic Plan: Agency Program/Performance Evaluation, Success of Specific Strategies, Progress on Meeting Goals (*O.S. 4.2, 4.3, 4.4, 5.7, 5.9 & 6.5*)
- R.** Board Training/Programmatic Report: Quarterly (July-September) and Year-to-Date Housing Production as Reported to NeighborWorks® America (*O.S. 5.7 & 5.9*)
- S.** Board Training/Programmatic Report: HS/EHS/EHS-Child Care Program Information Reports (*O.S. 5.7 & 5.9*)
- T.** Board Giving Report (*O.S. 5.7*)
- U.** Policy Council Report (*O.S. 2.1 & 5.9*)
- V.** Recognition of November 2023 Employee of the Month:
Kristy Priddy, Center Director – Early Head Start Program
- W.** Recognition of Service Awards
Five Years: Gabrielle Brown, Caregiver – Early Head Start Program
Thirty Years: Johnna Yow, Program Director – Child and Adult Care Food Program
- X.** Other Reports/Announcements/Correspondence: HS/EHS/EHS-CC Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); NeighborWorks® America Board Resources Letter; YouthBuild Graduation Invitation (*O.S. 5.9*)
- Y.** Consideration, Discussion, and Vote on New Business (*Not known about or which could not have been reasonably foreseen prior to time of posting the Agenda, Oklahoma Statute Title 25 § 311*)
- Z.** Consideration, Discussion, and Vote to Adjourn

Posted: _____ Date: _____ Time: _____

LIFT COMMUNITY ACTION AGENCY, INC.
209 NORTH 4TH STREET
HUGO, OKLAHOMA 74743

MINUTES
BOARD OF DIRECTORS MEETING
October 10, 2023
Head Start Administration Office - Hugo, Oklahoma

The Board of Directors of LIFT Community Action Agency, Inc. met in a regular meeting session on Tuesday, October 10, 2023 at 10:10 a.m. The meeting was held at LIFT CAA's Head Start Administration Office, located at 1005 S. 5th Street in Hugo, Oklahoma. The notice of time, place, and an agenda for the meeting were posted 24 hours prior within prominent view at the main office (209 N. 4th St., Hugo, Oklahoma) and the meeting site (1005 S. 5th St., Hugo, Oklahoma) as well as online at <https://liftca.org/board/>.

The meeting was called to order by Chairman David Hawkins.

The Invocation was given by Board Member Danny Cornish.

Roll Call was taken and a quorum was established (18 Board Members present, 9 absent). The following Board Members were present at the meeting site: Tami Barnes, Tiffany Brockway, Danny Cornish, Kevin Cory, Brent Franks, David Hawkins, Andrea Henkel, Jia Johnson, Sharon Johnson, Vickie Leathers, Kara Maness, Sandra Meeks, Carolyn Pool, Wade Scott, David Smith, Consuelo Splawn, Vicky Wade, and Debra Williams. The following members were absent: Brad Burgett, Tina Foshee-Thomas, Patsy Guess, Jordan Hill, Trina Low, Leah Savage, William Smith, Jim Bob Sullivan, and Craig Young. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Rhonda Teague, Michelle Pulliam, Ernest McCarty, Macy Self, Johnny Moffitt, Darla Galyon, Jordan Mack, Mattie McKee, Stella Dennis, Amy Craven, Kelly Thomas, Rebecca (Reynolds) Porter, Brandon McDaniel, Kathy James, W.F. Grammar, and Kayla Lemons.

In order to be in compliance with the Open Meeting Act (Title 25, Oklahoma Statutes §§ 301-314), the vote of each member was publicly cast and recorded. The agenda contained Consent Docket items of business and the rules that pertain to voting on the items.

The Board recognized Carolyn Pool as the elected representative for the Antlers Community Food Bank, a Low-Income Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2024).

Board Member David Smith was appointed to serve as Board Mentor for new Board Member Carolyn Pool (Organizational Standard 5.7).

Rebecca (Reynolds) Porter, Executive Director, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on October 10, 2023 at 9:05 a.m. The Committee received a status report on all active loans; there were no new loan applications to present. The Committee voted to recommend full Board approval of the agency's Financial

Reports for August 2023. The Committee was presented with the September 2023 Financial Reports and Meeting Minutes. The Committee also received an update on properties.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the September 2023 Regular Meeting Minutes and the August 2023 Financial Reports; the September 2023 Financials were distributed for consideration and vote at the November 2023 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Brent Franks and seconded by Vicky Wade to approve the September 2023 Regular Meeting Minutes and the August 2023 Financial Reports. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Items F & G).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

1. Child Care Stabilization Grant Program Applications (Year 3, Early Learning Centers) to Choctaw Nation of Oklahoma, Child Care Assistance Program in the amount of \$128,000; if awarded, these funds will provide key operating support to maintain child care services within the Early Learning Centers.
2. 2023 Grant Application to Potts Family Foundation, Inc. in the amount of \$10,000; if awarded, these funds will be used for operational support of the agency's Head Start, Early Head Start, EHS-Child Care, and Help Me Grow programming, which promote resilience and help mitigate adverse childhood experiences prevalent among the children served.
3. FY 2024 Retired and Senior Volunteer Program Grant Application (Continuation, Year 3) to AmeriCorps in the amount of \$64,299; if awarded, funding will be used to support program operations within the third year of the three-year grant cycle.
4. National Initiatives Travel Application (Rural Advisory Council Convening) to NeighborWorks® America in the amount of \$2,000; if awarded, these funds will be used to support travel costs to attend the Rural Advisory Council meeting held during the National Rural Housing Conference in Washington, D.C.

After discussion and Board Member input with regards to the applications presented, a motion was made by David Smith and seconded by Andrea Henkel to approve the submission of resolutions and/or grant applications in the amount of \$204,299 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

1. 2023 Victims of Crime Act Grant Award (Court Appointed Special Advocates) from Oklahoma District Attorneys Council in the amount of \$44,383; these VOCA grant funds will be used to provide salary and other operating support for LIFT CASA staff during the project year. Since the purpose of this grant program is to provide direct services to victims of crime, this funding will allow LIFT CASA to continue providing advocacy services for abused and neglected children within Choctaw, McCurtain, and Pushmataha Counties.
2. 2023 VOCA Grant Award (Victim Advocacy Services) from Oklahoma DAC in the amount of \$75,000; this funding will provide operational support for the Victim Advocacy

Services Program for a period of one year. The program provides enhanced, needed direct services to victims and their families; a Victim Services Coordinator assists victims of crime in Choctaw, McCurtain and Pushmataha Counties through direct service provision/linking to resources that will serve the victim's physical, emotional, and basic needs.

3. FY 2023 Opioid Affected Youth Initiative Grant Award from U.S. Department of Justice, Office of Juvenile Justice and Delinquency Prevention in the amount of \$750,000; under this award, LIFT CAA will implement the Better Choices : Better Futures Program to develop coordinated intervention and prevention responses that identify and address challenges related to opioid and substance misuse impacting youth, families and communities within Choctaw, McCurtain, and Pushmataha Counties. The target population for the project will be children, youth, and their families residing in the service area who have been impacted by the opioid crisis and/or drug addiction. The project will also focus on promoting equity and removal of barriers to access/opportunity for communities that have historically been underserved, marginalized, and adversely affected by inequality, to include racial and ethnic minorities, as well as socioeconomically disadvantaged populations. It is expected that at least 50 youth/family members will be served each year through project intervention activities (a total of 150 over the three-year period of performance), with at least 1,500 individuals reached each year through prevention activities.
4. FY 2024 Base Grant Award from Oklahoma CASA Association in the amount of \$23,830; the one-year grant award will be used to provide staff salary support as well as associated operating expenses for the CASA Program.
5. SFY 2024 Community Action Agencies State Appropriated Funds for Head Start Award from Oklahoma Department of Commerce in the amount of \$83,602; these funds will be used to offset Head Start/Early Head Start Teacher salaries and fringe benefits, and support a portion of the salaries/fringe benefits for Family Advocates who work with the programs.
6. FY 2023 Community Services Block Grant Award (3rd Allocation) from ODOC in the amount of \$2,286; these funds will be used for the purpose of revitalizing communities and the creation of opportunities for economic prosperity among low-income individuals and families. The total amount awarded for FY 2023 is \$236,730.
7. National Initiatives Travel Award from NeighborWorks® America in the amount of \$2,000; these funds will be used to support travel costs to attend the Rural Advisory Council meeting held during the National Rural Housing Conference in Washington, D.C.
8. Child Care Stabilization Grant Program Awards (Year 3/Quarter 1, ELC) from Choctaw Nation of Oklahoma in the amount of \$21,000; these funds will provide key operating support to maintain child care services within the Early Learning Centers.
9. Food and Nutrition for Better Health Leadership Training Institute Award (Quarter 1) from National Healthy Start Association in the amount of \$2,500; this funding will be used to conduct planning and implementation work to bring nutritious food options to communities and families served by LIFT Healthy Start, in addition to the provision of education over nutrition and healthy foods.

A motion was made by Jia Johnson and seconded by Tami Barnes to approve acceptance of grants, contracts, and awards in the amount of \$1,004,601 as presented and listed on the Consent

Docket. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to enter into Executive Session to review and discuss the following items in accordance with Oklahoma Statute Title 25 § 307(B)(1): 1.) Executive and Personnel Committee's Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director (Organizational Standard 7.4) and 2.) Employment Contract Renewal and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA (Organizational Standard 7.5). A motion was made by Kara Maness and seconded by Tami Barnes to enter into Executive Session to review and discuss the Executive and Personnel Committee's Performance Evaluation, Employment Contract Renewal, and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item J). LIFT CAA staff/visitors then exited the room; the Board of Directors entered into Executive Session at 10:30 a.m.

After holding Executive Session, LIFT CAA staff/visitors were brought back into the meeting room. David Hawkins, Chairman, then requested the Board's consideration, discussion, and vote to adjourn out of Executive Session and the regular Board Meeting be reconvened. A motion was made by Andrea Henkel and seconded by David Smith to adjourn out of Executive Session and the regular Board Meeting be reconvened. The Roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item K). The Board of Directors adjourned out of Executive Session at 10:42 a.m.

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. In accordance with Organizational Standards – Category 7, Standard 7.4, the Governing Board conducts a performance appraisal of the Executive Director each calendar year. The Executive and Personnel Committee conduct the Performance Evaluation with the Executive Director present, then reports back to the Board on its findings. The Board reviews the Performance Evaluation, meets with the Executive Director if deemed necessary, and votes whether to approve the Evaluation. During Executive Session, the Board reviewed and discussed Executive Director Rebecca (Reynolds) Porter's Performance Evaluation. A motion was made by Kevin Cory and seconded by Vicky Wade to approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item L).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the Renewal of Contract, Employment, and Compensation of Rebecca (Reynolds) Porter as LIFT CAA Executive Director. In accordance with Organizational Standards – Category 7, Standard 7.5, the Governing Board reviews and approves the Executive Director's compensation each calendar year. During Executive Session, the Board reviewed Reynolds' compensation, which is tied to the renewal of the contract and employment approval, and which was also discussed. A motion was made by Kevin Cory and seconded by Jia Johnson to approve the Renewal of Contract and Employment of Rebecca (Reynolds) Porter as LIFT CAA Executive Director, along with approval of her Compensation as discussed by the Board in Executive

Session. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item M).

Johnny Moffitt, Associate Director, requested the Board's consideration, discussion, and vote to approve the LIFT Transit Title VI Program Plan (Organizational Standard 5.9). A Title VI Plan is the standard operating procedure for how Title VI of the 1964 Civil Rights Act is implemented and overseen by the LIFT Transit Program. The plan details the who, what, how, when, and why for each of the program's activities in relation to Title VI. Moffitt reviewed the Title VI Program Plan with the Board and facilitated discussion. A motion was made by Brent Franks and seconded by Wade Scott to approve the LIFT Transit Title VI Program Plan. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item N).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration, discussion, and vote to approve the LIFT CAA Board of Directors Regular Meeting Dates for 2024 (Organizational Standard 5.5). All Regular Meetings of the Board of Directors will be held at 10:00 a.m. on the second Tuesday of each month at LIFT CAA's Head Start Administration Office, located at 1005 S. 5th Street in Hugo, Oklahoma. A motion was made by Kara Maness and seconded by Tami Barnes to approve the LIFT CAA Board of Directors Regular Meeting Dates for 2024. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item O).

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, requested the Board's consideration, discussion, and vote to approve hiring of Kellogg & Sovereign[®] Consulting, LLC as the E-Rate Consultants for the 2024-2025 E-Rate Funding Year. As the E-Rate Consultants, Kellogg & Sovereign[®] Consulting, LLC will file forms, assess needs, prepare and post requests, and other lengthy duties. E-Rate is not a grant; it is a service that provides discounts up to 90% on phone, fax, and internet services for schools and libraries, funded by fees paid by telecommunications companies. A motion was made by Brent Franks and seconded by Debra Williams to approve hiring of Kellogg & Sovereign[®] Consulting, LLC as the E-Rate Consultants for the 2024-2025 E-Rate Funding Year. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item P).

Jordan Mack, Head Start/Early Head Start/EHS-Child Care Assistant Director, requested the Board's consideration, discussion, and vote to approve the Head Start/Early Head Start/Early Head Start-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy. The Policy Council Operating Procedures and Conflict Resolution/Impasse Policy reflect Federal requirements contained in the Head Start Program Performance Standards. These documents are reviewed (with changes made as needed) and approved by the Board of Directors and Policy Council annually. No changes are being proposed. A motion was made by David Smith and seconded by Tami Barnes to approve the Head Start/Early Head Start/Early Head Start-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy. The roll call vote was: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item Q).

Rebecca (Reynolds) Porter, Executive Director, provided an update on the Board Self-Assessment (Organizational Standard 5.7). The agency is required to conduct the Board Member

Self-Assessment every two years. Board Members essentially “rate” themselves in a series of questions related to the Board and its functioning. The Self-Assessment has been distributed to the Board (via email) for completion; the deadline has been extended until the end of the month for completion. The findings of the Self-Assessment will then be reported to the Board. Based on the responses, the Board Training Committee will develop a plan to raise capacity in areas identified as needs by Board Members.

Kathy James, Senior Program Planner, provided a Board Training (Organizational Standard 5.7) over Board Recruitment and Retention as well as Low-Income Participation (in Board activities and Members), with regards to Organizational Standard 1.1.

David Hawkins, Chairman, appointed Board Member Sharon Johnson to the Transportation Advisory Council. There was a vacancy on the Council stemming from the resignation of Cathie Carothers from the Board of Directors. Therefore, it was necessary to appoint a new member to the Council to fill the open seat. The Transportation Advisory Council regularly convenes each quarter, with a primary purpose to inform agency leadership of the transportation needs of older Americans within their communities, and serves an essential function in helping to identify and address transportation barriers, challenges, and resources.

Kinsey Cox, CSBG Administrator/Public Relations Specialist, presented the 2023 Customer Satisfaction Report for the 3rd Quarter (July – September) in accordance with CSBG Organizational Standard 1.3. The Customer Satisfaction Surveys are designed to allow customers an outlet for providing feedback. The Customer Satisfaction Surveys are completed by clients either online or in paper format after having inquired about or received a service through an agency-operated program. LIFT CAA analyzes these survey responses as an additional tool to determine overall effectiveness of programs. During the 3rd Quarter, a total of 31 surveys were collected. Of those, 42% were from Pushmataha County, 26% from Choctaw County, and 16% from McCurtain County, with the remaining 16% from all other service counties. The programs represented during the 3rd Quarter included Apartments, Emergency Assistance, and Housing. Of those responding, 100% selected ‘Satisfied’ with regards to satisfaction level for agency services received.

W.F. Grammar, Risk Manager, provided the Board with the Risk Assessment and Management Report (Organizational Standard 5.9). The report focused on Workers’ Compensation, safety, and risk management activities/programming within the agency during the last quarter.

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided the Board with the Policy Council Report for the September 19, 2023 meeting (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized Kayla Lemons (Cook, Head Start Program) as the October 2023 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized the following Service Award recipients: Five Years – Allen Carroll (Construction Superintendent, Administration), Jonie Smith

(Center Director, Early Head Start Program); and Ten Years – Amy Craven (Assistant Director/Center Director/Lead Teacher, Early Learning Centers).

Other Reports/Announcements/Correspondence were presented as follows: HS/EHS/EHS-CC Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Safe Place Healing Hearts Program No-Cost Extension Approval; Head Start Teacher Qualifications Waiver Approval; and Domestic Violence Awareness Month Information (Organizational Standard 5.9).

There being no other business to come before the Board, a motion was made by Kevin Cory and seconded by Tami Barnes to adjourn the regular meeting. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. Voting record is attached (Item BB).

The Regular Meeting adjourned at 11:26 a.m.

Brad Burgett, Secretary/Treasurer

CALL
TO
ORDER!
10:10
am

October 10, 2023		Present	Absent	B. FRANKS V. WADE F & G			D. SMITH A. HENKEL H			J. JOHNSON T. BARNES I			K. MANESS T. BARNES J			A. HENKEL D. SMITH K		
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓			✓			✓			✓		
2	Tiffany Brockway	✓		✓			✓			✓			✓			✓		
3	Brad Burgett		✓															
4	Danny Cornish	✓		✓			✓			✓			✓			✓		
5	Kevin Cory	✓		✓			✓			✓			✓			✓		
6	Tina Foshee-Thomas		✓															
7	Brent Franks	✓		✓			✓			✓			✓			✓		
8	Patsy Guess		✓															
9	Andrea Henkel	✓		✓			✓			✓			✓			✓		
10	Jordan Hill		✓															
11	Jia Johnson	✓		✓			✓			✓			✓			✓		
12	Sharon Johnson	✓		✓			✓			✓			✓			✓		
13	Vickie Leathers	✓		✓			✓			✓			✓			✓		
14	Trina Low		✓															
15	Kara Maness	✓		✓			✓			✓			✓			✓		
16	Sandra Meeks	✓		✓			✓			✓			✓			✓		
17	Carolyn Pool	✓		✓			✓			✓			✓			✓		
18	Leah Savage		✓															
19	Wade Scott	✓		✓			✓			✓			✓			✓		
20	David Smith	✓		✓			✓			✓			✓			✓		
21	William Smith		✓															
22	Consuelo Splawn	✓		✓			✓			✓			✓			✓		
23	Jim Bob Sullivan		✓															
24	Vicky Wade	✓		✓			✓			✓			✓			✓		
25	Debra Williams	✓		✓			✓			✓			✓			✓		
26	Craig Young		✓															
27	David Hawkins	✓																

①

10:30
am

10:42
am

October 10, 2023		Present	Absent	✓			M			N			O			P		
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓			✓			✓			✓		
2	Tiffany Brockway	✓		✓			✓			✓			✓			✓		
3	Brad Burgett		✓															
4	Danny Cornish	✓		✓			✓			✓			✓			✓		
5	Kevin Cory	✓		✓			✓			✓			✓			✓		
6	Tina Foshee-Thomas		✓															
7	Brent Franks	✓		✓			✓			✓			✓			✓		
8	Patsy Guess		✓															
9	Andrea Henkel	✓		✓			✓			✓			✓			✓		
10	Jordan Hill		✓															
11	Jia Johnson	✓		✓			✓			✓			✓			✓		
12	Sharon Johnson	✓		✓			✓			✓			✓			✓		
13	Vickie Leathers	✓		✓			✓			✓			✓			✓		
14	Trina Low		✓															
15	Kara Maness	✓		✓			✓			✓			✓			✓		
16	Sandra Meeks	✓		✓			✓			✓			✓			✓		
17	Carolyn Pool	✓		✓			✓			✓			✓			✓		
18	Leah Savage		✓															
19	Wade Scott	✓		✓			✓			✓			✓			✓		
20	David Smith	✓		✓			✓			✓			✓			✓		
21	William Smith		✓															
22	Consuelo Splawn	✓		✓			✓			✓			✓			✓		
23	Jim Bob Sullivan		✓															
24	Vicky Wade	✓		✓			✓			✓			✓			✓		
25	Debra Williams	✓		✓			✓			✓			✓			✓		
26	Craig Young		✓															
27	David Hawkins	✓																

②

October 10, 2023		Present	Absent	Q			BB											
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓											
2	Tiffany Brockway	✓		✓			✓											
3	Brad Burgett		✓															
4	Danny Cornish	✓		✓			✓											
5	Kevin Cory	✓		✓			✓											
6	Tina Foshee-Thomas		✓															
7	Brent Franks	✓		✓			✓											
8	Patsy Guess		✓															
9	Andrea Henkel	✓		✓			✓											
10	Jordan Hill		✓															
11	Jia Johnson	✓		✓			✓											
12	Sharon Johnson	✓		✓			✓											
13	Vickie Leathers	✓		✓			✓											
14	Trina Low		✓															
15	Kara Maness	✓		✓			✓											
16	Sandra Meeks	✓		✓			✓											
17	Carolyn Pool	✓		✓			✓											
18	Leah Savage		✓															
19	Wade Scott	✓		✓			✓											
20	David Smith	✓		✓			✓											
21	William Smith		✓															
22	Consuelo Splawn	✓		✓			✓											
23	Jim Bob Sullivan		✓															
24	Vicky Wade	✓		✓			✓											
25	Debra Williams	✓		✓			✓											
26	Craig Young		✓															
27	David Hawkins	✓																

P. SMITH

T. BARNES

K. CORY

T. BARNES

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LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Balance Sheet
End of Oct 2023

FINANCIAL ROW	AMOUNT (AS OF OCT 2023)	COMPARISON AMOUNT (AS OF ADJUST 2022)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	\$8,044,597.80	\$8,413,383.22	(\$368,785.42)	-4.38%
1020 - Payroll Account	\$943,844.25	\$1,753.85	\$942,090.40	53,715.56%
1021 - First United Accounts Payable	\$661,033.01	\$6,250.82	\$654,782.19	10,475.14%
1022 - First United TH Reserve	\$138,123.58	\$131,955.09	\$6,168.49	4.67%
1023 - First United General Escrow	\$107,198.96	\$113,538.59	(\$6,339.63)	-5.58%
1024 - First United Marina License	\$240.76	\$240.46	\$0.30	0.12%
1025 - First United Deposit (PayPal)	\$2,646.31	\$2,016.44	\$629.87	31.24%
1026 - First United SBA Revolving Loan	\$0.00	\$33,016.10	(\$33,016.10)	-100.00%
1027 - First United SBA Loan Loss Reserve	\$0.00	\$15,152.32	(\$15,152.32)	-100.00%
1028 - First United Unrestricted Funds CD	\$815,029.94	\$815,029.94	\$0.00	0.00%
1030 - Shamrock Bank - Clayton	\$1,832.55	\$1,823.39	\$9.16	0.50%
1040 - Petty Cash	\$410.00	\$410.00	\$0.00	0.00%
1050 - McCurtain County National Bank	\$8,277.27	\$26,015.47	(\$17,738.20)	-68.18%
Total - 1000 - Cash	\$10,723,234.43	\$9,560,585.69	\$1,162,648.74	12.16%
Total Bank	\$10,723,234.43	\$9,560,585.69	\$1,162,648.74	12.16%
Accounts Receivable				
1100 - Receivables	\$1,973,429.64	\$72,102.84	\$1,901,326.80	2,636.97%
1300 - Other receivables				
1320 - Notes/loans receivable	\$352,041.49	\$425,808.08	(\$73,766.59)	-17.32%
1321 - Loans Receivable from Belmont	\$162,809.48	\$138,180.48	\$24,629.00	17.82%
1322 - Loans Receivable from Clayton	\$207,282.53	\$192,896.53	\$14,386.00	7.46%
1323 - Loans Receivable rom Kiamichi	\$123,563.90	\$108,305.90	\$15,258.00	14.09%
1324 - Loans Receivable from SOCDC	\$422,001.57	\$422,001.57	\$0.00	0.00%
1325 - Reserve for Loan Loss	\$909.36	\$909.36	\$0.00	0.00%
1326 - Loans Receivable from Rouleau House	\$55,857.61	\$58,109.09	(\$2,251.48)	-3.87%
Total - 1300 - Other receivables	\$1,324,465.94	\$1,346,211.01	(\$21,745.07)	-1.62%
Total Accounts Receivable	\$3,297,895.58	\$1,418,313.85	\$1,879,581.73	132.52%
Other Current Asset				
1400 - Other assets	\$25,084.16	\$24,618.06	\$466.10	1.89%
1500 - Investments	\$503,298.01	\$507,453.03	(\$4,155.02)	-0.82%
NS097 - Interfund Due to /Due from	\$138,590.50	(\$109,231.26)	\$247,821.76	-226.88%
Payroll Float	\$317,459.47	\$0.00	\$317,459.47	0.00%
Total Other Current Asset	\$984,432.14	\$422,839.83	\$561,592.31	132.81%
Total Current Assets	\$15,005,562.15	\$11,401,739.37	\$3,603,822.78	31.61%
Fixed Assets				
1600 - Fixed operating assets				
1610 - Land	\$345,647.21	\$345,647.21	\$0.00	0.00%
1620 - Buildings	\$6,463,324.18	\$6,463,324.18	\$0.00	0.00%

FINANCIAL ROW	AMOUNT (AS OF OCT 2023)	COMPARISON AMOUNT (AS OF ADJUST 2022)	VARIANCE	% VARIANCE
1630 - Leasehold Improvements	\$2,123,010.79	\$2,123,010.79	\$0.00	0.00%
1640 - Computers & Equipment over \$5,000	\$910,706.64	\$910,706.64	\$0.00	0.00%
1650 - Vehicles	\$4,000,373.21	\$4,000,373.21	\$0.00	0.00%
Total - 1600 - Fixed operating assets	\$13,843,062.03	\$13,843,062.03	\$0.00	0.00%
1700 - Accum deprec - fixed operating assets	(\$7,647,526.96)	(\$7,647,526.96)	\$0.00	0.00%
Total Fixed Assets	\$6,195,535.07	\$6,195,535.07	\$0.00	0.00%
Total ASSETS	\$21,201,097.22	\$17,597,274.44	\$3,603,822.78	20.48%
Liabilities & Equity				
Current Liabilities				
Accounts Payable	\$21,435.39	\$101,418.92	(\$79,983.53)	-78.86%
Other Current Liability				
2100 - Accrued liabilities				
2120 - Accrued Employee Benefits	(\$3,184.25)	\$387,903.92	(\$391,088.17)	-100.82%
2130 - Accrued payroll taxes	(\$80,772.27)	\$0.00	(\$80,772.27)	0.00%
2150 - Home Loan Escrow Accounts	\$1,703.31	\$1,359.70	\$343.61	25.27%
2160 - Due to (Liab)	\$1,327,762.07	\$0.00	\$1,327,762.07	0.00%
2180 - Accrued Payroll Deductions	(\$11,238.88)	\$0.00	(\$11,238.88)	0.00%
Total - 2100 - Accrued liabilities	\$1,234,269.98	\$389,263.62	\$845,006.36	217.08%
2400 - Refundable Advances	\$23,887.34	\$3,956.00	\$19,931.34	503.83%
Total Other Current Liability	\$1,258,157.32	\$393,219.62	\$864,937.70	219.96%
Total Current Liabilities	\$1,279,592.71	\$494,638.54	\$784,954.17	158.69%
Long Term Liabilities				
2700 - Long-term notes & loans payable				
2770 - Long-term liabilities - Mower Loan	\$4,689.09	\$9,545.47	(\$4,856.38)	-50.88%
Total - 2700 - Long-term notes & loans payable	\$4,689.09	\$9,545.47	(\$4,856.38)	-50.88%
Total Long Term Liabilities	\$4,689.09	\$9,545.47	(\$4,856.38)	-50.88%
Equity	\$19,916,815.42	\$17,093,090.43	\$2,823,724.99	16.52%
Total Liabilities & Equity	\$21,201,097.22	\$17,597,274.44	\$3,603,822.78	20.48%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Income Statement
From Jan 2023 to Oct 2023

FINANCIAL ROW	AMOUNT (JAN 2023 - OCT 2023)	COMPARATIVE AMOUNT (JAN 2022 - ADJUST 2022)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$29,966.81	\$69,049.56	(\$39,082.75)	-56.60%
4100 - Inkind Revenue	\$915,008.03	\$1,291,033.69	(\$376,025.66)	-29.13%
4200 - Miscellaneous Revenue	\$3,756,005.47	\$2,004,891.58	\$1,751,113.89	87.34%
4400 - State Revenue	\$786,145.87	\$4,794,084.40	(\$4,007,938.53)	-83.60%
4500 - Federal Revenue	\$13,235,393.79	\$23,261,693.66	(\$10,026,299.87)	-43.10%
4900 - Recoveries from Programs	\$3,028,257.51	\$3,119,843.96	(\$91,586.45)	-2.94%
5000 - Rental Revenue	\$538,187.92	\$636,571.50	(\$98,383.58)	-15.46%
5100 - Program Fee Revenue	\$1,469,601.77	\$2,082,811.45	(\$613,209.68)	-29.44%
5300 - Interest and Dividends	\$97,346.89	\$1,010,047.11	(\$912,700.22)	-90.36%
5400 - Revenue from other sources	\$1,223,896.95	\$1,156,674.32	\$67,222.63	5.81%
5800 - Special Event Expense	\$6,440.33	\$0.00	\$6,440.33	0.00%
Total - Income	\$25,086,251.34	\$39,426,701.23	(\$14,340,449.89)	-36.37%
Cost Of Sales				
8000 - Cost of Goods Sold	\$169.31	\$2,060.72	(\$1,891.41)	-91.78%
Total - Cost Of Sales	\$169.31	\$2,060.72	(\$1,891.41)	-91.78%
Gross Profit	\$25,086,082.03	\$39,424,640.51	(\$14,338,558.48)	-36.37%
Expense				
7000 - Grants, contracts, & direct assistance	\$1,398,953.24	\$2,008,078.68	(\$609,125.44)	-30.33%
7200 - Salaries & related expenses	\$9,137,321.60	\$18,189,681.74	(\$9,052,360.14)	-49.77%
7300 - Indirect Cost Pool Expense	\$1,496,597.32	\$2,796,846.95	(\$1,300,249.63)	-46.49%
7500 - Contract/Consultant Services	\$1,287,568.65	\$1,155,284.95	\$132,283.70	11.45%
8100 - Non personnel expenses	\$924,469.04	\$2,869,349.37	(\$1,944,880.33)	-67.78%
8200 - Facility & equipment expenses	\$1,841,998.58	\$2,409,161.02	(\$567,162.44)	-23.54%
8300 - Travel & meetings expenses	\$523,832.49	\$1,284,462.42	(\$760,629.93)	-59.22%
8400 - Insurance Expense	\$1,775,957.43	\$2,018,236.29	(\$242,278.86)	-12.00%
8600 - Business expenses	\$8,063.62	\$650.00	\$7,413.62	1,140.56%
8700 - Food Expenses	\$1,338,311.09	\$1,676,290.87	(\$337,979.78)	-20.16%
8800 - In-Kind Expenses	\$915,358.03	\$1,198,713.48	(\$283,355.45)	-23.64%
Total - Expense	\$20,648,431.09	\$35,606,755.77	(\$14,958,324.68)	-42.01%
Net Ordinary Income	\$4,437,650.94	\$3,817,884.74	\$619,766.20	16.23%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,343,338.52	\$1,877,451.95	(\$534,113.43)	-28.45%
Total - Other Expense	\$1,343,338.52	\$1,877,451.95	(\$534,113.43)	-28.45%
Net Other Income	(\$1,343,338.52)	(\$1,877,451.95)	\$534,113.43	-28.45%
Net Income	\$3,094,312.42	\$1,940,432.79	\$1,153,879.63	59.47%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Financial Position
End of Oct 2023

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	\$8,044,597.80
1020 - Payroll Account	\$943,844.25
1021 - First United Accounts Payable	\$661,033.01
1022 - First United TH Reserve	\$138,123.58
1023 - First United General Escrow	\$107,198.96
1024 - First United Marina License	\$240.76
1025 - First United Deposit (PayPal)	\$2,646.31
1028 - First United Unrestricted Funds CD	\$815,029.94
1030 - Shamrock Bank - Clayton	\$1,832.55
1040 - Petty Cash	\$410.00
1050 - McCurtain County National Bank	\$8,277.27
Total - 1000 - Cash	\$10,723,234.43
Total Bank	\$10,723,234.43
Accounts Receivable	
1100 - Receivables	\$1,973,429.64
1300 - Other receivables	
1320 - Notes/loans receivable	\$352,041.49
1321 - Loans Receivable from Belmont	\$162,809.48
1322 - Loans Receivable from Clayton	\$207,282.53
1323 - Loans Receivable rom Kiamichi	\$123,563.90
1324 - Loans Receivable from SOCDC	\$422,001.57
1325 - Reserve for Loan Loss	\$909.36
1326 - Loans Receivable from Rouleau House	\$55,857.61
Total - 1300 - Other receivables	\$1,324,465.94
Total Accounts Receivable	\$3,297,895.58
Other Current Asset	
1400 - Other assets	\$25,084.16
1500 - Investments	\$503,298.01
NS097 - Interfund Due to /Due from	\$138,590.50
Payroll Float	\$317,459.47
Total Other Current Asset	\$984,432.14
Total Current Assets	\$15,005,562.15
Fixed Assets	
1600 - Fixed operating assets	
1610 - Land	\$345,647.21
1620 - Buildings	\$6,463,324.18
1630 - Leasehold Improvements	\$2,123,010.79
1640 - Computers & Equipment over \$5,000	\$910,706.64
1650 - Vehicles	\$4,000,373.21
Total - 1600 - Fixed operating assets	\$13,843,062.03
1700 - Accum deprec - fixed operating assets	(\$7,647,526.96)
Total Fixed Assets	\$6,195,535.07
Total ASSETS	\$21,201,097.22
Liabilities & Equity	
Current Liabilities	
Accounts Payable	\$21,435.39
Other Current Liability	

FINANCIAL ROW**AMOUNT****2100 - Accrued liabilities****\$1,234,269.98****2400 - Refundable Advances****\$23,887.34****Total Other Current Liability****\$1,258,157.32****Total Current Liabilities****\$1,279,592.71****Long Term Liabilities****2700 - Long-term notes & loans payable****\$4,689.09****2770 - Long-term liabilities - Mower Loan****\$4,689.09****Total - 2700 - Long-term notes & loans payable****\$4,689.09****Total Long Term Liabilities****\$4,689.09****Equity****\$19,916,815.42****Total Liabilities & Equity****\$21,201,097.22**

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Cash Flow
From Jan 2023 to Oct 2023

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	\$3,094,312.42
Adjustments to Net Income	
Accounts Receivable	(\$1,879,581.73)
Other Current Asset	(\$565,747.33)
Accounts Payable	(\$79,983.53)
Sales Tax Payable	\$18,421.34
Other Current Liabilities	\$846,516.36
Total Adjustments to Net Income	(\$1,660,374.89)
Total Operating Activities	\$1,433,937.53
Financing Activities	
Long Term Liabilities	(\$4,856.38)
Other Equity	(\$30,352.36)
Total Financing Activities	(\$35,208.74)
Net Change in Cash for Period	\$1,398,728.79
Cash at Beginning of Period	\$9,547,317.40
Effect of Exchange Rate on Cash	(\$240,235.07)
Cash at End of Period	\$10,705,811.12

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Revenue Summary
Oct 2023

REVENUE STREAM	AMOUNT (THIS MONTH) (JAN 2022 - ADJUST 2022)	AMOUNT (LAST MONTH) (JAN 2022 - ADJUST 2022)	AMOUNT (THIS FY) (JAN 2022 - ADJUST 2022)	AMOUNT (LAST FY) (JAN 2022 - ADJUST 2022)
- Unassigned -	\$37,408,221.83	\$37,408,221.83	\$37,408,221.83	\$37,408,221.83
Program Revenue	\$1,881,671.62	\$1,881,671.62	\$1,881,671.62	\$1,881,671.62
Federal Grants	\$947,754.89	\$947,754.89	\$947,754.89	\$947,754.89
Federal Contract	\$411,145.13	\$411,145.13	\$411,145.13	\$411,145.13
Federal Pass Through	\$12,009.44	\$12,009.44	\$12,009.44	\$12,009.44
State Pass Through	\$154,643.81	\$154,643.81	\$154,643.81	\$154,643.81
Recoveries	(\$67,351.22)	(\$67,351.22)	(\$67,351.22)	(\$67,351.22)
State Grants	\$17,484.10	\$17,484.10	\$17,484.10	\$17,484.10
State Contracts	\$6,362.17	\$6,362.17	\$6,362.17	\$6,362.17
Management Fees	\$25,684.36	\$25,684.36	\$25,684.36	\$25,684.36
Transit Contract				
Transit Fares				
Miscellaneous	\$770.00	\$770.00	\$770.00	\$770.00
Other Contract Revenue	\$815.64	\$815.64	\$815.64	\$815.64
Corporate/Business/Foundation				
Non Federal	(\$1,372,510.54)	(\$1,372,510.54)	(\$1,372,510.54)	(\$1,372,510.54)
Total	\$39,426,701.23	\$39,426,701.23	\$39,426,701.23	\$39,426,701.23

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Expense Summary
Oct 2023

PROGRAM	AMOUNT (THIS MONTH) (OCT 2023)	AMOUNT (LAST MONTH) (JAN 2022 - ADJUST 2022)	AMOUNT (THIS YEAR) (JAN 2022 - ADJUST 2022)	AMOUNT (LAST YEAR) (JAN 2022 - ADJUST 2022)
- Unassigned -				
- Unassigned -	\$522,879.41	(\$1,720,054.74)	(\$1,720,054.74)	(\$1,720,054.74)
RX		\$15,645.78	\$15,645.78	\$15,645.78
CASA	\$2,391.29	\$20,730.63	\$20,730.63	\$20,730.63
RSVP	\$73.48	\$174,860.32	\$174,860.32	\$174,860.32
T&MA	\$472,287.04	\$5,867,523.94	\$5,867,523.94	\$5,867,523.94
VOCA	\$848.59	\$128,440.82	\$128,440.82	\$128,440.82
Housing	\$26,959.34	\$2,138,780.65	\$2,138,780.65	\$2,138,780.65
Transit	\$29,937.21	\$3,288,671.72	\$3,288,671.72	\$3,288,671.72
Mentoring	\$55.08	\$175,636.71	\$175,636.71	\$175,636.71
Tri-CORPS	\$1,955.37	\$501,566.03	\$501,566.03	\$501,566.03
AmeriCorps		\$93,287.90	\$93,287.90	\$93,287.90
Apartments	\$37,961.75	\$559,081.68	\$559,081.68	\$559,081.68
Head Start	(\$10,060.86)	\$7,978,959.91	\$7,978,959.91	\$7,978,959.91
Youth Build	\$14,178.88	\$1,097,318.49	\$1,097,318.49	\$1,097,318.49
Healthy Start	\$31,224.25	\$1,871,794.29	\$1,871,794.29	\$1,871,794.29
Second Chance	\$1,596.55	\$126,127.08	\$126,127.08	\$126,127.08
Administration	\$224,988.10	\$3,378,468.31	\$3,378,468.31	\$3,378,468.31
Early Head Start	(\$101,220.13)	\$1,005,769.79	\$1,005,769.79	\$1,005,769.79
Self-Help Housing	\$5,750.94	\$2,283,888.04	\$2,283,888.04	\$2,283,888.04
Community Services	\$3,624.58	\$227,868.06	\$227,868.06	\$227,868.06
Emergency Services	\$422.29	\$350,162.48	\$350,162.48	\$350,162.48
CACFP - Daycare Homes	\$71,678.65	\$1,331,863.24	\$1,331,863.24	\$1,331,863.24
Drug Free Communities	\$2,800.02	\$85,306.00	\$85,306.00	\$85,306.00
State Park Operations	\$44,438.48	\$915,372.77	\$915,372.77	\$915,372.77
Early Learning Centers	\$17,867.51	\$900,050.86	\$900,050.86	\$900,050.86
Safe Place Healing Hearts	(\$1,043.29)	\$917,178.31	\$917,178.31	\$917,178.31
Early Head Start Child Care	\$165,577.17	\$146,530.65	\$146,530.65	\$146,530.65
Economic Development (Lending)	\$222,738.49	\$1,222,398.09	\$1,222,398.09	\$1,222,398.09
Total - Unassigned -	\$1,789,910.19	\$35,083,227.81	\$35,083,227.81	\$35,083,227.81
Fundraising	\$8.82			
Program Services	\$40,198.09			
Management & General (Admin)	\$383,582.85	\$990,555.12	\$990,555.12	\$990,555.12
Total	\$2,213,699.95	\$36,073,782.93	\$36,073,782.93	\$36,073,782.93

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2023 to Dec 2023
Options: Activity Only

Agency Wide Budget

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$25,000.00	\$29,966.81	(\$4,966.81)	119.87%
4100 - Inkind Revenue	\$952,223.51	\$915,008.03	\$37,215.48	96.09%
4200 - Miscellaneous Revenue	\$28,311.00	\$3,756,005.47	(\$3,727,694.47)	13,266.95%
4400 - State Revenue	\$2,289,909.74	\$786,145.87	\$1,503,763.87	34.33%
4500 - Federal Revenue	\$27,537,535.01	\$13,235,393.79	\$14,302,141.22	48.06%
4900 - Recoveries from Programs	\$1,677,332.00	\$3,028,257.51	(\$1,350,925.51)	180.54%
5000 - Rental Revenue	\$0.00	\$557,844.42	(\$557,844.42)	0.00%
5100 - Program Fee Revenue	\$450,250.00	\$1,489,965.61	(\$1,039,715.61)	330.92%
5300 - Interest and Dividends	\$500.04	\$97,667.48	(\$97,167.44)	19,531.93%
5400 - Revenue from other sources	\$105,397.92	\$1,223,936.95	(\$1,118,539.03)	1,161.25%
5800 - Special Event Expense	\$0.00	\$6,440.33	(\$6,440.33)	0.00%
Total - Income	\$33,066,459.22	\$25,126,632.27	\$7,939,826.95	75.99%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$169.31	(\$169.31)	0.00%
Total - Cost Of Sales	\$0.00	\$169.31	(\$169.31)	0.00%
Gross Profit	\$33,066,459.22	\$25,126,462.96	\$7,939,996.26	75.99%
Expense				
7000 - Grants, contracts, & direct assistance	\$178,085.00	\$1,398,953.24	(\$1,220,868.24)	785.55%
7200 - Salaries & related expenses	\$16,901,230.59	\$9,600,265.61	\$7,300,964.98	56.80%
7300 - Indirect Cost Pool Expense	\$2,814,793.23	\$1,578,789.91	\$1,236,003.32	56.09%
7500 - Contract/Consultant Services	\$2,527,125.96	\$1,287,819.65	\$1,239,306.31	50.96%
8100 - Non personnel expenses	\$2,430,699.15	\$928,311.56	\$1,502,387.59	38.19%
8200 - Facility & equipment expenses	\$3,062,986.70	\$1,847,908.33	\$1,215,078.37	60.33%
8300 - Travel & meetings expenses	\$1,865,004.06	\$528,864.82	\$1,336,139.24	28.36%
8400 - Insurance Expense	\$253,676.84	\$1,778,130.43	(\$1,524,453.59)	700.94%
8600 - Business expenses	\$0.00	\$8,063.62	(\$8,063.62)	0.00%
8700 - Food Expenses	\$94,970.00	\$1,338,427.23	(\$1,243,457.23)	1,409.32%
8800 - In-Kind Expenses	\$788,545.94	\$915,358.03	(\$126,812.09)	116.08%
Total - Expense	\$30,917,117.47	\$21,210,892.43	\$9,706,225.04	68.61%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$2,437,086.16	\$1,348,375.42	\$1,088,710.74	55.33%
Total - Other Expense	\$2,437,086.16	\$1,348,375.42	\$1,088,710.74	55.33%
Net Income	(\$287,744.41)	\$2,567,195.11	(\$2,854,939.52)	-892.18%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2023 to Dec 2023

Financial Row	- No Department -		10 Operating		
			Administration	Building Funds	Total
	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense					
Income					
4000 - Contribution Revenue	\$1,079.00	\$0.00	\$14,558.09	\$0.00	\$14,558.09
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4200 - Miscellaneous Revenue	\$1,135,099.50	\$0.00	\$2,515.57	\$25.00	\$2,540.57
4400 - State Revenue	\$921.25	\$0.00	\$18,106.53	\$0.00	\$18,106.53
4500 - Federal Revenue	\$89,983.26	\$0.00	\$95,601.78	\$0.00	\$95,601.78
4900 - Recoveries from Programs	\$59,359.81	\$358.17	\$2,968,539.53	\$0.00	\$2,968,897.70
5000 - Rental Revenue	\$12,729.00	\$0.00	\$0.00	\$194,756.00	\$194,756.00
5100 - Program Fee Revenue	\$40,332.09	\$0.00	(\$150.00)	(\$150.00)	(\$300.00)
5300 - Interest and Dividends	\$989.59	\$0.00	\$26,426.31	\$1,381.05	\$27,807.36
5400 - Revenue from other sources	\$62,791.09	\$0.00	\$941,405.39	\$0.00	\$941,405.39
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$1,403,284.59	\$358.17	\$4,067,003.20	\$196,012.05	\$4,263,373.42
8000 - Cost of Goods Sold					
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expense					
7000 - Grants, contracts, & direct assistance	\$4,590.57	\$0.00	\$335,934.39	\$0.00	\$335,934.39
7200 - Salaries & related expenses	(\$2,691,741.67)	\$383,047.66	\$1,092,662.33	\$0.00	\$1,475,709.99
7300 - Indirect Cost Pool Expense	(\$444,337.80)	\$4,147.00	\$4,135.37	\$0.00	\$8,282.37
7500 - Contract/Consultant Services	\$73,556.50	\$34,800.00	\$146,039.03	\$76,161.23	\$257,000.26
8100 - Non personnel expenses					
8110 - Office/Teaching Supplies	\$20,306.02	\$0.00	\$24,345.63	\$3,511.44	\$27,857.07
8120 - Other/Maint Supplies	\$771.68	\$69.30	\$29,425.47	\$12,937.56	\$42,432.33
8130 - Telephone & Internet	\$12,417.64	\$61.28	\$10,973.26	\$1,009.23	\$12,043.77
8140 - Postage & shipping	\$0.00	\$0.00	\$5,019.59	\$0.00	\$5,019.59
8150 - Medical/Dental Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8160 - Events/Meeting Expense	\$30.78	\$0.00	\$4,164.23	\$0.00	\$4,164.23
8170 - Printing & copying	\$4,721.15	(\$1,744.07)	\$4,542.12	\$2,028.98	\$4,827.03
8180 - Fatherhood	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8190 - WX Materials	\$206.91	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8100 - Non personnel expenses	\$38,454.18	(\$1,613.49)	\$78,470.30	\$19,487.21	\$96,344.02
8200 - Facility & equipment expenses					
8210 - Space Lease	\$675.71	\$3,966.00	\$35,085.00	\$0.00	\$39,051.00
8215 - Equipment Lease	\$959.64	\$0.00	\$3,000.50	\$0.00	\$3,000.50
8220 - Electric	\$0.00	\$378.77	(\$1,683.72)	\$61,367.31	\$60,062.36
8225 - Water	\$0.00	\$85.02	\$0.00	\$4,256.65	\$4,341.67
8230 - Trash	\$6,365.07	\$0.00	\$0.00	\$5,787.36	\$5,787.36
8235 - Sewer	\$0.00	\$46.50	\$0.00	\$2,456.70	\$2,503.20
8240 - Natural Gas	\$0.00	\$0.00	\$0.00	\$10,043.62	\$10,043.62
8250 - Equip & Over \$5000.00 (Inv Items)	\$241,867.99	\$0.00	\$0.00	\$10,000.00	\$10,000.00
8255 - WX Tools & Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8260 - Repair/Maint for Building/Equip	\$22,299.71	\$0.00	\$4,230.54	\$46,959.22	\$51,189.76
8265 - Construction Rehab & Renovation	\$3,199.28	\$0.00	\$0.00	\$10,536.25	\$10,536.25
8270 - Deprec & amort - allowable	\$0.00	\$0.00	(\$9,000.00)	\$10,000.00	\$1,000.00
8290 - Construction Leverage	\$21,631.83	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8200 - Facility & equipment expenses	\$296,999.23	\$4,476.29	\$31,632.32	\$161,407.11	\$197,515.72
8300 - Travel & meetings expenses	\$14,584.90	\$303.91	\$59,766.64	\$1,725.29	\$61,795.84
8400 - Insurance Expense	\$13,403.24	\$954.00	\$1,219,464.56	\$49,023.87	\$1,269,442.43
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$64,533.98	\$106.26	\$8,267.12	\$5.81	\$8,379.19
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	(\$2,629,956.87)	\$426,221.63	\$2,976,372.06	\$307,810.52	\$3,710,404.21
Net Ordinary Income	\$4,033,241.46	(\$425,863.46)	\$1,090,631.14	(\$111,798.47)	\$552,969.21
Other Income and Expenses					
Other Expense	\$119,525.31	\$11,411.48	\$169,920.39	\$1,092.76	\$182,424.63

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2023 to Dec 2023

Financial Row	CACFP - Daycare Homes	Early Head Start - CC	Early Learning Centers		HS/EHS EHS	Head Start	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense							
Income							
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4100 - Inkind Revenue	\$0.00	\$2,486.92	\$0.00	\$0.00	\$97,308.20	\$575,924.24	\$673,232.44
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$440,190.01	\$1,736,527.78	\$0.00	\$34,340.80	\$1,770,868.58
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$63,303.10	\$115,097.05	\$61,004.61	\$239,404.76
4500 - Federal Revenue	\$903,034.77	\$1,624,693.00	\$50,287.56	\$224,983.15	\$817,565.00	\$3,220,200.00	\$4,262,748.15
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$0.00	\$0.00	\$596,909.50	\$0.00	\$0.00	\$0.00	\$0.00
5300 - Interest and Dividends	\$0.00	\$0.00	\$9,512.31	\$16,623.57	\$0.00	\$0.00	\$16,623.57
5400 - Revenue from other sources	\$1,437.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$904,472.16	\$1,627,179.92	\$1,096,899.38	\$2,041,437.60	\$1,029,970.25	\$3,891,469.65	\$6,962,877.50
8000 - Cost of Goods Sold							
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expense							
7000 - Grants, contracts, & direct assistance	\$1,437.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$83,191.40	\$453,481.51	\$716,756.03	\$454,334.23	\$617,266.18	\$2,020,897.43	\$3,092,497.84
7300 - Indirect Cost Pool Expense	\$16,436.00	\$89,490.70	\$118,447.44	\$73,736.27	\$120,042.57	\$380,212.33	\$573,991.17
7500 - Contract/Consultant Services	\$4,714.97	\$576,545.33	\$2,439.71	\$19,062.82	\$7,513.96	\$38,711.79	\$65,288.57
8100 - Non personnel expenses							
8110 - Office/Teaching Supplies	\$1,319.13	\$76,337.52	\$48,990.76	\$79,447.13	\$26,517.40	\$88,545.91	\$194,510.44
8120 - Other/Maint Supplies	\$0.00	\$4,375.26	\$99.97	\$20,825.81	\$2,077.62	\$12,227.82	\$35,131.25
8130 - Telephone & Internet	\$204.54	\$3,635.97	\$9,142.38	\$13,316.14	\$4,843.06	\$37,569.13	\$55,728.33
8140 - Postage & shipping	\$988.53	\$334.24	\$4.53	\$30.86	\$147.66	\$587.61	\$766.13
8150 - Medical/Dental Supplies	\$0.00	\$12,942.35	\$0.00	\$52.86	\$4,939.46	\$13,551.50	\$18,543.82
8160 - Events/Meeting Expense	\$0.00	\$974.50	\$3,200.53	\$477.38	\$430.22	\$1,705.77	\$2,613.37
8170 - Printing & copying	\$395.55	\$7,338.73	\$871.90	\$0.00	\$3,735.40	\$14,753.93	\$18,489.33
8180 - Fatherhood	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8190 - WX Materials	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8100 - Non personnel expenses	\$2,907.75	\$105,938.57	\$62,310.07	\$114,160.18	\$42,690.82	\$168,941.67	\$325,782.67
8200 - Facility & equipment expenses							
8210 - Space Lease	\$3,740.00	\$404.01	\$1,100.00	\$235.00	\$161.74	\$2,698.54	\$3,095.28
8215 - Equipment Lease	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8220 - Electric	\$0.00	\$8,260.70	\$10,299.44	\$1,773.36	\$3,409.16	\$38,111.78	\$43,294.30
8225 - Water	\$0.00	\$234.02	\$596.88	\$12.87	\$136.42	\$4,489.81	\$4,639.10
8230 - Trash	\$0.00	\$804.41	\$1,379.35	\$857.11	\$840.71	\$7,759.63	\$9,457.45
8235 - Sewer	\$0.00	\$112.75	\$713.57	\$15.91	\$193.11	\$3,290.56	\$3,499.58
8240 - Natural Gas	\$0.00	\$684.76	\$985.40	\$420.87	\$718.43	\$2,699.04	\$3,838.34
8250 - Equip & Over \$5000.00 (Inv Items)	\$0.00	\$0.00	\$0.00	\$41,554.00	\$0.00	\$0.00	\$41,554.00
8255 - WX Tools & Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8260 - Repair/Maint for Building/Equip	\$0.00	\$8,668.84	\$10,087.11	\$22,233.59	\$18,124.93	\$78,765.68	\$119,124.20
8265 - Construction Rehab & Renovation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8270 - Deprec & amort - allowable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8290 - Construction Leverage	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8200 - Facility & equipment expenses	\$3,740.00	\$19,169.49	\$25,161.75	\$67,102.71	\$23,584.50	\$137,815.04	\$228,502.25
8300 - Travel & meetings expenses	\$17,311.58	\$14,080.95	\$7,002.71	\$4,979.74	\$5,444.04	\$34,376.57	\$44,800.35
8400 - Insurance Expense	\$0.00	\$10,539.66	\$16,653.62	\$0.00	\$14,777.84	\$60,020.52	\$74,798.36
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$569,031.11	\$49.95	\$141,539.37	\$180,996.36	\$17,113.77	\$181,519.46	\$379,629.59
8800 - In-Kind Expenses	\$0.00	\$2,486.92	\$0.00	\$0.00	\$97,308.20	\$576,274.24	\$673,582.44
Total - Expense	\$698,770.20	\$1,271,783.08	\$1,090,310.70	\$914,362.31	\$945,741.88	\$3,598,769.05	\$5,458,873.24
Net Ordinary Income	\$205,701.96	\$355,396.84	\$6,588.68	\$1,127,075.29	\$84,228.37	\$292,700.60	\$1,504,004.26
Other Income and Expenses							
Other Expense	\$542.57	\$246,773.18	\$7,790.46	\$55,625.92	\$32,115.19	\$129,037.72	\$216,778.83

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2023 to Dec 2023

Financial Row	CASA	Community Services	Drug Free Communities	Emergency Services	EFSP	Total	Healthy Start	Mentoring	RCOR TRI-CORP	RSVP	RX	Safe Place Healing Hearts	Second Chance	VOCA	Youth Build	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense																
Income																
4000 - Contribution Revenue	\$85.00	\$0.00	\$0.00	\$50.00	\$0.00	\$50.00	\$0.00	\$50.00	\$0.00	\$12,855.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,125.00	\$14,165.00
4100 - In-kind Revenue	\$0.00	\$0.00	\$7,115.37	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$24,340.24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$31,455.61
4200 - Miscellaneous Revenue	\$7,670.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,000.00	\$7,500.00	\$5,000.00	\$15,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$42,170.00
4400 - State Revenue	\$4,626.10	\$1,152.59	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,540.95	\$0.00	\$0.00	\$93,750.00	\$0.00	\$129,038.57
4500 - Federal Revenue	\$0.00	\$10,000.00	\$66,487.00	\$7,400.00	\$8,904.00	\$16,304.00	\$1,038,715.00	\$49,000.00	\$251,477.00	\$51,510.00	\$0.00	\$235,584.78	\$173,435.42	\$201,603.46	\$320,827.00	\$2,475,062.66
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5300 - Interest and Dividends	\$175.01	\$12.29	\$86.75	\$31.30	\$2.57	\$33.87	\$12.38	\$134.72	\$15.75	\$19.90	\$0.00	\$0.00	\$12.37	\$464.63	\$18.44	\$1,026.29
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,430.33	\$0.00	\$0.00	\$0.00	\$0.00	\$2,010.00	\$6,440.33
Total - Income	\$12,556.11	\$11,164.88	\$73,689.12	\$7,481.30	\$8,906.57	\$16,387.87	\$1,040,727.38	\$56,684.72	\$256,492.75	\$108,155.47	\$6,540.95	\$235,584.78	\$178,447.79	\$295,818.09	\$323,980.44	\$2,616,230.35
Expense																
8000 - Cost of Goods Sold																
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7000 - Grants, contracts, & direct assistance	\$224.27	\$2,356.12	\$0.00	\$10,018.46	\$3,393.72	\$13,412.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$72,272.21	\$0.00	\$1,207.13	\$93.00	\$94,395.57
7200 - Salaries & related expenses	\$0.00	\$982.81	\$41,988.39	\$0.00	\$0.00	\$0.00	\$560,968.89	\$24,975.58	\$170,846.60	\$46,201.55	\$3,193.72	\$121,359.19	\$96,943.29	\$97,527.60	\$162,492.41	\$1,816,467.11
7300 - Indirect Cost Pool Expense	\$0.00	\$209.77	\$7,910.71	\$0.00	\$0.00	\$0.00	\$109,239.07	\$5,765.25	\$34,328.04	\$9,978.90	\$644.84	\$24,931.03	\$19,667.78	\$17,022.97	\$32,700.59	\$349,872.45
7500 - Contract/Consultant Services	\$308.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$56,954.00	\$119.46	\$32.98	\$0.00	\$0.00	\$9,298.61	\$9,850.00	\$0.00	(\$22,750.00)	\$91,736.52
8100 - Non personnel expenses																
8110 - Office/Teaching Supplies	\$164.91	\$0.00	\$3,657.57	\$0.00	\$0.00	\$0.00	\$23,270.37	\$403.94	\$1,353.13	\$119.70	\$422.76	(\$8,434.22)	\$4,237.48	\$0.00	\$4,280.71	\$29,476.35
8120 - Other/Maint Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$392.34	\$26.14	\$0.00	\$0.00	\$0.00	(\$35,691.22)	\$0.00	\$0.00	\$404.82	(\$34,867.92)
8130 - Telephone & Internet	\$600.71	\$0.00	\$175.24	\$0.00	\$0.00	\$0.00	\$6,380.62	\$254.60	\$195.20	\$1,603.24	\$0.00	(\$7,079.23)	\$217.62	\$182.18	\$0.00	\$2,530.18
8140 - Postage & shipping	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,008.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$63.00	\$1,071.00
8150 - Medical/Dental Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,972.00	\$0.00	\$13,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$22,472.00
8160 - Events/Meeting Expense	\$1,692.14	\$0.00	\$154.29	\$0.00	\$0.00	\$0.00	\$3,015.41	\$7,372.37	\$1,631.96	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$472.62	\$14,338.79
8170 - Printing & copying	\$0.00	\$0.00	\$0.12	\$0.00	\$0.00	\$0.00	\$11,239.33	\$0.00	\$0.00	\$26.32	\$0.00	\$88.20	\$3,972.91	\$0.00	\$594.70	\$15,921.58
8180 - Fatherhood	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00
8190 - WX Materials	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8100 - Non personnel expenses	\$2,457.76	\$0.00	\$3,987.22	\$0.00	\$0.00	\$0.00	\$54,778.07	\$8,057.05	\$16,680.29	\$1,749.26	\$422.76	(\$51,116.47)	\$8,428.01	\$182.18	\$5,815.85	\$51,441.98
8200 - Facility & equipment expenses																
8210 - Space Lease	\$2,080.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23,111.00	\$614.00	\$6,650.00	\$2,360.00	\$0.00	\$5,294.07	\$3,700.00	\$1,971.93	\$10,000.00	\$55,781.00
8215 - Equipment Lease	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8220 - Electric	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$2,448.86)	(\$2,448.86)
8225 - Water	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$223.37)	(\$223.37)
8230 - Trash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$469.37)	(\$469.37)
8235 - Sewer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$88.55)	(\$88.55)
8240 - Natural Gas	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8250 - Equip & Over \$5000.00 (Inv Items)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$2,961.81)	\$0.00	\$0.00	\$0.00	(\$2,961.81)
8255 - WX Tools & Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8260 - Repair/Maint for Building/Equip	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$225.00	\$0.00	\$0.00	\$0.00	\$0.00	\$144.05	\$369.05
8265 - Construction Rehab & Renovation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8270 - Deprec & amort - allowable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8290 - Construction Leverage	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8200 - Facility & equipment expenses	\$2,080.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23,111.00	\$614.00	\$6,650.00	\$2,585.00	\$0.00	\$2,332.26	\$3,700.00	\$1,971.93	\$6,913.90	\$49,958.09
8300 - Travel & meetings expenses	\$668.06	\$0.00	\$15,812.72	\$0.00	\$0.00	\$0.00	\$44,858.90	\$1,302.87	\$7,809.97	\$2,338.31	\$238.45	\$7,549.88	\$17,934.24	\$4,708.92	\$13,983.33	\$126,106.26
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$132.00	\$0.00	\$0.00	\$1,878.20	\$0.00	\$0.00	\$0.00	\$0.00	\$4,229.00	\$6,239.20
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$0.00	\$0.00	\$382.76	\$0.00	\$0.00	\$0.00	\$207.26	\$0.00	\$0.00	\$5,855.47	\$0.00	\$0.00	\$0.00	\$0.00	\$87.65	\$6,533.14
8800 - In-Kind Expenses	\$0.00	\$0.00	\$7,115.37	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$24,340.24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$31,455.61
Total - Expense	\$5,738.09	\$3,548.70	\$77,197.17	\$10,018.46	\$3,393.72	\$13,412.18	\$850,249.19	\$40,834.21	\$236,347.88	\$94,926.93	\$4,499.77	\$186,626.71	\$156,523.32	\$122,620.73	\$203,565.73	\$1,996,090.61
Net Ordinary Income	\$6,818.02	\$7,616.18	(\$3,508.05)	(\$2,537.16)	\$5,512.85	\$2,975.69	\$190,478.19	\$15,850.51	\$20,144.87	\$13,228.54	\$2,041.18	\$48,958.07	\$21,924.47	\$173,197.36	\$120,414.71	\$620,139.74
Other Income and Expenses																
Other Expense	\$606.35	\$930.00	\$512.27	\$0.00	\$0.00	\$0.00	\$139,970.15	\$1,436.56	\$16,627.77	\$5,634.22	\$0.00	\$4,875.72	\$2,385.75	\$0.00	\$98,148.44	\$286,000.89

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2023 to Dec 2023

Financial Row	HOUSING						
	Apartments	Construction	HUD Apartments (Lift)	Housing	Self Help Housing	TMA	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense							
Income							
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$121.72	\$0.00	\$0.00	\$121.72
4100 - Inkind Revenue	\$26,373.28	\$162,643.23	\$0.00	\$0.00	\$0.00	\$0.00	\$189,016.51
4200 - Miscellaneous Revenue	\$162.00	\$0.00	\$0.00	\$174,699.68	\$0.00	\$0.00	\$188,087.14
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$8,544.10	\$0.00	\$0.00	\$16,059.10
4500 - Federal Revenue	\$165,492.66	\$448,592.44	\$0.00	\$494,230.94	\$544,706.00	\$1,122,811.85	\$2,814,650.25
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$334,812.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$350,359.42
5100 - Program Fee Revenue	\$5,759.82	(\$514.87)	\$20,194.68	\$111,287.68	\$0.00	\$0.00	\$142,996.15
5300 - Interest and Dividends	(\$112,072.39)	(\$48.00)	\$0.00	\$11,158.33	\$0.00	\$938.83	\$15,756.77
5400 - Revenue from other sources	\$10,650.00	\$0.00	\$0.00	\$198,143.30	\$0.00	\$0.00	\$208,793.30
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$431,177.79	\$610,672.80	\$20,194.68	\$998,185.75	\$544,706.00	\$1,123,750.68	\$3,728,687.70
8000 - Cost of Goods Sold							
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expense							
7000 - Grants, contracts, & direct assistance	(\$119,669.00)	\$0.00	\$0.00	\$81,321.03	\$0.00	\$644,551.53	\$734,155.56
7200 - Salaries & related expenses	\$38,545.76	\$295,540.28	\$5,319.93	\$283,233.07	\$378,195.02	\$481,681.22	\$1,835,467.63
7300 - Indirect Cost Pool Expense	\$7,981.62	\$56,270.21	\$5,139.19	\$40,720.59	\$75,243.03	\$95,961.86	\$345,195.36
7500 - Contract/Consultant Services	\$33,490.80	\$14,616.50	\$0.00	\$27,422.98	\$31.95	\$219.87	\$80,302.18
8100 - Non personnel expenses							
8110 - Office/Teaching Supplies	\$1,523.42	\$116.68	\$0.00	\$13,496.62	\$2,342.84	\$11,937.61	\$29,417.17
8120 - Other/Maint Supplies	\$1,586.73	\$4,512.46	\$0.00	\$532.02	\$81.94	\$893.28	\$7,606.43
8130 - Telephone & Internet	\$2,094.04	\$0.00	\$0.00	\$6,139.60	\$2,950.46	\$5,786.85	\$16,970.95
8140 - Postage & shipping	\$212.16	\$0.00	(\$29.79)	\$544.91	\$645.50	\$282.85	\$1,655.63
8150 - Medical/Dental Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8160 - Events/Meeting Expense	\$0.00	\$0.00	\$0.00	\$229.17	\$31.44	\$393.08	\$653.69
8170 - Printing & copying	\$0.00	\$0.00	\$0.00	\$703.17	\$0.00	\$205.12	\$908.29
8180 - Fatherhood	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8190 - WX Materials	\$0.00	\$22,897.71	\$0.00	\$8,611.06	\$0.00	\$0.00	\$31,508.77
Total - 8100 - Non personnel expenses	\$5,416.35	\$27,526.85	(\$29.79)	\$30,256.55	\$6,052.18	\$19,498.79	\$88,720.93
8200 - Facility & equipment expenses							
8210 - Space Lease	\$0.00	\$0.00	\$0.00	\$11,222.75	\$16,041.25	\$11,050.00	\$38,314.00
8215 - Equipment Lease	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8220 - Electric	\$1,545.62	\$0.00	\$0.00	\$233.13	\$144.03	\$0.00	\$1,922.78
8225 - Water	\$1,779.09	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,779.09
8230 - Trash	\$945.57	\$525.00	\$148.08	\$19.00	\$0.00	\$0.00	\$1,637.65
8235 - Sewer	\$918.55	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$918.55
8240 - Natural Gas	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8250 - Equip & Over \$5000.00 (Inv Items)	\$28,000.00	\$50,000.00	\$0.00	\$42,427.22	\$1,362.13	\$0.00	\$121,789.35
8255 - WX Tools & Equipment	\$0.00	\$324.89	\$0.00	\$23,091.64	\$0.00	\$0.00	\$23,416.53
8260 - Repair/Maint for Building/Equip	\$113,048.44	\$15,246.48	\$0.01	\$364.79	\$998.20	\$1,088.99	\$130,746.91
8265 - Construction Rehab & Renovation	\$19,788.48	\$33,333.75	\$0.00	\$1,194.79	\$0.00	\$180.04	\$54,497.06
8270 - Deprec & amort - allowable	\$303.23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$303.23
8290 - Construction Leverage	\$121,737.48	\$125,676.28	\$0.00	\$0.00	\$0.00	\$0.00	\$247,413.76
Total - 8200 - Facility & equipment expenses	\$288,066.46	\$225,106.40	\$148.09	\$78,553.32	\$18,545.61	\$12,319.03	\$622,738.91
8300 - Travel & meetings expenses	\$6,593.13	\$8,708.23	(\$382.30)	\$24,264.44	\$17,888.26	\$52,159.03	\$117,091.38
8400 - Insurance Expense	\$141,250.23	\$2,173.00	(\$252.82)	\$16,061.32	\$147.00	\$0.00	\$159,378.73
8600 - Business expenses	\$8,063.62	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,063.62
8700 - Food Expenses	\$0.00	\$0.00	\$0.00	\$543.02	\$0.00	\$0.00	\$543.02
8800 - In-Kind Expenses	\$26,373.28	\$162,643.23	\$0.00	\$0.00	\$0.00	\$0.00	\$189,016.51
Total - Expense	\$436,112.25	\$792,584.70	\$9,942.30	\$582,376.32	\$496,103.05	\$1,306,391.33	\$3,623,509.95
Net Ordinary Income	(\$4,934.46)	(\$181,911.90)	\$10,252.38	\$415,809.43	\$48,602.95	(\$182,640.65)	\$105,177.75
Other Income and Expenses							
Other Expense	\$11,928.19	\$35,571.92	\$168.00	\$91,595.63	\$3,928.09	\$17,127.55	\$204,811.05

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency
Income/Expense Statement Summary
From Jan 2023 to Dec 2023

Financial Row

Transit

Amount

Ordinary Income/Expense

Income

4000 - Contribution Revenue	\$0.00
4100 - Inkind Revenue	\$0.00
4200 - Miscellaneous Revenue	\$121,982.43
4400 - State Revenue	\$0.00
4500 - Federal Revenue	\$681,756.00
4900 - Recoveries from Programs	\$0.00
5000 - Rental Revenue	\$0.00
5100 - Program Fee Revenue	\$321,831.26
5300 - Interest and Dividends	\$1,361.00
5400 - Revenue from other sources	\$6,585.90
5800 - Special Event Expense	\$0.00

Total - Income **\$1,133,516.59**

8000 - Cost of Goods Sold

8020 - Ship Store (Resale Inv)	\$0.00
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Total - 8000 - Cost of Goods Sold **\$0.00**

Expense

7000 - Grants, contracts, & direct assistance	\$6,585.90
7200 - Salaries & related expenses	\$761,761.18
7300 - Indirect Cost Pool Expense	\$147,844.65
7500 - Contract/Consultant Services	\$21,963.98
8100 - Non personnel expenses	
8110 - Office/Teaching Supplies	\$7,561.58
8120 - Other/Maint Supplies	\$737.75
8130 - Telephone & Internet	\$25,820.20
8140 - Postage & shipping	\$98.37
8150 - Medical/Dental Supplies	\$0.00
8160 - Events/Meeting Expense	\$472.56
8170 - Printing & copying	\$185.16
8180 - Fatherhood	\$0.00
8190 - WX Materials	\$0.00

Total - 8100 - Non personnel expenses **\$34,875.62**

8200 - Facility & equipment expenses

8210 - Space Lease	\$10,900.00
8215 - Equipment Lease	\$0.00
8220 - Electric	\$8,360.35
8225 - Water	\$1,562.88
8230 - Trash	\$1,207.39
8235 - Sewer	\$869.00
8240 - Natural Gas	\$533.18
8250 - Equip & Over \$5000.00 (Inv Items)	\$68,361.00
8255 - WX Tools & Equipment	\$0.00
8260 - Repair/Maint for Building/Equip	\$7,366.78
8265 - Construction Rehab & Renovation	\$0.00
8270 - Deprec & amort - allowable	\$0.00
8290 - Construction Leverage	\$0.00

Total - 8200 - Facility & equipment expenses **\$99,160.58**

8300 - Travel & meetings expenses **\$107,007.34**

8400 - Insurance Expense **\$141,960.62**

8600 - Business expenses **\$0.00**

8700 - Food Expenses **\$0.00**

8800 - In-Kind Expenses **\$0.00**

Total - Expense **\$1,321,159.87**

Net Ordinary Income **(\$187,643.28)**

Other Income and Expenses

Other Expense **\$14,340.57**

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2023 to Dec 2023

Financial Row	Economic Development/Lending	Economic Development & Tourism			Total Amount
		Clayton Lake Amount	Hugo Lake Amount	Raymond Gary Amount	
Ordinary Income/Expense					
Income					
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$43.00	\$43.00
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4200 - Miscellaneous Revenue	\$0.00	\$120.00	\$2,083.50	\$0.00	\$2,203.50
4400 - State Revenue	\$0.00	\$42,772.50	\$0.00	\$50,771.66	\$93,544.16
4500 - Federal Revenue	\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$19,378.92	\$29,860.28	\$255,781.72	\$77,713.25	\$364,532.71
5300 - Interest and Dividends	\$19,827.44	\$0.00	\$3,482.44	\$549.93	\$4,032.37
5400 - Revenue from other sources	\$0.00	\$0.00	\$2,370.25	\$98.00	\$2,690.53
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$89,206.36	\$72,752.78	\$263,717.91	\$129,175.84	\$465,646.53
8000 - Cost of Goods Sold					
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$169.31	\$0.00	\$169.31
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$169.31	\$0.00	\$169.31
Expense					
7000 - Grants, contracts, & direct assistance	\$221,853.86	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$4,550.62	\$50,660.12	\$89,275.77	\$64,260.67	\$204,196.56
7300 - Indirect Cost Pool Expense	\$948.22	\$10,052.60	\$17,066.64	\$12,443.25	\$39,562.49
7500 - Contract/Consultant Services	\$0.00	\$0.00	\$53,891.10	\$6,220.00	\$60,111.10
8100 - Non personnel expenses					
8110 - Office/Teaching Supplies	\$0.00	(\$33.70)	\$505.56	\$111.66	\$583.52
8120 - Other/Maint Supplies	\$0.00	\$953.72	\$10,886.10	\$1,124.42	\$12,964.24
8130 - Telephone & Internet	\$0.00	\$397.79	\$4,615.18	\$2,014.24	\$7,027.21
8140 - Postage & shipping	\$0.00	\$0.00	\$399.49	\$50.80	\$450.29
8150 - Medical/Dental Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8160 - Events/Meeting Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8170 - Printing & copying	\$0.00	\$0.00	\$0.00	\$86.28	\$86.28
8180 - Fatherhood	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8190 - WX Materials	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8100 - Non personnel expenses	\$0.00	\$1,317.81	\$16,406.33	\$3,387.40	\$21,111.54
8200 - Facility & equipment expenses					
8210 - Space Lease	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8215 - Equipment Lease	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8220 - Electric	\$0.00	\$0.00	\$3,139.98	\$6,911.86	\$10,051.84
8225 - Water	\$0.00	\$136.36	\$0.00	\$854.60	\$990.96
8230 - Trash	\$0.00	\$1,149.00	\$366.80	\$548.08	\$2,063.88
8235 - Sewer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8240 - Natural Gas	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8250 - Equip & Over \$5000.00 (Inv Items)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8255 - WX Tools & Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8260 - Repair/Maint for Building/Equip	\$0.00	\$13,908.26	\$35,696.54	\$8,241.80	\$57,846.60
8265 - Construction Rehab & Renovation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8270 - Deprec & amort - allowable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8290 - Construction Leverage	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8200 - Facility & equipment expenses	\$0.00	\$15,193.62	\$39,203.32	\$16,556.34	\$70,953.28
8300 - Travel & meetings expenses	\$0.00	\$1,324.21	\$4,162.31	\$1,941.68	\$7,428.20
8400 - Insurance Expense	\$0.00	\$4,476.26	\$72,273.92	\$8,964.39	\$85,714.57
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$0.00	\$0.00	\$469.13	\$0.00	\$469.13
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$227,352.70	\$83,024.62	\$292,748.52	\$113,773.73	\$489,546.87
Net Ordinary Income	(\$138,146.34)	(\$10,271.84)	(\$29,199.92)	\$15,402.11	(\$24,069.65)
Other Income and Expenses					
Other Expense	\$0.00	\$3,857.35	\$41,972.92	\$8,801.86	\$54,632.13

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Credit Card Vendor Totals
Oct 2023
Options: Show Zeros

NAME	AMOUNT (GROSS)
CAPITAL ONE	\$22,692.57
DAVISON FUELS & OIL, LLC	\$9,664.56
HOME DEPOT BRC/GECF	\$3,087.03
TCM BANK NA	\$15,971.39
WAL-MART COMMUNITY BRC	\$4,329.27
Total	\$55,744.82

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Credit Card Report
Oct 2023

Program	Cost of Goods Sold		Facility & equipment expenses		Food Expenses		Grants, contracts, & direct assistance		Non personnel expenses										Other Expenses					Travel & meetings expenses			Total
	Ship Store (Resale Inv) Amount	Repair/Maint for Building/Equip Amount	Food Nutrition Cost Amount	Non-Food, Nutrition Cost Amount	Other Food Expense Amount	Total Amount	VICTIM ASSISTANCE Amount	Events/Meeting Expense Amount	Medical/Dental Supplies Amount	Office/Teaching Supplies Amount	Other/Maint Supplies Amount	Postage & shipping Amount	Printing & copying Amount	Telephone & Internet Amount	Advertising & Community Sponsorships Amount	Software Related Expenses Amount	Fees/Dues Amount	Incentive Expense Amount	Other Expenses Amount	Recognition Amount	Training & TTA Amount	Total Amount	Fuel Cost Amount	Out of Area Travel Amount	Total Amount		
Administration					\$67.71	\$67.71				\$379.33	\$57.11	\$42.64				\$479.08	\$7,461.85	\$54.24		\$1,578.45		\$9,630.28			\$0.00	\$10,177.07	
Apartments					\$0.00	\$0.00				\$152.43						\$152.43						\$54.24	\$172.26		\$172.26	\$226.50	
CASA					\$0.00	\$0.00				\$1,769.37						\$1,769.37						\$0.00			\$0.00	\$152.43	
Drug Free Communities					\$186.30	\$186.30				\$1,769.37						\$1,769.37	\$149.90		\$360.00			\$509.90	\$0.00	\$2,465.57		\$2,465.57	
Early Head Start					\$324.91	\$324.91				\$1,162.93						\$1,162.93						\$21.78	\$21.78	\$78.48	\$856.00	\$934.46	
Early Head Start Child Care					\$0.00	\$0.00				\$8.02						\$8.02						\$120.50	\$10.50	\$196.15		\$196.15	
Early Learning Centers			\$732.92	\$31.57	\$229.09	\$993.58				\$1,816.96						\$1,816.96			\$469.79	\$469.79		\$20.00	\$499.79		\$0.00	\$3,310.33	
Head Start			\$171.07	(\$36.47)	\$351.37	\$485.97		\$98.47	\$24.95	\$2,878.59					\$3,002.01	\$848.72	\$105.98	\$162.75	\$82.56	\$965.48		\$38.31	\$2,127.18	\$949.05	\$737.04	\$1,686.09	
Healthy Start					\$207.26	\$207.26				\$0.00						\$0.00						\$1,346.01	\$1,346.01			\$1,553.27	
Housing					\$0.00	\$0.00		\$24.17			\$32.98					\$57.15	\$291.78		\$252.79			\$60.00	\$604.57	\$907.76		\$907.76	
Self-Help Housing					\$0.00	\$0.00					\$192.79	\$778.25		\$608.87	\$1,579.91	\$67.57				\$7,194.83			\$2,002.40	\$516.83		\$516.83	
State Park Operations	\$169.31	\$4,854.74			\$469.13	\$469.13																\$7,202.40	\$516.83		\$516.83		
TDMA					\$0.00	\$0.00											\$95.94	\$95.94				\$191.88	\$0.00		\$191.88		
Transit					\$0.00	\$0.00																\$0.00	\$6,580.86		\$6,580.86		
VOCA					\$0.00	\$0.00	\$819.83															\$0.00			\$0.00	\$819.83	
Youth Build					\$31.41	\$31.41		\$149.10		\$37.19	\$23.39		\$166.37			\$375.05						\$8.49			\$316.63	\$78.48	
Total	\$169.31	\$4,854.74	\$903.99	(\$4.90)	\$1,867.18	\$2,766.27	\$819.83	\$271.74	\$24.95	\$8,204.82	\$206.27	\$820.89	\$166.37	\$608.87	\$10,403.91	\$1,208.07	\$7,813.67	\$1,175.70	\$380.00	\$7,277.39	\$3,022.21	\$1,388.98	\$22,246.02	\$9,804.67	\$1,582.04	\$11,387.71	

COGS = 169.31
Facilities = 4854.74
Food = 2766.27
Supplies = 10403.91
Other = 22246.02
Travel/fuel = 11397.71
Victim asst = 819.83
52657.79

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Dec 2023
Options: Activity Only

Head Start

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$0.00	\$554,637.97	(\$554,637.97)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$42,265.60	(\$42,265.60)	0.00%
4500 - Federal Revenue	\$3,510,751.00	\$3,376,276.00	\$134,475.00	96.17%
Total - Income	\$3,510,751.00	\$3,973,179.57	(\$462,428.57)	113.17%
Gross Profit	\$3,510,751.00	\$3,973,179.57	(\$462,428.57)	113.17%
Expense				
7200 - Salaries & related expenses	\$2,366,104.96	\$2,333,468.70	\$32,636.26	98.62%
7300 - Indirect Cost Pool Expense	\$486,606.00	\$435,620.06	\$50,985.94	89.52%
7500 - Contract/Consultant Services	\$46,700.00	\$48,410.58	(\$1,710.58)	103.66%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$13,250.00	\$106,713.10	(\$93,463.10)	805.38%
8120 - Other/Maint Supplies	\$0.00	\$12,227.82	(\$12,227.82)	0.00%
8130 - Telephone & Internet	\$17,500.00	\$46,552.35	(\$29,052.35)	266.01%
8140 - Postage & shipping	\$660.00	\$635.25	\$24.75	96.25%
8150 - Medical/Dental Supplies	\$0.00	\$13,604.36	(\$13,604.36)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$1,705.77	(\$1,705.77)	0.00%
8170 - Printing & copying	\$1,500.00	\$14,753.93	(\$13,253.93)	983.60%
8180 - Fatherhood	\$1,000.00	\$0.00	\$1,000.00	0.00%
Total - 8100 - Non personnel expenses	\$33,910.00	\$196,192.58	(\$162,282.58)	578.57%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$3,019.25	(\$3,019.25)	0.00%
8220 - Electric	\$5,500.00	\$46,003.28	(\$40,503.28)	836.42%
8225 - Water	\$4,500.00	\$5,193.30	(\$693.30)	115.41%
8230 - Trash	\$2,500.00	\$8,777.91	(\$6,277.91)	351.12%
8235 - Sewer	\$2,500.00	\$3,819.74	(\$1,319.74)	152.79%
8240 - Natural Gas	\$2,500.00	\$3,208.98	(\$708.98)	128.36%
8260 - Repair/Maint for Building/Equip	\$14,208.00	\$89,556.20	(\$75,348.20)	630.32%
Total - 8200 - Facility & equipment expenses	\$31,708.00	\$159,578.66	(\$127,870.66)	503.28%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$10,000.00	\$26,905.96	(\$16,905.96)	269.06%
8320 - Out of Area Travel	\$34,400.00	\$3,056.05	\$31,343.95	8.88%
8330 - Fuel Cost	\$3,500.00	\$5,119.81	(\$1,619.81)	146.28%
8335 - Vehicle Repair & Maint	\$3,500.00	\$1,507.28	\$1,992.72	43.07%
8340 - Child Transportation Exp	\$0.00	\$1,746.00	(\$1,746.00)	0.00%
Total - 8300 - Travel & meetings expenses	\$51,400.00	\$38,335.10	\$13,064.90	74.58%
8400 - Insurance Expense	\$23,500.00	\$60,020.52	(\$36,520.52)	255.41%
8700 - Food Expenses	\$46,800.00	\$181,238.13	(\$134,438.13)	387.26%
8800 - In-Kind Expenses	\$0.00	\$554,987.97	(\$554,987.97)	0.00%
Total - Expense	\$3,086,728.96	\$4,007,852.30	(\$921,123.34)	129.84%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$0.00	\$3,992.47	(\$3,992.47)	0.00%
8530 - Fees/Dues	\$865.00	\$41,948.48	(\$41,083.48)	4,849.54%
8540 - Training & TTA	\$39,957.00	\$69,949.28	(\$29,992.28)	175.06%
8560 - Computer & Software Related Expenses	\$0.00	\$9,863.29	(\$9,863.29)	0.00%
8570 - Advertising & Community Sponsorships	\$0.00	\$14,616.53	(\$14,616.53)	0.00%
8590 - Other Expenses	\$0.00	\$200.62	(\$200.62)	0.00%

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT	BUDGET BALANCE	% OF BUDGET
Total - 8500 - Other Expense	\$40,822.00	\$140,570.67	(\$99,748.67)	344.35%
Total - Other Expense	\$40,822.00	\$140,570.67	(\$99,748.67)	344.35%
Net Income	\$383,200.04	(\$175,243.40)	\$558,443.44	-45.73%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Dec 2023
Options: Activity Only

EHO Child Care Partnership

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$0.00	\$536.41	(\$536.41)	0.00%
4500 - Federal Revenue	\$2,216,745.00	\$359,606.00	\$1,857,139.00	16.22%
Total - Income	\$2,216,745.00	\$360,142.41	\$1,856,602.59	16.25%
Gross Profit	\$2,216,745.00	\$360,142.41	\$1,856,602.59	16.25%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$471,363.00	\$107,249.01	\$364,113.99	22.75%
7230 - Pension plan contributions	\$37,710.00	\$8,632.89	\$29,077.11	22.89%
7240 - Employee benefits - not pension	\$60,782.00	\$16,292.64	\$44,489.36	26.81%
7250 - Payroll taxes, etc.	\$40,302.00	\$8,288.57	\$32,013.43	20.57%
Total - 7200 - Salaries & related expenses	\$610,157.00	\$140,463.11	\$469,693.89	23.02%
7300 - Indirect Cost Pool Expense	\$123,968.00	\$28,452.78	\$95,515.22	22.95%
7500 - Contract/Consultant Services	\$1,016,075.00	\$143,968.68	\$872,106.32	14.17%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$64,000.00	\$44,209.99	\$19,790.01	69.08%
8120 - Other/Maint Supplies	\$5,000.00	\$0.00	\$5,000.00	0.00%
8130 - Telephone & Internet	\$14,400.00	\$1,088.91	\$13,311.09	7.56%
8140 - Postage & shipping	\$0.00	\$58.68	(\$58.68)	0.00%
8150 - Medical/Dental Supplies	\$1,000.00	\$471.49	\$528.51	47.15%
8160 - Events/Meeting Expense	\$0.00	\$10.34	(\$10.34)	0.00%
8170 - Printing & copying	\$15,000.00	\$697.04	\$14,302.96	4.65%
8180 - Fatherhood	\$2,000.00	\$0.00	\$2,000.00	0.00%
Total - 8100 - Non personnel expenses	\$101,400.00	\$46,536.45	\$54,863.55	45.89%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$179.05	(\$179.05)	0.00%
8220 - Electric	\$720.00	\$2,589.24	(\$1,869.24)	359.62%
8225 - Water	\$500.00	\$22.11	\$477.89	4.42%
8230 - Trash	\$300.00	\$145.98	\$154.02	48.66%
8235 - Sewer	\$300.00	\$10.16	\$289.84	3.39%
8240 - Natural Gas	\$500.00	\$36.19	\$463.81	7.24%
8250 - Equip & Over \$5000.00 (Inv Items)	\$122,122.00	\$0.00	\$122,122.00	0.00%
8260 - Repair/Maint for Building/Equip	\$47,250.00	\$1,708.89	\$45,541.11	3.62%
Total - 8200 - Facility & equipment expenses	\$171,692.00	\$4,691.62	\$167,000.38	2.73%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$7,500.00	\$1,380.51	\$6,119.49	18.41%
8320 - Out of Area Travel	\$5,250.00	\$525.06	\$4,724.94	10.00%
8330 - Fuel Cost	\$5,000.00	\$701.77	\$4,298.23	14.04%
8335 - Vehicle Repair & Maint	\$0.00	\$84.74	(\$84.74)	0.00%
Total - 8300 - Travel & meetings expenses	\$17,750.00	\$2,692.08	\$15,057.92	15.17%
8400 - Insurance Expense	\$6,300.00	\$0.00	\$6,300.00	0.00%
8700 - Food Expenses	\$3,000.00	\$49.95	\$2,950.05	1.67%
8800 - In-Kind Expenses	\$0.00	\$536.41	(\$536.41)	0.00%
Total - Expense	\$2,050,342.00	\$367,391.08	\$1,682,950.92	17.92%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$25,000.00	\$0.00	\$25,000.00	0.00%
8530 - Fees/Dues	\$1,500.00	\$715.20	\$784.80	47.68%

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT	BUDGET BALANCE	% OF BUDGET
8540 - Training & TTA	\$42,863.00	\$6,008.36	\$36,854.64	14.02%
8560 - Computer & Software Related Expenses	\$0.00	\$6.12	(\$6.12)	0.00%
8570 - Advertising & Community Sponsorships	\$7,500.00	\$2,155.22	\$5,344.78	28.74%
8590 - Other Expenses	\$2,000.00	\$0.00	\$2,000.00	0.00%
8595 - Subsidy Expense	\$89,540.00	\$35,128.60	\$54,411.40	39.23%
Total - 8500 - Other Expense	\$168,403.00	\$44,013.50	\$124,389.50	26.14%
Total - Other Expense	\$168,403.00	\$44,013.50	\$124,389.50	26.14%
Net Income	(\$2,000.00)	(\$51,262.17)	\$49,262.17	2,563.11%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Dec 2023
Options: Activity Only

*Early Head Start
2023*

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$0.00	\$60,909.54	(\$60,909.54)	0.00%
4500 - Federal Revenue	\$999,189.00	\$853,686.00	\$145,503.00	85.44%
Total - Income	\$999,189.00	\$914,595.54	\$84,593.46	91.53%
Gross Profit	\$999,189.00	\$914,595.54	\$84,593.46	91.53%
Expense				
7200 - Salaries & related expenses	\$698,436.12	\$615,688.31	\$82,747.81	88.15%
7300 - Indirect Cost Pool Expense	\$121,515.00	\$113,997.40	\$7,517.60	93.81%
7500 - Contract/Consultant Services	\$2,500.00	\$8,248.96	(\$5,748.96)	329.96%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$31,840.00	\$29,868.22	\$1,971.78	93.81%
8120 - Other/Maint Supplies	\$0.00	\$2,077.62	(\$2,077.62)	0.00%
8130 - Telephone & Internet	\$10,000.00	\$6,220.74	\$3,779.26	62.21%
8140 - Postage & shipping	\$0.00	\$151.26	(\$151.26)	0.00%
8150 - Medical/Dental Supplies	\$2,500.00	\$4,939.46	(\$2,439.46)	197.58%
8160 - Events/Meeting Expense	\$0.00	\$430.22	(\$430.22)	0.00%
8170 - Printing & copying	\$1,500.00	\$3,735.40	(\$2,235.40)	249.03%
Total - 8100 - Non personnel expenses	\$45,840.00	\$47,422.92	(\$1,582.92)	103.45%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$161.74	(\$161.74)	0.00%
8220 - Electric	\$12,000.00	\$11,833.20	\$166.80	98.61%
8225 - Water	\$1,000.00	\$1,543.62	(\$543.62)	154.36%
8230 - Trash	\$1,000.00	\$2,007.03	(\$1,007.03)	200.70%
8235 - Sewer	\$1,000.00	\$976.27	\$23.73	97.63%
8240 - Natural Gas	\$500.00	\$1,067.61	(\$567.61)	213.52%
8260 - Repair/Maint for Building/Equip	\$27,000.00	\$9,305.47	\$17,694.53	34.46%
Total - 8200 - Facility & equipment expenses	\$42,500.00	\$26,894.94	\$15,605.06	63.28%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$5,000.00	\$4,328.97	\$671.03	86.58%
8320 - Out of Area Travel	\$4,028.00	\$436.95	\$3,591.05	10.85%
8330 - Fuel Cost	\$0.00	\$788.72	(\$788.72)	0.00%
8335 - Vehicle Repair & Maint	\$0.00	\$182.99	(\$182.99)	0.00%
Total - 8300 - Travel & meetings expenses	\$9,028.00	\$5,737.63	\$3,290.37	63.55%
8400 - Insurance Expense	\$13,500.00	\$14,777.84	(\$1,277.84)	109.47%
8700 - Food Expenses	\$22,070.00	\$20,470.05	\$1,599.95	92.75%
8800 - In-Kind Expenses	\$0.00	\$60,909.54	(\$60,909.54)	0.00%
Total - Expense	\$955,389.12	\$914,147.59	\$41,241.53	95.68%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$1,000.00	\$345.79	\$654.21	34.58%
8530 - Fees/Dues	\$0.00	\$8,263.31	(\$8,263.31)	0.00%
8540 - Training & TTA	\$19,304.00	\$18,259.81	\$1,044.19	94.59%
8560 - Computer & Software Related Expenses	\$0.00	\$2,087.40	(\$2,087.40)	0.00%
8570 - Advertising & Community Sponsorships	\$500.00	\$4,723.78	(\$4,223.78)	944.76%
8590 - Other Expenses	\$3,692.00	\$0.00	\$3,692.00	0.00%
Total - 8500 - Other Expense	\$24,496.00	\$33,680.09	(\$9,184.09)	137.49%
Total - Other Expense	\$24,496.00	\$33,680.09	(\$9,184.09)	137.49%
Net Income	\$19,303.88	(\$33,232.14)	\$52,536.02	-172.15%



900 N. Stiles Avenue
Oklahoma City, OK 73104, USA
405-815-6552 | Toll Free 800-879-6552
OKCOMMERCE.GOV

October 4, 2023

Becky Porter, Executive Director
LIFT Community Action Foundation (LIFT)
209 4th St.
Hugo, OK 74743

Dear Ms Porter:

The Oklahoma Department of Commerce/Community Development (ODOC/CD) is pleased to inform Region 5 that PY 2023 Department of Energy Weatherization Assistance Program (DOE WAP) funds are now available.

ODOC no longer requires an agency to service each county, every year. Your agency may allocate Program funds by county based on need and available resources. Although it is not required to serve every county annually, every county must be served over a period of time (for example, every 2 or 3 years). Any counties your agency decides not to serve this program year must be listed in the OKGrants Management Plan Justification box along with the planned year it is anticipated the counties will next be served.

<u>PY'23 Year to Date Total Award</u>		Required Homes ^{1 2}
Admin Amount	\$38,574	
Training and Technical Assistance	\$5,000	
Program Allocation (for Program Operations, Audit, Insurance, and Health & Safety)	\$230,332	
Total Award	\$273,906	26

*Table 1 **the agency must be within 10% of the required minimum homes*

For PY 2023, the Health and Safety budget cannot be initially budgeted at greater than 17% of Program Operation expenditures nor the Average Cost Per Unit (ACPU) greater than \$8,250. You may request ODOC permission to exceed either the H&S or ACPU threshold at any time during the contract period after initial contract execution. ODOC permission must be requested in writing via email through ODOC's Energy Projects Specialist. Please proceed to [OKGrants](#) to apply for DOE WAP funds and complete the five (5) following required forms:

1. Applicant Information
2. Detailed Line-Item Budget
3. Management Plan
4. Audit
5. Uploads
 1. Agency Quality Control Inspector Building Performance Institute Certification(s)
 2. Energy Auditor Building Performance Institute Certification(s) (optional)
 3. Waiting Lists
 4. MOUs with third party subcontractors (any) (including any other CAAs)

5. Copy of statement or agreement that will be used with subcontractors to verify Field Guide/SWS Contractor Compliance

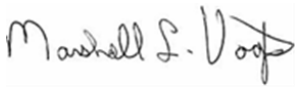
Application submission will begin the process for the preparation and execution of an ODOC contract for the following contract period: **April 1, 2023 – March 31, 2024**. Applications should be initiated and submitted as soon as possible, but no later than **November 3, 2023**.

Please understand that applying for this offer does not constitute your authority to expend funds or make any commitment of funds relative to the DOE WAP program until full execution of your contract has occurred. When you are notified that your contract is ready, carefully review it, taking note of all deadlines and the contract start date, as funds will not be reimbursed for expenditures before the start of the contract.

Please note that annual WAP funds may not be blended with BIL funds in the same home. Annual WAP funds may continue to be blended with DHS LIHEAP funds. Since WAP dollars will end sooner than BIL funding, please prioritize spending annual WAP funds before BIL homes. Ideally, your agency will have enough workforce capacity to complete both BIL and annual WAP/LIHEAP homes at the same time. Please continue to work with ODOC as needed to increase workforce capacity or for assistance with production planning.

We look forward to working with you. If you have any questions about your award or about how to initiate an application in OKGrants, please contact Kayla Cornett by email at kayla.cornett@okcommerce.gov or by phone at (405) 215-6240.

Sincerely,

A handwritten signature in dark ink, appearing to read "Marshall S. Vogts". The signature is fluid and cursive, with the first name "Marshall" and last name "Vogts" clearly legible.

Marshall Vogts, Director
Community Development

Funding Entity:	Oklahoma Housing Finance Agency
Funding Opportunity:	HOME Rental and CHDO Operating
Funding Amount:	\$800,000 (\$750,000 HOME Rental and \$50,000 CHDO Operating)
Due Date:	November 17, 2023

The HOME Investment Partnerships Program (HOME), funded through the U.S. Department of Housing and Urban Development provides formula grants to states and localities that to fund a wide range of activities including building, buying, and/or rehabilitating affordable housing for rent or homeownership or providing direct rental assistance to low-income people. HOME is the largest federal block grant to state and local governments designed exclusively to create affordable housing for low-income households. HOME funds are awarded annually as formula grants to participating jurisdictions (PJs). For the State of Oklahoma, the Oklahoma Housing Finance Agency (OHFA) is the participating jurisdiction.

LIFT CAA is requesting the Board's approval to submit an application to OHFA for \$800,000. Of this amount, \$750,000 will be used for construction (hard and soft costs) to construct two duplex apartment buildings in Valliant, Oklahoma. These units will be for households of low-income.

In addition, because LIFT CAA is a Community Housing Development Organization (CHDO), and the proposed activity of rental new construction is a CHDO eligible activity, if awarded the HOME rental request, LIFT CAA will be eligible for an additional \$50,000 in Community Housing Development Organization (CHDO) operating funds. CHDOs are eligible for set-aside funding from the U.S. Department of Housing and Urban Development's HOME Program. In order to use CHDO set-aside funds, CHDOs must be certified as owners, developers, or sponsors of HOME-assisted affordable housing.

This application is due on November 17, 2023 and award decisions will be made in January of 2024. If awarded, LIFT CAA expects to complete the construction of these units by December of 2026.

Funding Entity: U.S. Department of Health and Human Services,
Health Resources and Services Administration
Funding Opportunity: FY 2024 Healthy Start Initiative: Eliminating
Disparities in Perinatal Health Grant Application
Amount Requested: \$1,100,000

The Health Resources and Services Administration, Maternal and Child Health Bureau, Division of Healthy Start and Perinatal Services, is accepting competing continuation applications for the Healthy Start Initiative: Eliminating Disparities in Perinatal Health program. The purpose of this grant program is to improve health outcomes before, during, and after pregnancy and reduce the well-documented racial/ethnic differences in rates of infant death and adverse perinatal outcomes.

Healthy Start is intended to support projects in communities and populations experiencing the greatest disparities in maternal and infant health outcomes. The program has two focus areas: 1) providing direct and enabling services (for example, screening and referrals, case management and care coordination, health and parenting education, and linkage to clinical care) to enrolled Healthy Start participants; and 2) convening Community Consortia (formerly known as Community Action Networks) comprised of diverse, multi-sector partners to advise and inform Healthy Start activities as well as to develop and implement plans to improve perinatal outcomes within the selected project area. Healthy Start continues to have an increased emphasis on addressing social determinants of health, such as access to adequate food, housing, and transportation, to improve disparities in maternal and infant health outcomes. The FY 2024 grant competition also provides increased flexibility for grantees to tailor interventions to the unique needs of their community and/or target population.

With the Board's approval, we are requesting \$1,100,00 from the U.S. Department of Health and Human Services, Health Resources and Services Administration for Year 1 of a new five-year grant project (via competing continuation application). If awarded, this funding will be used to fully support the Healthy Start Program within Atoka, Choctaw, Coal, Latimer, McCurtain, and Pushmataha Counties for the first year of the grant period. The project will continue to address the needs of high-risk women and their families before, during, and after pregnancy. This will be achieved by placing emphasis on a community-based approach to providing care coordination, health education, counseling and supports. The anticipated benefit is the reduction of infant mortality, increased use of a primary medical home for mother and infant, and decreased co-factors which negatively impact pregnancy and the interconception period (smoking, drinking, substance use, domestic violence, and depression).

Choctaw Nation of Oklahoma Child Care Stabilization Grant Award, Year 3 (1st Quarter):

Broken Bow Early Learning Center: \$11,000

CNO Payment Remittance Advice

10/06/2023

From Payer	Choctaw Nation of Oklahoma 1802 Chukka Hina Durant Oklahoma US 74701	Supplier or Party To Payee	LIFT COMMUNITY ACTION AGENCY INC LIFT COMMUNITY ACTION AGENCY INC 209 N 4TH ST Hugo OK US 74743
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Remittance Detail							
Document Reference Number	Description	Date	Currency	Document Amount	Amount Withheld	Discount Taken	Amount Paid
10170029093023	PROVIDER ID#53 093023	09/30/2023	USD	4,027.30	0.00	0.00	4,027.30
10170029093023093023	PROVIDER ID#1157 093023	09/30/2023	USD	496.60	0.00	0.00	496.60
AB10170022100123	477 ARPA STABIL. GRANT BROKEN BOW OCT.- DEC. 2023	10/01/2023	USD	11,000.00	0.00	0.00	11,000.00
				Total	0.00	0.00	15,523.90

Funding Entity: Oklahoma Department of Education
Funding Opportunity: Child and Adult Care Food Program Grant
Award Amount: \$625,500
Agency Program: Head Start and Early Head Start Programs

OKLAHOMA STATE DEPARTMENT OF EDUCATION
 Welcome JORDAN MACK 11/6/2023, 10:46:48 AM
 Child Nutrition - Child & Adult Care Food Program (CACFP)
Alert Information
 DC-12-100 - LIFT COMMUNITY ACTION AGENCY INC
 209 N 4TH ST
 BELOVO, OK 74743
 Status:
 Reason:
 ITIN/EIN:
 Comments: Your application for participation in the CAP program has been approved for the contract agreement period of 10/15/2023 to 9/30/2024.
 Open Date:
 View Date:
 Close Date:
 Save
 For Additional Information:
 Child Nutrition Program
 2500 North Lincoln Blvd., Suite 330
 Oklahoma City, OK 73105-4599
 (405) 521-5327 Fax: (405) 521-2239

Type of Expense	Amount Projected
1. CACFP Administrative Labor ¹	39,500.00
2. CACFP Administrative Supplies ²	0.00
3. CACFP Administrative Expenses ³	0.00
4. CACFP-Related Travel ⁴	1,500.00
5. CACFP-Related Training Education ⁵	0.00
6. Indirect Costs ⁶	38,000.00
7. Other Administrative Services ⁷	0.00
8. Food Service Salaries/Benefits ⁸	200,000.00
9. Food Service Rent/Utilities Janitorial	0.00
10. Food Service Equipment	0.00
11. Food and Milk Purchases	325,000.00
12. CACFP Food-related Expenses	20,500.00
13. Miscellaneous/Other Operational CACFP Costs	1,000.00
Total Projected CACFP Expenditures	625,500.00

The Child and Adult Care Food Program (CACFP) is a Federal program that provides reimbursements for nutritious meals and snacks to eligible children and adults who are enrolled for care at participating child care centers, day care homes, and adult day care centers. CACFP also provides reimbursements for meals served to children and youth participating in afterschool care programs, children residing in emergency shelters, and adults over the age of 60 or living with a disability and enrolled in day care facilities. CACFP contributes to the wellness, healthy growth, and development of young children and adults in the United States.

Funding is provided to the Oklahoma State Department of Education (the state sponsoring agency) from the United States Department of Agriculture based on claims submitted by program participants. LIFT Community Action Agency's Head Start/Early Head Start Programs are requesting the Board's approval to accept an award from the Oklahoma Department of Education in the amount of \$625,500 for the Child and Adult Care Food Program. These funds will provide an opportunity to be reimbursed for a portion of the costs of meals and snacks served to enrolled children in the 28 Head Start classrooms and three Early Head Start centers. The total requested is an estimate of food, milk, food-related supplies, and cooks' salaries/benefits needed for food service operations under the programs.

Funding Entity: Oklahoma Department of Education
Funding Opportunity: Child and Adult Care Food Program Grant
Award Amount: \$142,300
Agency Program: Early Learning Centers




OKLAHOMA STATE DEPARTMENT OF EDUCATION

Welcome KELLY L. THOMAS Title: 10/6/2023, 3:05:02 PM
 Child Nutrition - Child & Adult Care Food Program (CACFP)
 Alert Information

[Applications](#)

[Home](#)
[Log Out](#)
[Privacy Statement](#)

In Process:
 App Approved App Approved

 Your application for participation in the CNP program has been approved for the contract agreement period of 10/1/2023 to 9/30/2024

For Additional Information:
 Child Nutrition Programs
 2500 North Lincoln Blvd., Suite 310
 Oklahoma City, OK 73105-4599
 (405) 521-3327 fax: (405) 521-2239

The Child and Adult Care Food Program (CACFP) is a Federal program that provides reimbursements for nutritious meals and snacks to eligible children and adults who are enrolled for care at participating child care centers, day care homes, and adult day care centers. CACFP also provides reimbursements for meals served to children and youth participating in afterschool care programs, children residing in emergency shelters, and adults over the age of 60 or living with a disability and enrolled in day care facilities. CACFP contributes to the wellness, healthy growth, and development of young children and adults in the United States.

Funding is provided to the Oklahoma State Department of Education (the state sponsoring agency) from the United States Department of Agriculture based on claims submitted by program participants. LIFT Community Action Agency's Early Learning Centers are requesting the Board's approval to accept an award from the Oklahoma Department of Education in the amount of \$142,300 for the Child and Adult Care Food Program. These funds will provide an opportunity to be reimbursed for a portion of the costs of meals and snacks served to enrolled children at the four Early Learning Centers (Antlers, Broken Bow, Hugo, Idabel).

Funding Entity: Oklahoma Department of Education
Funding Opportunity: Child and Adult Care Food Program Grant
Award Amount: \$1,248,004.74 (Program Operations – \$168,004.74;
 Daycare Home Meal Reimbursement – Up to \$1,080,000)
Agency Program: Child and Adult Care Food Program



Oklahoma State Department of Education
 Welcome JOHNNA YOW 10/25/2023, 12:49:06 PM
 Child Nutrition - Child & Adult Care Food Program (CACFP)
Alert Information
 H-12-01 - LIFT COMMUNITY ACTION AGENCY, INC.
 PO BOX 697
 HUGO, OK 74743
 Status: New
 Reason: App Approved
 ITIN/EIN: 730772321
 Comments: Your application for participation in the CNP program has been approved for the contract agreement period of 10/1/2023 to 9/30/2024.
 Open Date: 10/25/2023 11:25:16 AM
 View Date:
 Close Date:

LIFT Community Action Agency has operated a Child and Adult Care Food Program (CACFP) since 1984. CACFP is a Federal food program that provides money for serving nutritious meals to enrolled children in licensed family day care homes. LIFT CAA provides the CACFP program in 37 counties in Oklahoma, and is one of the largest sponsors in the state. Through this program, our agency provides daycare home providers with training in nutrition, child development, safety, and sanitation. The program also provides daycare home providers with a reimbursement check based on meals served, up to a maximum of two main meals and one snack per child per day. This ensures that the children in these daycare homes receive nutritious meals. By providing free and low-cost food to child care providers, CACFP helps to ensure that children are well fed, able to concentrate, and ready to learn. As a result, providers in the program are being reimbursed for meals served to more than 3,000 children daily. Because the program works with a large number of daycare home providers, CACFP staff must be diligent and meticulous when it comes to management of the program and reporting. The day care homes regularly submit claims for reimbursement to the program, which must process the paperwork efficiently and correctly. LIFT CAA's CACFP staff conducts reviews and edit checks of day care homes at least three times a year to negate any compliance problems. The program is reviewed biennially by the State Department of Education, which administers the program in Oklahoma. With the Board's approval, we are asking to accept the CACFP Grant Award from the Oklahoma Department of Education in the amount of \$1,248,004.74. Of this total, \$168,004.74 will be used for training daycare home providers, site visits to monitor and assist these providers, and other operational budget needs. In addition, up to \$1,080,000 will be used for food reimbursement claims filed by participating daycare home providers.

SUBGRANTEE AGREEMENT

ADDENDUM:

Catalog of Federal Domestic Assistance (CFDA) Title: Juvenile Mentoring Program
CFDA Number: 16.726
Type of Assistance: Project Grants
Title of Program: OJJDP FY 19 Mentoring – 2019 Multi-State Application
Award Number: 2019-JU-FX-0013

This Memorandum of Agreement Addendum, signed on October 27, 2023, between Youth Collaboratory of Pittsburgh, PA and **Little Dixie Community Action Agency, Inc** is for the purposes of amending the scope of Youth Collaboratory's Mentoring+ project.

Contract Period January 1, 2023 to June 30, 2023
Period of Project Performance: February 1, 2023 to June 30, 2023
Match Enrollment Period: January 1, 2023 to June 30, 2023
Period of Reporting Requirements: January 1, 2023 to July 30, 2023

Amended Contract Period: January 1, 2023 to September 30, 2023
Amended Scope of Service: Support grant close out activities
Amended Period of Reporting Requirements: January 1, 2023 to September 30, 2023

Amended Total Budget Amount: \$51,600

All other activities and requirements as stipulated in the original Subgrantee Agreement remain unchanged.

Signature: Rebecca Porter
Date: 10/28/2023
Printed Name: Rebecca Porter
Title: Executive Director
Organization: LIFT Community Action Agency, Inc.

Signature: Kristen Truffa
Date: 10/27/2023
Printed Name: Kristen Truffa
Title: Deputy Director, Programs
Organization: Youth Collaboratory

10/19/2023

2022 e-file Activity Report

Page 1

08:51 AM

Saunders & Associates PLLC

Client LDCAA - LIFT Community Action Agency Inc EIN: 73-0772321
US Ext. Even Return.....\$0
US Even Return.....\$0

Activity

CLIENT COPY

Extension - Federal Extension

US - E-FILE COMPLETE 04/26 (Current Status)
Submission ID: 73227820231160854nw2

Previous Activity

- 04/26 Accepted
- 04/26 Sent to the IRS
- 04/26 Received at Lacerte
- 04/26 Sent to Lacerte
- 04/26 Ready to Send
- 04/26 Passed Validation
- 04/26 Failed Transmission

The program did not successfully transmit this tax filing.
The filing failed pre-submission validation.
Failed transmission on April 26, 2023
Validation Failure: Error 54: Validation Failure Code 1702
Resolution: There is a newer version of the Lacerte program
available. To update, go to the main client screen, select
Tools from the dropdown menu and select Lacerte Updates,
then repeat the step to go through the e-file Wizard.

US - ACCEPTED 10/18 (Current Status)
Submission ID: 732278202329109po6n1

Previous Activity

- 10/18 Sent to the IRS
- 10/18 Received at Lacerte
- 10/18 Sent to Lacerte
- 10/18 Ready to Send
- 10/18 Passed Validation

Oklahoma Return of Organization Exempt from Income Tax

Section 501(c) of the Internal Revenue Code

Form 512-E
2022**PART 1**

For the year January 1 - December 31, 2022, or other taxable year beginning:

2022

ending:

Name of Organization

Federal Employer Identification Number

Date Qualified for Tax Exempt Status

LIFT COMMUNITY ACTION AGENCY INC

73-0772321

1968

Address (Number and street)

209 N 4TH

City

State or Province

Country

ZIP or Foreign Postal Code:

HUGO

OK

UNITED STATES

74743

Place an 'X' if:

(1)

Initial Return

(2)

Final Return

(3)

Amended Return (See Schedule 512E-X on page 2)

PART 2: STATEMENT OF UNRELATED BUSINESS TAXABLE INCOME

(Please read instructions on pages 3-4)

Total Federal

Allocable Oklahoma

A Total unrelated trade or business income - applicable Federal Form(s) 990

B Total unrelated trade or business deductions - applicable Fed. Form(s) 990

C Unrelated business taxable income - enter here and on line 1 below

0

0

INCOME SUBJECT TO TAX

1	Unrelated business taxable income - from statement above (allocable to Oklahoma)	1	00
2	Other net income - provide schedule	2	00
3	Oklahoma Capital Gain deduction (provide Form 561-C)	3	00
4	Oklahoma taxable income (total of lines 1, 2 and 3)	4	00

TAX COMPUTATION

5	Tax at 4% of line 4. If trust, see rate schedule on page 3 and place an "1" in the box. If recapturing the Oklahoma Affordable Housing Tax Credit, add the recaptured credit here and enter a "2" in the box. If making an Okla. installment payment pursuant to IRC Sec. 965(h) and 68 OS Sec. 2368(K), add the installment payment here and enter a "3" in the box	5	00
6	Less: Other Credits Form (total from Form 511-CR)	6	00
7	Balance of tax due (line 5 minus line 6, but not less than zero)	7	00
8	2022 Oklahoma estimated tax and extension payments and prior year carryforward	8	00
9	Oklahoma withholding (provide Form 1099, Form 500A, Form 500B or other withholding statement)	9	00
10	Amount paid with original return and amount paid after it was filed (amended return only)	10	00
11	Any refunds or overpayment applied (amended return only)	11	00
12	Total of lines 8 through 11	12	00
13	Overpayment (if line 12 is larger than line 7 enter amount overpaid)	13	00
14	Amount of line 13 to be credited to 2023 estimated tax (original return only)	14	00



2022 Form 512-E - Page 2

Oklahoma Return of Organization Exempt from Income Tax

Name of Organization:: LIFT COMMUNITY ACTION AGENCY INC	Federal Employer Identification Number: 73-0772321
--	---

Amount from line 14 on page 1

00

Line 15 provides you the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Place the line number of the organization from page 4 of this form in the box below and enter the amount you are donating. If giving to more than one organization, put a "99" in the box and attach a schedule showing how you would like your donation split.

15	Donations from your refund	☐ \$2 ☐ \$5 ☐ \$	15	00
16	Add lines 14 and 15 and enter amount		16	00
17	Amount to be refunded to you (line 13 minus line 16)	Refund	17	00

Direct Deposit Note:

All refunds must be by direct deposit. See Direct Deposit Information on page 5 for details.

Is this refund going to or through an account that is located outside of the United States? Yes No

Deposit my refund in my: ☐ Checking Account ☐ Savings Account

Routing Number:

Account Number:

18	Tax Due (if line 7 is larger than line 12 enter tax due)	Tax Due	18	0 00
19	Donation: Public School Classroom Support Fund (For information regarding this fund, see page 4, #5)		19	00
20	For delinquent payment, add penalty of 5% plus interest at 1.25% per month		20	00
21	Underpayment of estimated tax interest	Annualized	21	00
22	Total tax, penalty and interest due - Add lines 18-21; pay in full with return	Balance Due	22	0 00

Under penalty of perjury, I declare the information contained in this document, attachments and schedules are true and correct to the best of my knowledge and belief.

Signature of Office or Trustee	Date
Printed Name	
Title	Phone Number

Check this box if the Oklahoma Tax Commission may discuss this return with your tax preparer.



Signature of Preparer	Date
Printed Name of Preparer	
DEBORAH BONNER CPA SAUNDERS&ASSOCPLLC	
Phone Number	Preparer's PTIN
580-332-8548	P01385237

SCHEDULE 512-E-X: AMENDED RETURN SCHEDULE (See instructions on page 3)

A Did you file an amended Federal income tax return? ☐ Yes ☐ No

Provide a copy of the amended Federal return and a copy of "Statement of Adjustment", IRS refund check or deposit slip.

B If this return is being filed due to a Federal audit, provide a complete copy of the RAR.

C Explanation or reason for amended return (Provide all necessary schedules):

Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

A For the 2022 calendar year, or tax year beginning , 2022, and ending , 20																														
B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%; vertical-align: top;"> C LIFT Community Action Agency Inc 209 N. 4th St. Hugo, OK 74743 </td> <td style="width:40%; vertical-align: top;"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>D Employer identification number</td> <td>73-0772321</td> </tr> <tr> <td>E Telephone number</td> <td>580-326-3351</td> </tr> <tr> <td>G Gross receipts \$</td> <td>23,496,315.</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> F Name and address of principal officer: Same As C Above </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>H(a) Is this a group return for subordinates?</td> <td>☐ Yes ☒ No</td> </tr> <tr> <td>H(b) Are all subordinates included?</td> <td>☐ Yes ☐ No</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>I Tax-exempt status:</td> <td>☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>J Website: www.liftca.org</td> <td>H(c) Group exemption number</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other</td> <td>L Year of formation: 1968</td> <td>M State of legal domicile: OK</td> </tr> </table> </td> </tr> </table>	C LIFT Community Action Agency Inc 209 N. 4th St. Hugo, OK 74743	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>D Employer identification number</td> <td>73-0772321</td> </tr> <tr> <td>E Telephone number</td> <td>580-326-3351</td> </tr> <tr> <td>G Gross receipts \$</td> <td>23,496,315.</td> </tr> </table>	D Employer identification number	73-0772321	E Telephone number	580-326-3351	G Gross receipts \$	23,496,315.	F Name and address of principal officer: Same As C Above		<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>H(a) Is this a group return for subordinates?</td> <td>☐ Yes ☒ No</td> </tr> <tr> <td>H(b) Are all subordinates included?</td> <td>☐ Yes ☐ No</td> </tr> </table>		H(a) Is this a group return for subordinates?	☐ Yes ☒ No	H(b) Are all subordinates included?	☐ Yes ☐ No	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>I Tax-exempt status:</td> <td>☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527</td> </tr> </table>		I Tax-exempt status:	☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>J Website: www.liftca.org</td> <td>H(c) Group exemption number</td> </tr> </table>		J Website: www.liftca.org	H(c) Group exemption number	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other</td> <td>L Year of formation: 1968</td> <td>M State of legal domicile: OK</td> </tr> </table>		K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other	L Year of formation: 1968	M State of legal domicile: OK
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Part I Summary			
Activities & Governance	1	Briefly describe the organization's mission or most significant activities: "Helping People - Changing Lives" - To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.	
	2	Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.	
	3	Number of voting members of the governing body (Part VI, line 1a)	27
	4	Number of independent voting members of the governing body (Part VI, line 1b)	27
	5	Total number of individuals employed in calendar year 2022 (Part V, line 2a)	409
	6	Total number of volunteers (estimate if necessary)	1,075
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	0.
	7b	Net unrelated business taxable income from Form 990-T, Part I, line 11	0.
Revenue	8	Contributions and grants (Part VIII, line 1h)	15,441,475.
	9	Program service revenue (Part VIII, line 2g)	6,259,478.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	96,269.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	659,754.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	22,456,976.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	10,376,847.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	10,542,735.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	12,346,846.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	12,842,666.
	b	Total fundraising expenses (Part IX, column (D), line 25)	22,723,693.
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	23,385,401.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	-266,717.
Net Assets or Fund Balance	19	Revenue less expenses. Subtract line 18 from line 12	106,824.
	20	Total assets (Part X, line 16)	19,268,264.
	21	Total liabilities (Part X, line 26)	841,972.
	22	Net assets or fund balances. Subtract line 21 from line 20	18,426,292.

Part II Signature Block			
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.			
Sign Here	Signature of officer	Date	
	Rebecca Reynolds	Executive Dir.	
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date
	Deborah Bonner, CPA	Deborah Bonner, CPA	
	Firm's name	Firm's EIN	Check ☐ if self-employed PTIN
	Saunders & Associates PLLC	20-8209116	
	Firm's address	Phone no.	
	630 East 17th Street	(580) 332-8548	
	Ada, OK 74820		

Form 990 (2022) LIFT Community Action Agency Inc

73-0772321

Page 2

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III. ☒ **X**

1 Briefly describe the organization's mission:

To improve the lives of low-income individuals and families through service and
collaboration leading to self-sufficiency.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 10,683,874. including grants of \$) (Revenue \$ 2,372,358.)

See Schedule O

4b (Code:) (Expenses \$ 3,394,593. including grants of \$) (Revenue \$ 197,381.)

See Schedule O

4c (Code:) (Expenses \$ 2,900,734. including grants of \$) (Revenue \$ 5,750.)

See Schedule O

4d Other program services (Describe on Schedule O.) See Schedule O

(Expenses \$ 2,412,810. including grants of \$) (Revenue \$ 986,671.)

4e Total program service expenses 19,392,011.

BAA

TEEA0102L 09/01/22

Form 990 (2022)

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A.	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I.		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II.		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III.		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I.		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II.		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III.		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV.		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? If "Yes," complete Schedule D, Part V.		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.	X	
b Did the organization report an amount for investments — other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.		X
c Did the organization report an amount for investments — program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.		X
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X.	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII.	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV.		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV.		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV.		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions.		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II.		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III.		X
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H.		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II.		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III.	22	X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J.	23	X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If a "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a.	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I.	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I.	25b	X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II.	26	X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III.	27	X
28 Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV.	28a	X
b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV.	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV.	28c	X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M.	29	X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M.	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I.	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II.	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I.	33	X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2.	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2.	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI.	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note: All Form 990 filers are required to complete Schedule O.	38	X

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V. ☐

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable.	1a	101
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable.	1b	0
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. 2a 409		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O.	3b	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
d If "Yes," indicate the number of Forms 8282 filed during the year 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12	10a	
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders	11a	
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year. 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state?	13a	
Note: See the instructions for additional information the organization must report on Schedule O.		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c Enter the amount of reserves on hand	13c	
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O.	14b	
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	15	X
If "Yes," see the instructions and file Form 4720, Schedule N.		
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?	16	X
If "Yes," complete Form 4720, Schedule O.		
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?	17	
If "Yes," complete Form 6069.		

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI. ☒ **X**

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year. 1a 27		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
b Enter the number of voting members included on line 1a, above, who are independent. 1b 27		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3	X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5	X
6 Did the organization have members or stockholders?	6	X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	8a	X
b Each committee with authority to act on behalf of the governing body?	8b	X
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O.	9	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a	X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
b Describe on Schedule O the process, if any, used by the organization to review this Form 990. See Schedule O		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13.	12a	X
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done. See Schedule O.	12c	X
13 Did the organization have a written whistleblower policy?	13	X
14 Did the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official. See Schedule O.	15a	X
b Other officers or key employees of the organization. See Schedule O.	15b	X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed OK

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. See Schedule O

20 State the name, address, and telephone number of the person who possesses the organization's books and records.

Organization 209 N. 4th St. Hugo OK 74743 580-326-3351

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII. ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Rebecca Reynolds Executive Dir.	40 0			X				115,953.	0.	20,872.
(2) Sheree Ensley Fiscal Officer	40 0			X				66,329.	0.	15,255.
(3) Cathie Carothers Board Member	0.5 0	X						0.	0.	0.
(4) Danny Cornish Board Member	0.5 0	X						0.	0.	0.
(5) Tina Foshee-Thomas Board Member	0.5 0	X						0.	0.	0.
(6) Jordan Hill Board Member	0.5 0	X						0.	0.	0.
(7) Kevin Cory Board Member	0.5 0	X						0.	0.	0.
(8) Cindy Logan Board Member	0.5 0	X						0.	0.	0.
(9) Kelli Stacey Board Member	0.5 0	X						0.	0.	0.
(10) Andrea Henkel Board Member	0.5 0	X						0.	0.	0.
(11) Vickie Leathers Board Member	0.5 0	X						0.	0.	0.
(12) Sandra Meeks Board Member	0.5 0	X						0.	0.	0.
(13) Dwight Satterfield Board Member	0.5 0	X						0.	0.	0.
(14) Brent Franks Board Member	0.5 0	X						0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee			
(15) Wade Scott Board Member	0.5 0	X					0.	0.	0.
(16) David Smith Board Member	0.5 0	X					0.	0.	0.
(17) Vicky Wade Board Member	0.5 0	X					0.	0.	0.
(18) William Smith Board Member	0.5 0	X					0.	0.	0.
(19) Patsy Guess Board Member	0.5 0	X					0.	0.	0.
(20) Jia Johnson Board Member	0.5 0	X					0.	0.	0.
(21) Craig Young Board Member	0.5 0	X					0.	0.	0.
(22) David Hawkins Chairman	2 0	X		X			0.	0.	0.
(23) Leah Savage Vice Chairman	1.5 0	X		X			0.	0.	0.
(24) Brad Burgett Sec/Treas	1 0	X		X			0.	0.	0.
(25) Kara Maness Board Member	0.5 0	X					0.	0.	0.
1b Subtotal							182,282.	0.	36,127.
c Total from continuation sheets to Part VII, Section A							0.	0.	0.
d Total (add lines 1b and 1c)							182,282.	0.	36,127.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **1**

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
Total Cleaning Service PO Box 64 Hugo, OK 74743	Janitorial	145,134.
Sammie Beshirs 206 FM 906 East Powderly, TX 75473	Construction	114,845.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **2**

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII. ☐

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants, and Other Similar Amounts	1a Federated campaigns	1a				
	b Membership dues	1b				
	c Fundraising events	1c	2,043.			
	d Related organizations	1d				
	e Government grants (contributions)	1e	15,058,434.			
	f All other contributions, gifts, grants, and similar amounts not included above	1f	946,386.			
	g Noncash contributions included in lines 1a-1f	1g	909,757.			
	h Total. Add lines 1a-1f.		16,006,863.			
Program Service Revenue	Business Code					
	2a <u>Program Fees</u>	624200	3,562,160.	3,562,160.		
	b <u>Program Recoveries</u>	900099	3,119,566.	3,119,566.		
	c					
	d					
	e					
	f All other program service revenue					
	g Total. Add lines 2a-2f.		6,681,726.			
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		123,122.			123,122.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6a Gross rents	6a (i) Real (ii) Personal	644,797.			
	b Less: rental expenses	6b				
	c Rental income or (loss)	6c	644,797.			
	d Net rental income or (loss)		644,797.	644,797.		
	7a Gross amount from sales of assets other than inventory	7a (i) Securities (ii) Other				
	b Less: cost or other basis and sales expenses	7b		4,090.		
	c Gain or (loss)	7c		-4,090.		
	d Net gain or (loss)		-4,090.	-4,090.		
	8a Gross income from fundraising events (not including \$ 2,043. of contributions reported on line 1c). See Part IV, line 18	8a				
	b Less: direct expenses	8b				
	c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities. See Part IV, line 19	9a				
	b Less: direct expenses	9b				
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less returns and allowances	10a				
b Less: cost of goods sold	10b					
c Net income or (loss) from sales of inventory						
Miscellaneous Revenue	Business Code					
	11a <u>Miscellaneous</u>	900099	39,807.	39,807.		
	b					
	c					
	d All other revenue					
	e Total. Add lines 11a-11d.		39,807.			
12 Total revenue. See instructions.		23,492,225.	7,362,240.	0.	123,122.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX. ☒ X

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	218,409.	187,745.	30,664.	0.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	8,008,802.	6,884,495.	1,124,307.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.	2,315,524.	1,946,852.	368,672.	
10 Payroll taxes.				
11 Fees for services (nonemployees):				
a Management.				
b Legal.				
c Accounting.				
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	1,291,569.	1,107,823.	183,746.	
12 Advertising and promotion.	105,247.	81,604.	23,643.	
13 Office expenses.	10,520.	5,377.	5,143.	
14 Information technology.				
15 Royalties.				
16 Occupancy.	999,383.	947,260.	52,123.	
17 Travel.	442,611.	392,722.	49,889.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.	73,762.	46,447.	27,315.	
20 Interest.	9,565.	556.	9,009.	
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	215,370.		215,370.	
23 Insurance.	1,811,270.	461,317.	1,349,953.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a <u>Supplies</u>	1,585,140.	1,557,543.	27,597.	
b <u>Indirect Costs</u>	1,541,816.	1,531,445.	10,371.	
c <u>Food</u>	1,203,654.	1,185,352.	18,302.	
d <u>Other</u>	1,146,127.	747,056.	399,071.	
e All other expenses. See Sch. O.	2,406,632.	2,308,417.	98,215.	
25 Total functional expenses. Add lines 1 through 24e.	23,385,401.	19,392,011.	3,993,390.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X. ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash – non-interest-bearing	9,917,135.	1	9,305,903.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net	1,246,860.	3	1,890,894.
	4 Accounts receivable, net	805,820.	4	919,570.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net	578,596.	7	485,630.
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	3,597.	9	24,618.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 15,190,228.		
	b Less: accumulated depreciation	10b 7,883,571.		
		6,716,256.	10c	7,306,657.
	11 Investments – publicly traded securities		11	
	12 Investments – other securities. See Part IV, line 11		12	
	13 Investments – program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11		15		
16 Total assets. Add lines 1 through 15 (must equal line 33)	19,268,264.	16	19,933,272.	
Liabilities	17 Accounts payable and accrued expenses	582,732.	17	700,360.
	18 Grants payable		18	
	19 Deferred revenue	204,785.	19	3,722.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	54,455.	23	15,873.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D ..		25	
	26 Total liabilities. Add lines 17 through 25	841,972.	26	719,955.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33. ☒			
	27 Net assets without donor restrictions	15,547,505.	27	16,859,468.
	28 Net assets with donor restrictions	2,878,787.	28	2,353,849.
	Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33. ☐			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances.	18,426,292.	32	19,213,317.
	33 Total liabilities and net assets/fund balances.	19,268,264.	33	19,933,272.

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI. ☒ **X**

1	Total revenue (must equal Part VIII, column (A), line 12)	1	23,492,225.
2	Total expenses (must equal Part IX, column (A), line 25)	2	23,385,401.
3	Revenue less expenses. Subtract line 2 from line 1	3	106,824.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	18,426,292.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O) See Schedule O	9	680,201.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	19,213,317.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII. ☐

		Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		X
b	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis	X	
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	X	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	X	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	X	

2022

Name of the Organization

Employer Identification number

73-0772321

[illegible]

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations: _____
 - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Schedule A (Form 990) 2022

LIFT Community Action Agency Inc

73-0772321

Page 2

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	15687060.	15386044.	17062153.	15441475.	16006863.	79,583,595.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0.
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
4 Total. Add lines 1 through 3	15687060.	15386044.	17062153.	15441475.	16006863.	79,583,595.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						0.
6 Public support. Subtract line 5 from line 4.						79,583,595.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4.	15687060.	15386044.	17062153.	15441475.	16006863.	79,583,595.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.	712,751.	717,092.	656,805.	726,373.	767,919.	3,580,940.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	26,381.	8,504.	5,630.	57,789.	39,807.	138,111.
11 Total support. Add lines 7 through 10.						83,302,646.
12 Gross receipts from related activities, etc. (see instructions).					12	31,580,408.

13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f)).	14	95.54 %
15 Public support percentage from 2021 Schedule A, Part II, line 14.	15	95.73 %

16a 33-1/3% support test—2022. If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization. ☒

b 33-1/3% support test—2021. If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization. ☐

17a 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization. ☐

b 10%-facts-and-circumstances test—2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization. ☐

18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. ☐

BAA

Schedule A (Form 990) 2022

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						
6 Total. Add lines 1 through 5.						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b.						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6.						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here.** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f)).	15	%
16 Public support percentage from 2021 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f)).	17	%
18 Investment income percentage from 2021 Schedule A, Part III, line 17.	18	%

19a **33-1/3% support tests—2022.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization. ☐

b **33-1/3% support tests—2021.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization. ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally Integrated Supporting Organizations

- 1** Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).
- a** ☐ The organization satisfied the Activities Test. Complete **line 2** below.
- b** ☐ The organization is the parent of each of its supported organizations. Complete **line 3** below.
- c** ☐ The organization supported a governmental entity. Describe in **Part VI** how you supported a governmental entity (see instructions).

	Yes	No
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI .		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income

		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B – Minimum Asset Amount

		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C – Distributable Amount

			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	

- 7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

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Schedule A (Form 990) 2022

Schedule A (Form 990) 2022

LIFT Community Action Agency Inc

73-0772321

Page 7

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D – Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required – <i>provide details in Part VI</i>)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2022 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E – Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1 Distributable amount for 2022 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2022 (reasonable cause required – <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2022			
a From 2017.....			
b From 2018.....			
c From 2019.....			
d From 2020.....			
e From 2021.....			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2022 distributable amount			
i Carryover from 2017 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2022 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2022 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2023. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2018.....			
b Excess from 2019.....			
c Excess from 2020.....			
d Excess from 2021.....			
e Excess from 2022.....			

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Schedule A (Form 990) 2022

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Part II, Line 10 - Other Income

Nature and Source	2022	2021	2020	2019	2018
Other Income	\$ 39,807.	\$ 57,789.	\$ 5,630.	\$ 8,504.	\$ 26,381.
Total	<u>\$ 39,807.</u>	<u>\$ 57,789.</u>	<u>\$ 5,630.</u>	<u>\$ 8,504.</u>	<u>\$ 26,381.</u>

Additional Explanation of Other Income

Miscellaneous revenues are used to help defray the costs of operations.

**Schedule B
(Form 990)**

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Attach to Form 990 or Form 990-PF.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year: \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Schedule B (Form 990) (2022)

1 2 Page 2

Name of organization	Employer identification number
LIFT Community Action Agency Inc	73-0772321

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	DHHS-Admin for Children & Families 1301 Young St Dallas, TX 75202	\$ 6,613,491.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	Okla. Dept of Commerce 900 N Stiles OKC, OK 73104	\$ 719,919.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
3	Okla. Dept of Transportation 200 NE 21st St OKC, OK 73105	\$ 949,070.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
4	Health Resources & Service Admin. 5600 Fishers Lane Rockville, MD 20852	\$ 1,404,231.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
5	US Dept of Agriculture 1400 Independence Ave SW Washington, DC 20250	\$ 1,862,710.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
6	Okla. Dept of Education 2500 N Lincoln Blvd OKC, OK 73105	\$ 1,333,930.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
LIFT Community Action Agency Inc	73-0772321

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	Oklahoma Housing Finance Agency PO Box 26720 OKC, OK 73126	\$ 505,044.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
---	----- ----- ----- -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
---	----- ----- ----- -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
---	----- ----- ----- -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
---	----- ----- ----- -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
---	----- ----- ----- -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
---	----- ----- ----- -----	\$ -----	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Employer identification number

73-0772321

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	N/A		
----		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
----		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
----		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
----		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
----		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
----		\$-----	-----

Schedule B (Form 990) (2022)

1 1 Page 4

Name of organization
LIFT Community Action Agency Inc

Employer identification number
73-0772321

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) \$ _____ N/A
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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Schedule B (Form 990) (2022)

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

Name of the organization

Employer identification number

LIFT Community Action Agency Inc

73-0772321

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (for example, recreation or education) ☐ Preservation of a historically important land area

☐ Protection of natural habitat ☐ Preservation of a certified historic structure

☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2 a
b Total acreage restricted by conservation easements	2 b
c Number of conservation easements on a certified historic structure included in (a)	2 c
d Number of conservation easements included in (c) acquired after July 25, 2006 and not on a historic structure listed in the National Register	2 d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4 Number of states where property subject to conservation easement is located

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1. \$

(ii) Assets included in Form 990, Part X. \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1. \$

b Assets included in Form 990, Part X. \$

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

- a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange program
e ☐ Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1 a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance.....	1 c
d Additions during the year.....	1 d
e Distributions during the year.....	1 e
f Ending balance.....	1 f

2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII. ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance.....					
b Contributions.....					
c Net investment earnings, gains, and losses.....					
d Grants or scholarships.....					
e Other expenditures for facilities and programs.....					
f Administrative expenses.....					
g End of year balance.....					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment %
b Permanent endowment %
c Term endowment %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) Unrelated organizations.....	3a(i)	
(ii) Related organizations.....	3a(ii)	

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land.....		345,647.		345,647.
b Buildings.....		7,009,986.	2,254,075.	4,755,911.
c Leasehold improvements.....		2,123,011.	2,063,047.	59,964.
d Equipment.....		5,106,006.	3,566,449.	1,539,557.
e Other.....	605,578.			605,578.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.).....				7,306,657.

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Schedule D (Form 990) 2022

Part VII Investments – Other Securities.

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives.....		
(2) Closely held equity interests.....		
(3) Other -----		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
Total. (Column (b) must equal Form 990, Part X, column (B) line 12.) . . .		

Part VIII Investments – Program Related.

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) -----		
(2) -----		
(3) -----		
(4) -----		
(5) -----		
(6) -----		
(7) -----		
(8) -----		
(9) -----		
(10) -----		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.) . . .		

Part IX Other Assets.

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) -----	
(2) -----	
(3) -----	
(4) -----	
(5) -----	
(6) -----	
(7) -----	
(8) -----	
(9) -----	
(10) -----	
Total. (Column (b) must equal Form 990, Part X, column (B) line 15.) . . .	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
1. (1) Federal income taxes	
(2) -----	
(3) -----	
(4) -----	
(5) -----	
(6) -----	
(7) -----	
(8) -----	
(9) -----	
(10) -----	
(11) -----	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.) . . .	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII See Part XIII. ☒

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements.....	1	23,496,315.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
	a Net unrealized gains (losses) on investments.....	2a	
	b Donated services and use of facilities.....	2b	
	c Recoveries of prior year grants.....	2c	
	d Other (Describe in Part XIII.).....	2d	
	e Add lines 2a through 2d.....	2e	
3	Subtract line 2e from line 1.....	3	23,496,315.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
	a Investment expenses not included on Form 990, Part VIII, line 7b.....	4a	
	b Other (Describe in Part XIII.) See Part XIII.....	4b	-4,090.
	c Add lines 4a and 4b.....	4c	-4,090.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.).....	5	23,492,225.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements.....	1	23,385,401.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
	a Donated services and use of facilities.....	2a	
	b Prior year adjustments.....	2b	
	c Other losses.....	2c	
	d Other (Describe in Part XIII.).....	2d	
	e Add lines 2a through 2d.....	2e	
3	Subtract line 2e from line 1.....	3	23,385,401.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
	a Investment expenses not included on Form 990, Part VIII, line 7b.....	4a	
	b Other (Describe in Part XIII.).....	4b	
	c Add lines 4a and 4b.....	4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.).....	5	23,385,401.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Part X - FASB ASC 740 Footnote

LIFT Community Action Agency, Inc. qualifies as an organization exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code. LCAA is subject to a tax on income from any unrelated business. LCAA has no unrelated business income for 2022 or 2021.

The accounting standards on accounting for uncertainty in income taxes addresses the determination of whether tax benefits claimed or expected to be claimed on a tax

Part XIII Supplemental Information (continued)

Part X - FASB ASC 740 Footnote (continued)

return should be recorded in the financial statements. Under that guidance, LCAA may recognize the tax benefit from an uncertain tax position only if it is more likely than not that the tax position will be sustained on examination by taxing authorities based on the technical merits of the position. Examples of tax positions include the tax-exempt status of the organization and various positions related to the potential sources of unrelated business taxable income (UBIT). The tax benefits recognized in the financial statements from such a position are measured based on the largest benefit that has a greater than 50 percent likelihood of being realized upon ultimate settlement. There were no unrecognized tax benefits identified or recorded as liabilities for fiscal years 2022 and 2021.

LCAA files forms 990 in the U.S. federal jurisdiction and the State of Oklahoma. Federal and state income tax statutes dictate that tax returns filed in any of the previous three reporting periods remain open to examination. Currently, LCAA has no open examinations with the Internal Revenue Service or the Oklahoma Tax Commission.

Schedule D, Part XI, Line 4b
Other Revenue Included On Form 990 But Not Included In F/S

Gain/Loss Asset & Disposition.....	\$	-4,090.
	Total \$	<u>-4,090.</u>

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2022

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Department of the Treasury
Internal Revenue Service

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art – Works of art.....				
2 Art – Historical treasures.....				
3 Art – Fractional interests.....				
4 Books and publications.....				
5 Clothing and household goods.....				
6 Cars and other vehicles.....				
7 Boats and planes.....				
8 Intellectual property.....				
9 Securities – Publicly traded.....				
10 Securities – Closely held stock.....				
11 Securities – Partnership, LLC, or trust interests.....				
12 Securities – Miscellaneous.....				
13 Qualified conservation contribution – Historic structures.....				
14 Qualified conservation contribution – Other.....				
15 Real estate – Residential.....				
16 Real estate – Commercial.....				
17 Real estate – Other.....				
18 Collectibles.....				
19 Food inventory.....				
20 Drugs and medical supplies.....				
21 Taxidermy.....				
22 Historical artifacts.....				
23 Scientific specimens.....				
24 Archeological artifacts.....				
25 Other (Match.....)	X	9	909,757.	FMV
26 Other (.....)				
27 Other (.....)				
28 Other (.....)				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement.....

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?.....

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?.....

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?.....

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.

	Yes	No
30 a		X
31		X
32 a		X

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2022

Schedule M (Form 990) 2022 LIFT Community Action Agency Inc

73-0772321

Page 2

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

**Open to Public
Inspection**

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Form 990, Part III, Line 4a - Program Service Accomplishments

EARLY CHILDHOOD - Pre-school and daycare programs for low-income and handicapped children, funded by federal/state grants and parent fees. Early Childhood expenses are approximately 55% of program service expenses.

Early Head Start - 137 infants & toddlers received services through 3 centers. Early Head Start/Child Care Partnership/Early Learning Centers. A total of 297 infants & toddlers received childcare services through 7 partnership locations.

Head Start - 590 children were provided Head Start services in 28 classrooms.

Broken Bow Early Learning Center - Two facilities providing one-stop child care services for up to 81 children from birth through 12 year of age.

Child and Adult Care Food Program (CACFP) - Provided training and monitoring to 114 daycare homes in 38 counties. CACFP providers receive reimbursements for serving nutritious meals.

Form 990, Part III, Line 4b - Program Service Accomplishments

HOUSING - Rehab and weatherization of homes for low income and section 8 housing for low-income, funded by federal/state grants and tenant rental payments. Housing expenses are approximately 17% of program service expenses.

Homebuyer Education/Financial Counseling - Provided housing counseling, financial fitness, budgeting and/or credit counseling services to 10 individuals/families in 2022.

Multi-Family Housing - LIFT has 60 unit complex and triplexes in Valliant, Garvin, Fort Towson, Antlers, Soper and Boswell.

Self Help Housing - 19 families became homeowners in the eight Southeast Oklahoma counties serviced.

Weatherization - 30 homes were weatherized within the newly expanded territories of

Atoka, Bryan, Carter, Choctaw, Coal, Johnston, Love, Marshall, McCurtain, Murray,

Name of the organization	Employer identification number
LIFT Community Action Agency Inc	73-0772321

Form 990, Part III, Line 4b - Program Service Accomplishments

Pontotoc and Pushmataha in 2022 to reduce energy consumption making their homes more energy efficient and affordable.

Form 990, Part III, Line 4c - Program Service Accomplishments

COMMUNITY SERVICES - Provide necessary community services to reduce poverty and empower low-income families and individuals to become self-sufficient. Community Services expenses are approximately 15% of program service expenses.

Court Appointed Special Advocates (CASA) - 69 youth were served by 20 volunteers who contributed 1,310 volunteer hours in service to youth in the court system. 16 children had their cases resolved.

Healthy Start - 875 total participants, 310 pregnant women, 151 inter-conception participants, 171 children, 193 new babies, and 51 fathers were served within the tri-county area.

Rx for Oklahoma - 8 individuals were assisted in getting their prescriptions for free or a reduced cost.

Victims Advocacy Services - Provides support services for victims of crime. 103 victims were served in 2022. 1,038 victims received services since inception in July 2015.

Retired and Senior Volunteer Program (RSVP) - 264 volunteers (ages 55 and over) provided 33,966 hours of service to their communities at 47 volunteer stations, which equated to a dollar value of \$753,366.

Emergency Assistance - Through funding received from the Emergency Food & Shelter Program, CSBG-CARES, and local donations to the LIFT Emergency fund and through Salvation Army bell ringing, a total of 113 individuals/families received much needed emergency assistance.

Mentoring - Provided supportive services and one on one community-based mentoring relationships with 109 rural youth and their families, as a means to encourage

Schedule O (Form 990) 2022

Page 2

Name of the organization	Employer identification number
LIFT Community Action Agency Inc	73-0772321

Form 990, Part III, Line 4c - Program Service Accomplishments

positive behaviors and reduce the incidence of delinquency in the youth served.

Safe Place Healing Hearts - Served 258 victims in areas of domestic violence, sexual assault, dating violence, and stalking victims. Since inception in 2017 a total of 1,054 victims have been served.

Youth Build - Provided pathways to education and employment through provision of high school education, construction apprenticeship training and life skills activities. Served 13 individuals in 2022.

Tri-County Opioid - Educated 21 volunteer fire departments on how to administer Narcan/Naloxone, opioid misuse, and stigma surrounding opioid use disorder. Conducted 4 Medication Take Back events and received 59 lbs of prescription medicine for proper disposal. Partnered with Parents Helping Parents to start a parent support group for parents with children dealing with addiction issues or who are in recovery.

Form 990, Part III, Line 4d - Other Program Services Description

TRANSPORTATION - Provision of public transportation services, funded by federal grants, local contracts and participation fees. Transportation expenses are approximately 8% of program service expenses. 308,662 miles were driven with accounting for 56,135 passenger trips provided by a fleet of 41 vehicles. 13,768 elderly clients were served and 10,788 trips for passengers with disabilities were provided.

ECONOMIC DEVELOPMENT - Foster economic and industrial development in a three county enterprise community. Economic Development expenses are approximately 5% of total program service expenses.

Business Loan Program - 3 small business loans were serviced.

Intermediary Program - LIFT was designated by the Rural Housing Services division of

Name of the organization	Employer identification number
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Form 990, Part III, Line 4d - Other Program Services Description

USDA/Rural Development as an Intermediary assisting certified loan packagers in Texas, North Dakota, South Dakota, Kansas, Arkansas, Louisiana, Missouri, Nebraska and Oklahoma. In 2022, we assisted 19 non-profit agencies in those states in submitting 90 packagers to Rural Development for review and assisted with 39 closings.

State Parks - State Parks operated by LIFT include: Clayton Lake State Park, Hugo Lake State Park and Raymond Gary State Park.

Technical and Management Assistance Programs - T&MA staff provided training and monitoring to 21 self-help housing grantees in Region II with approximately \$24 million in Rural Development 502/504 construction/rehab budgets and approximately \$7 million in Rural Development Section 523 administrative budgets. 5 of the grantees operate a repair and rehab grant to provide technical assistance for homeowners to have decent, safe, sanitary and increased energy efficiency of their homes.

Form 990, Part VI, Line 11b - Form 990 Review Process

Fiscal Officer reviews 990 form, forwards to the Finance/Audit/Loan Committee for review, discussion, questions. F/A/L Committee approves form, recommends approval by full board. Governing board votes to approve form. Executive Director approves form. Form is filed. After filing of Form 990, it is made available to board and public via agency website, or by request.

Form 990, Part VI, Line 12c - Explanation of Monitoring and Enforcement of Conflicts

Board member training, annual conflict of interest statements signed by officers and board members, including Executive Director and Fiscal Officer.

Form 990, Part VI, Line 15a - Compensation Review & Approval Process - CEO & Top Management

Board of Directors annually reviews performance of Executive Director and executes employment contract.

Schedule O (Form 990) 2022

Page 2

Name of the organization	Employer identification number
LIFT Community Action Agency Inc	73-0772321

Form 990, Part VI, Line 15b - Compensation Review & Approval Process - Officers & Key Employees

Other employees are reviewed annually and compensation is determined by pay grade and scale and availability of funds.

Form 990, Part VI, Line 19 - Other Organization Documents Publicly Available

Tax returns and Single Audits are available on LIFT's website or upon request.

Other documentation is available upon request.

**Form 990, Part IX, Line 24e
Other Expenses**

	(A) Total	(B) Program Services	(C) Management & General	(D) Fundraising
Bad Debt Expense	-2,042.	-2,042.		
Direct Services	79,754.	77,897.	1,857.	
Equipment & Facilities	859,987.	794,985.	65,002.	
Fees, Licenses and Dues	141,830.	112,419.	29,411.	
Match Expense	909,757.	909,757.		
Printing and Publications	52,632.	51,906.	726.	
Repairs & Maintenance	326,065.	324,846.	1,219.	
Stipends	38,649.	38,649.		
Total	\$ 2,406,632.	\$ 2,308,417.	\$ 98,215.	\$ 0.

**Form 990, Part XI, Line 9
Other Changes in Net Assets Or Fund Balances**

Capitalized Fixed Assets.....	\$ 682,136.
Change in Accounting Principle.....	-1,935.
Total	\$ 680,201.

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships
Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

**Open to Public
Inspection**

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) ----- ----- -----					
(2) ----- ----- -----					
(3) ----- ----- -----					

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Sec 512(b)(13) controlled entity?	
						Yes	No
(1) Belmont Place Senior Housing 209 N 4th St Hugo, OK 74743 73-1664924	Housing Services	OK	501c3	Line 7	N/A		X
(2) Clayton Place Senior Housing 209 N 4th St Hugo, OK 74743 20-2371051	Housing Services	OK	501c3	Line 7	N/A		X
(3) Kiamichi Place Senior Housing 209 N 4th St Hugo, OK 74743 20-8359980	Housing Services	OK	501c3	Line 7	N/A		X
(4) Southeast Okla Community Dev Corp 209 N 4th St Hugo, OK 74743 20-2554357	Community & Neighborhood Development	OK	501c3	Line 7	N/A		X

Part III Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Dispropor- tionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) _____ _____ _____												
(2) _____ _____ _____												
(3) _____ _____ _____												

Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of- year assets	(h) Percentage ownership	(i) Sec 512(b)(13) controlled entity?	
								Yes	No
(1) _____ _____ _____									
(2) _____ _____ _____									
(3) _____ _____ _____									

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		X
b Gift, grant, or capital contribution to related organization(s)		X
c Gift, grant, or capital contribution from related organization(s)		X
d Loans or loan guarantees to or for related organization(s)		X
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		X
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		X
l Performance of services or membership or fundraising solicitations for related organization(s)		X
m Performance of services or membership or fundraising solicitations by related organization(s)		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)		X
o Sharing of paid employees with related organization(s)		X
p Reimbursement paid to related organization(s) for expenses		X
q Reimbursement paid by related organization(s) for expenses	X	
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) Belmont Place Senior Housing	q	14,589.	Cost
(2) Clayton Place Senior Housing	q	6,866.	Cost
(3) Kiamichi Place Senior Housing	q	10,728.	Cost
(4) Southeast Okla Community Dev Corp	q	30,677.	Cost
(5)			
(6)			

Part VI **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unre- lated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Dispropor- tionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1) _____ _____ _____													
(2) _____ _____ _____													
(3) _____ _____ _____													
(4) _____ _____ _____													
(5) _____ _____ _____													
(6) _____ _____ _____													
(7) _____ _____ _____													
(8) _____ _____ _____													

Schedule R (Form 990) 2022 LIFT Community Action Agency Inc

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Part VII **Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

Form **8868**
(Rev. January 2022)
Department of the Treasury
Internal Revenue Service

Application for Automatic Extension of Time To File an Exempt Organization Return

► File a separate application for each return.
► Go to www.irs.gov/Form8868 for the latest information.

OMB No. 1545-0047

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.		Taxpayer identification number (TIN)
	LIFT Community Action Agency Inc		73-0772321
	Number, street, and room or suite number. If a P.O. box, see instructions.		
	209 N. 4th St.		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	Hugo, OK 74743		

Enter the Return Code for the return that this application is for (file a separate application for each return)..... **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12
Form 990-T (corporation)	07		

• The books are in the care of ► Organization 209 N. 4th St. Hugo OK 74743

Telephone No. ► 580-326-3351

Fax No. ► _____

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until 11/15, 20 23, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☒ calendar year 20 22 or

► ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____.

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3 a If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.....	3 a \$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.....	3 b \$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.....	3 c \$	0.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2022)



LIFT COMMUNITY ACTION AGENCY, INC. ORGANIZATIONAL CONFLICT OF INTEREST POLICY & PROCEDURES

This is LIFT Community Action Agency, Inc.'s ("LIFT CAA" or the "Company") Policy and Procedures for understanding, avoiding, or mitigating Organizational Conflicts of Interest ("OCI").

I. POLICY

LIFT CAA recognizes that OCI are a significant issue for government contractors and the government alike, and is, therefore, committed to ensuring that our work is performed free of any conflict of interest—organizational and individual, actual and perceived. Mitigating and avoiding OCIs are part of LIFT CAA's key operating principles and are imperative for the success of the Company. At all levels, the importance of OCI mitigation is emphasized to employees and subcontractors as well as customers through written and verbal means. LIFT CAA is confident that strict adherence to its OCI Policy and Procedures (individually, the "Policy" and "Procedures") during the course of its business, along with an OCI Mitigation Plan ("Plan") for individual contracts when needed, will assure our customers that there will be no organizational and/or personal conflicts of interest involving our contracts.

It is important to note that it is not necessary for an OCI to exist to damage LIFT CAA, its business partners, and customers. The mere perception of a conflict of interest may be sufficient to cause considerable harm to the parties. As such, it is the policy of LIFT CAA to comply fully with all contract requirements and the Government's policies on identifying, avoiding, and mitigating OCIs in accordance with Federal Acquisition Regulation ("FAR") Subpart 9.5, Organizational and Consultant Conflicts of Interest. In LIFT CAA's role as a government contractor, our work could give rise to any of the three types of OCI, biased ground rules, unequal access to information, or impaired objectivity. The success of this Policy depends on the early identification of these potential, real, or perceived OCI issues and timely communication among affected business units, corporate personnel, subcontractors, and government customers.

LIFT CAA understands and fully supports the need to ensure the integrity of all work under government and any related contracts. As such, LIFT CAA is confident that following this Policy will ensure that there will be no OCIs or if OCIs are present, that they will be sufficiently avoided and mitigated.

II. OBJECTIVES

The objectives of this Policy are to:

1. Prevent the existence of conflicting roles that might bias LIFT CAA or its subcontractors' judgment or objectivity and subsequently affect the impartiality of the services provided to the Government;

2. Prevent an unfair competitive advantage to LIFT CAA or its subcontractors as a result of access to non-public competitively-useful information or LIFT CAA's or its teaming partners' involvement in setting the ground rules for a government contract;
3. Decide if it is necessary to develop a Plan for an individual contract; and
4. If a Plan is needed, provide the procedures for doing so.

III. PROCEDURES

In addition to following this Policy, as well as any individual Plan, LIFT CAA is required to continually screen past and proposed contract requirements, relationships, or financial interests, and disclose potential OCIs and recognize that potential conflicts might evolve during contract performance.

A. Understanding Our Obligations

It is critical that LIFT CAA and all of our employees understand this Policy and Procedures. To this end, each employee is trained in this Policy and Procedures, and each new employee is required to sign a statement concerning confidentiality, conflicts of interest, and unfair competitive advantage; departing employees sign an acknowledgment of their ongoing obligations. Employees may also be required to sign a Non-Disclosure Agreement ("NDA") when, for example, their position will require them to have access to LIFT CAA proprietary/confidential information, non-public competitively-useful information and/or sensitive Government information.¹

As an employee of a government contractor, it is essential to avoid the potential for conflicts of interest. FAR Subpart 9.5 identifies the following types of contracts as having the greatest potential for an OCI:

1. Management support services;
2. Consultant or other professional services;
3. Contractor performance of or assistance in technical evaluations;
4. Preparing specifications or work statements; or
5. Systems engineering and technical direction work.

This list is not exhaustive, and it is important to note that OCIs can arise under any type of contract. Conflicts of interest can prejudice the Government's best interest and void the rights of LIFT CAA and its subcontractors to participate in future procurements.

¹ LIFT CAA will ensure that its current employees, as of the effective date of this Policy and Procedures, also sign a statement concerning confidentiality, conflicts of interest, and unfair competitive advantage and an NDA, if appropriate.

All LIFT CAA employees are responsible for ensuring the work performed and services delivered are limited, as described below, in accordance with the requirements of FAR Subpart 9.5.

1. LIFT CAA and its subcontractors shall not release, disclose, or use information in any way that would permit or result in disclosure to any party outside the Government of information provided by the Government during or as a result of performance of this contract. Such information includes, but is not limited to, information submitted to the Government on a confidential basis by other persons. Further, the prohibition against release of Government-provided information extends to cover such information whether or not in its original form (e.g., where the information has been included in contractor-generated work or where it is discernible from materials incorporating or based upon such information). This prohibition does not expire at the conclusion of the contract under which the information was obtained.
2. LIFT CAA and its subcontractors shall not release, disclose, or use in any manner information generated or derived during or as a result of the performance of any contract that would permit or result in disclosure to any party outside the Government. This prohibition remains in effect for a period of three (3) years after completion of performance of the specific contract.
3. LIFT CAA and its subcontractors shall not furnish to the Government, either directly or indirectly, during the performance of the contract and for a period of three (3) years thereafter, any system, component, or service for which LIFT CAA has provided systems engineering and/or technical direction. Systems, components, or services will not be covered by this limitation if LIFT CAA had overall responsibility for development, integration, assembly, checkout, and/or production of the same.

B. Identifying Potential or Actual OCIs

The success of the Policy depends on the early identification of OCI issues and timely communication among potentially impacted teaming partners and government customers. Careful review of solicitations, contract statements of work, task orders, and other new business opportunities is the first line of defense. This review is the primary responsibility of the LIFT CAA Program Manager (“PM”) who is responsible for LIFT CAA’s pursuit of the new business opportunity. When assessing a new business opportunity, before LIFT CAA commits to pursue the work, the PM must answer the following:

1. Will the new business opportunity call for LIFT CAA or any of its teaming partners to be involved in preparing the specifications or statement of work for another federal contract?

2. Was LIFT CAA or any of its teaming partners involved, under the terms of another contract, in preparing or shaping the terms of the new business opportunity?
3. Will LIFT CAA or any of its teaming partners be in a position, under the new business opportunity, to evaluate work performed by LIFT CAA or any of its teaming partners under another contract, or vice versa?
4. Do LIFT CAA or any of its affiliates or teaming partners perform on any other contracts that create the opportunity for LIFT CAA or any of its affiliates or teaming partners, in performing the new business opportunity, to provide a financial benefit that may compromise the impartial judgment of LIFT CAA or any of its affiliates or teaming partners in performing the new business opportunity or any other contract?
5. Has LIFT CAA or any of its teaming partners received nonpublic, competitively useful information related to the new business opportunity?
6. Does the new business opportunity specifically identify certain procurements that create an OCI for the new business opportunity, and has LIFT CAA or any of its teaming partners worked on any of the identified procurements?
7. Will LIFT CAA need access to another contractor's proprietary data and, if so, is there an NDA in place between LIFT CAA and that company?

Additionally, before agreeing to terms with a teaming partner for a new business opportunity, the PM should ensure the teaming agreement or other written agreement between the parties requires the teaming partner to promptly disclose to LIFT CAA, in writing, if any actual, apparent, or potential OCIs arise with respect to the teaming partner's work on an existing project with LIFT CAA or based on its potential involvement in the pursuit of the new business opportunity.

C. Reporting Potential or Actual OCIs

Any LIFT CAA employee who discovers an actual or potential OCI shall immediately notify the appropriate PM for the project and the Executive Director in writing. This includes if the PM's answers to the questions in Section B indicate the potential for or an actual OCI for a new business opportunity; in that event the PM should provide prompt written notice to the Executive Director. Upon receiving such a notice, the Executive Director will direct the Company's assessment and implementation of its mitigation options and preparation of a Plan.

After going through the steps above, the Executive Director, in consultation with the appropriate PM, will determine if notification to the government and/or LIFT CAA's teaming partners is advisable or required. If a notice is required, it typically should include:

1. A description of the actual or potential OCI;
2. A description of the Plan or a copy of it;
3. Any other relevant information that would assist the Government or teaming partner in making a determination as to whether an OCI exists and if so, whether it can be effectively mitigated; and
4. Whether LIFT CAA believes it needs to withdraw from the project due to the OCI.

D. Resolving OCIs – Developing the Plan

When LIFT CAA determines that a potential or actual OCI impacts its work, LIFT CAA should assess whether it can prepare an OCI mitigation plan specific to the affected project. In some cases, a mitigation plan may not be feasible because the OCI could be unmitigable; in this event, recusal from the work is likely the only option. However, in many cases, it is possible to develop a suitable mitigation plan to neutralize if not eliminate the OCI – or to explain to the government or a teaming partner why LIFT CAA believes there is no OCI concern.

A Plan is generally an extensive document that includes a detailed assessment of the scopes of work that LIFT CAA or its affiliates or teaming partners are performing on two or more separate contracts that potentially create an OCI. LIFT CAA, together with its outside counsel, should carefully prepare the analysis of each contract, what is creating the potential OCI, and how it can be best mitigated if not eliminated.

Potential mitigation options for OCI are listed below. Please note that these are fact-dependent and not all mitigation strategies will be effective for each type of OCI and factual situation.

1. Firewalls – Separating or segregating management and operating personnel reporting lines. This may include personnel transfer restrictions between divisions as well as physical and/or geographical segregation, including security measures.
2. Confidentiality Agreements and/or NDAs – Specifying how employees should safeguard sensitive information and how to treat requests for information from anyone other than an individual with a need to know who is working on a particular contract. This can include information on identifying OCIs and copies of these agreements are to be kept in personnel files and the contract file.
3. Recusal – Foregoing future contracting opportunities that would create a potential or actual OCI.

4. Training for Personnel (immediate and/or ongoing) – Applicable to all personnel, but especially for those with confidentiality/NDA agreements. This resolution would also include a company-wide campaign ensuring OCI awareness is high and making compliance with this Policy visible, such as posters, discussion at company-wide meetings, etc. Entrance and exit procedures to reinforce confidentiality/NDA agreements are highly encouraged under this resolution.
5. Document and Information Control – Storage, handling, and transfer procedures for sensitive information and documents. This can be as simple as keeping sensitive documents in specific-colored folders (for easy identification) or keeping all electronic documents in one file and limiting access. It could also include periodic briefs to upper-level management to ensure against inadvertent dissemination.
6. Internal Audits or Reviews of Recordkeeping and Reporting Mechanisms.
7. Subcontracting Prohibitions or Limitations – This resolution can include flow down of mitigation procedures and plans to subcontractors and teammates or using a designated subcontractor.

LIFT C.A.A. HEAD START
209 NORTH 4TH STREET
HUGO, OK 74743
(580) 326-7581

HEAD START
STAFF QUALIFICATION WAIVER REQUEST

HEAD START REQUEST:

LIFT Head Start is requesting a waiver as outlined in the Head Start Act, Section 648A Teacher Qualifications, for a Head Start Teacher, **Jonna Reynolds:**

(B) As of October 1, 2011--

(i) an associate degree in early childhood education;

(ii) an associate degree in a related field and coursework equivalent to a major relating to early childhood education, with experience teaching preschool-age children; or

(iii) a baccalaureate degree and has been admitted into the Teach For America program, passed a rigorous early childhood content exam, such as the Praxis II, participated in a Teach For America summer training institute that includes teaching preschool children, and is receiving ongoing professional development and support from Teach For America's professional staff.

*(4) **WAIVER- On request, the Secretary shall grant--***

(B) as of October 1, 2011, a 3-year waiver of the requirements of paragraph (3)(B) for a Head Start agency that can demonstrate that--

(i) the agency has attempted unsuccessfully to recruit an individual who has the qualifications described in clause (i) or (ii) of such paragraph, with respect to an individual who is enrolled in a program that grants a degree described in clause (i) or (ii) of such paragraph and will receive such degree in a reasonable time; and

(ii) each Head Start classroom has a teacher who has, at a minimum--

(I) a child development associate credential that is appropriate to the age of children being served in center-based programs; or

(II) a State-awarded certificate for preschool teachers that meets or exceeds the requirements for a child development associate credential.

(III) the teacher can demonstrate that she/he has completed all prerequisites for a CDA or State awarded preschool certificate meeting or exceeding the requirements of the CDA and is awaiting the award of the CDA or certificate.

Council for Professional Recognition

JONNA SUE REYNOLDS

has satisfactorily demonstrated competence in working with young children through an assessment by the CDA® National Credentialing Program and is hereby awarded the Child Development Associate® (CDA) Credential™

Preschool Renewal



A handwritten signature in black ink, appearing to read "C. Reynolds", is written over a horizontal line.

Chief Executive Officer
Council for Professional Recognition

April 29, 2022

Credential Date

May 21, 2025

Expiration Date

C000021813

Credential Number

LIFT HEAD START PROGRAM CHANGE IN SCOPE APPLICATION: 12/1/2023 - 11/30/2024			
HSES/Budget Narrative Line Items by Category	Proposed Budget (FY 2024)	Change by Line Item (FY 2024 - FY 2023)	Current Budget (FY 2023)
a. PERSONNEL			
<i>Total Personnel</i>	\$2,038,720	-\$51,173	\$2,089,893
b. FRINGE PERSONNEL			
<i>Total Fringe Benefits</i>	\$691,009 *	\$1,596	\$689,413
c. TRAVEL			
1. Staff Out-of-Town Travel	\$3,400	\$0	\$3,400
<i>Total Travel</i>	\$3,400	\$0	\$3,400
e. SUPPLIES			
1. Office Supplies	\$1,250	\$0	\$1,250
2. Child and Family Services Supplies	\$12,000	\$0	\$12,000
<i>Total Supplies</i>	\$13,250	\$0	\$13,250
f. CONTRACTUAL			
2. Health/Disabilities Services	\$3,500	\$0	\$3,500
4. Child Transportation Services	\$6,000	\$0	\$6,000
5. Training and Technical Assistance	\$3,000	\$0	\$3,000
8. Other Contracts	\$33,200	\$0	\$33,200
<i>Total Contractual</i>	\$45,700	\$0	\$45,700
h. OTHER			
2. Rent	\$0	\$0	\$0
4. Utilities, Telephone	\$35,000	\$0	\$35,000
5. Building & Child Liability Insurance	\$23,500	\$0	\$23,500
6. Building Maintenance/Repair & Other Occupancy	\$14,208	\$0	\$14,208
8. Local Travel	\$10,000	\$0	\$10,000
9. Nutrition Services	\$46,800	\$0	\$46,800
10. Child Services Consultants	\$1,000	\$0	\$1,000
13. Parent Services	\$1,000	\$0	\$1,000
15. Publications/Advertising/Printing	\$2,160	\$0	\$2,160
16. Training or Staff Development	\$1,000	\$0	\$1,000
17.1 Other Costs	\$7,865	\$0	\$7,865
<i>Total Other</i>	\$142,533	\$0	\$142,533
INDIRECT CHARGES	\$536,183	\$49,577	\$486,606
Total Operating Expenses	\$3,470,795	\$0	\$3,470,795
T&TA	\$39,956	\$0	\$39,956
Total Head Start Budget	\$3,510,751		
Total Head Start/Early Head Start Budget	\$4,509,940		

LIFT EARLY HEAD START PROGRAM CHANGE IN SCOPE APPLICATION: 12/1/2023 - 11/30/2024	
HSES/Budget Narrative Line Items by Category	Proposed Budget (FY 2024)
a. PERSONNEL	
<i>Total Personnel</i>	\$512,515
b. FRINGE PERSONNEL	
<i>Total Fringe Benefits</i>	\$173,273 *
c. TRAVEL	
1. Staff Out-of-Town Travel	\$3,400
<i>Total Travel</i>	\$3,400
e. SUPPLIES	
1. Office Supplies	\$2,500
2. Child and Family Services Supplies	\$29,340
4. Other Supplies	\$2,500
<i>Total Supplies</i>	\$34,340
h. OTHER	
2. Rent	\$0
4. Utilities, Telephone	\$25,500
5. Building & Child Liability Insurance	\$13,500
6. Building Maintenance/Repair & Other Occupancy	\$27,000
8. Local Travel	\$5,000
9. Nutrition Services	\$22,070
10. Child Services Consultants	\$2,500
13. Parent Services	\$2,500
15. Publications/Advertising/Printing	\$2,000
17. Other	\$21,496
<i>Total Other</i>	\$121,566
INDIRECT CHARGES	\$134,791
Total Operating Expenses	\$979,885
T&TA	\$19,304
Total Early Head Start Budget	\$999,189
Total Head Start/Early Head Start Budget	\$4,509,940

Change by
Line Item
(FY 2024 -
FY 2023)

-\$9,431

-\$3,217

-\$628

-\$628

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$0

\$13,276

\$0

\$0

Current
Budget
(FY 2023)

\$521,946

\$176,490

\$4,028

\$4,028

\$2,500

\$29,340

\$2,500

\$34,340

\$0

\$25,500

\$13,500

\$27,000

\$5,000

\$22,070

\$2,500

\$2,500

\$2,000

\$21,496

\$121,566

\$121,515

\$979,885

\$19,304

LIFT CAA, Inc

2024 Agency Wide Budget

	2023	2024 Projections	Variance
Revenue			
Contribution(corp/foundations)		39,955.00	39,955.00
Inkind	1,125,000.00	1,210,285.00	85,285.00
Program	3,280,000.00	1,950,754.00	(1,329,246.00)
State		2,241,056.00	2,241,056.00
Federal	15,840,000.00	17,723,533.00	1,883,533.00
Recoveries	3,827,812.00	3,857,501.00	29,689.00
Interest	528,226.00	117,202.00	(411,024.00)
Fundraising	0.00	8,294.00	8,294.00
Total	24,601,038.00	27,108,625.00	2,507,587.00
Expense			
Salaries	8,125,000.00	9,539,712.00	1,414,712.00
Fringe	2,771,437.00	2,654,289.00	(117,148.00)
Indirect	2,112,500.00	1,992,894.00	(119,606.00)
Contractual	1,294,176.00	1,706,050.00	411,874.00
Non personnel oper	1,154,694.00	1,221,105.00	66,411.00
Facility & Equip (includes utilities)	2,388,075.00	2,424,702.00	36,627.00
Travel	350,950.00	677,333.00	326,383.00
Insurance	1,716,460.00	2,367,858.00	651,398.00
Food/Nutrition	1,319,772.00	1,769,714.00	449,942.00
Other	2,146,975.00	1,438,017.00	(708,958.00)
Emergency Assistance	95,999.00	106,666.00	10,667.00
Inkind	1,125,000.00	1,210,285.00	85,285.00
Total	24,601,038.00	27,108,625.00	2,507,587.00
		0.00	9.25%

**CONTRACT FOR CHILD ABUSE MULTIDISCIPLINARY TEAM ACCOUNT FUNDING
CALENDAR FISCAL YEAR 2024**

This contract is entered into between the **Oklahoma Commission on Children and Youth**, hereinafter referred to as **OCCY**, by virtue of the authority vested in it by Title 74 O.S. §85.1, and **LIFT Community Action Agency**, hereinafter referred to as **Contractor**.

The **Contractor**, otherwise known as the "lead agency" in Title 10A O.S. §1-9-102 A(2), shall be chosen by the members of the Freestanding Multidisciplinary Team (FSMDT) for **Choctaw County(ies)** and considered to be a "sole source" for the purpose of contracting. The **Contractor** acts on behalf of and at the direction of the FSMDT. The FSMDT directs the budget, expenses, and activities of the FSMDT in accordance with a Memorandum of Understanding (MOU) between the **Contractor** and the FSMDT or a subcontract between two legal entities. The **Contractor** must provide for the purposes of this contract an Office of Management and Enterprise Services (OMES) Vendor/Payee Form and a Form W-9.

All terms and conditions herein become the contract between the **OCCY** and the **Contractor**. The **Contractor** agrees to comply with all of these terms and conditions. The **Contractor** understands and agrees that when any term and/or condition contained within this contract is or becomes applicable to the **Contractor's** officers and/or employees (collectively, "organization"), the **Contractor** agrees to ensure that its organization abides by the terms and/or conditions applicable to the organization.

Contact Persons: For the purposes of this contract, the following are the appropriate persons with all contacts should be directed.

- **Contractor:** Rebecca Reynolds / 580-326-3351 / becky.reynolds@liftca.org
- **OCCY:** Brittany Gassner, FSMDT Program Manager / (405) 606-4919 / Brittany.Gassner@OCCY.ok.gov

Contract Funding: In accordance with Title 10 O.S. §1-9-102, **OCCY** may disburse the contracted amount at the beginning of the calendar year to the **Contractor** on behalf of the FSMDT upon the FSMDT satisfactorily being recognized by **OCCY** as a functioning FSMDT (see OAC 135:10-25-1 through 10-25-8). The maximum total of this contract is **\$ 35,916.71** for the period of January 1, 2024, through December 31, 2024. This contract shall not take effect and no funds may be disbursed until **OCCY** has in its possession the contract containing original signatures of both parties and a purchase order has been issued by OMES or another approved State agency.

The FSMDT will not be allowed to carryover or lapse funds of this contract period. Any funds not expended by the FSMDT by the end of this contract period shall be returned to **OCCY** no later than January 31st of the next year for deposit in the Child Abuse Multidisciplinary Account.

Contractor's Relationship to OCCY: The **Contractor** is in all respects an independent **Contractor** and is neither an agent nor an employee of the **OCCY**. Neither the **Contractor** nor its organization shall have authority to bind the **OCCY** nor are they entitled to any of the benefits or worker's compensation provided by the **OCCY** to its employees. In the event the independent **Contractor** relationship ends in any manner, this contract shall automatically terminate without notice. The **Contractor** shall immediately notify the **OCCY** Contract Monitor of the change in the relationship.

Duties of the Contractor (unless otherwise assigned or delegated by the FSMDT): The **Contractor** shall

- Comply with Oklahoma Statutes (Title 10A O.S. §1-9-102 et. seq.) and Rules (Title 135:1025-1 et. seq.) that may be applicable to the **Contractor**.
- Complete and provide with this contract the OMES Vendor/Payee Form (and if not previously completed, then the Electronic Funds Transfer Enrollment Request Form), OMES Non-Collusion Form (Form CP 004), Internal Revenue Service W-9.
- Provide with this contract the Budget Request Form and the Budget Narrative Form as completed by the FSMDT and initialed by the FSMDT Coordinator and described in the General Terms and Conditions – Allowable Expenses section of this contract. If the FSMDT lists any budget request for the category "Contractual / Sub-Contractual", then the **Contractor** shall also provide copies of contracts, professional service agreements, and/or Memorandums of Understanding (MOU) between the FSMDT and any entity that provides service(s) in the budget narrative. "Contractual / Sub-Contractual".
- Collaborate with the FSMDT to develop and sign a contract, professional service agreement, or MOU that establishes the relationship between the **Contractor** and the FSMDT and describes the duties to be performed by the **Contractor**, especially as the fiduciary agency, and, if applicable, in which the FSMDT agrees to pay the **Contractor** for their services.
- If applicable, provide a copy of any contracts, professional service agreements, and MOUs no later than 30 days after the agreement is entered.

- Submit to **OCCY** the Quarterly Expenditure Report form monthly, no later than the 15th of the month following the reporting quarter, documenting expenses. The **Contractor** agrees to maintain all supporting documentation of those expenses and, if requested by **OCCY**, provide those documents within two weeks of the request.

Duties of OCCY: The **OCCY** shall

- Complete and submit to OMES the Sole Source form (Form CP 002) regarding the Contractor.
- Notify the **Contractor** by the end of September of the contract year the FSMDT annual status that determines if the team receives funding for the forthcoming fiscal year.
- Initiate the funding disbursement process with OMES so funds can be disbursed to the **Contractor** on behalf of the FSMDT in a timely manner (typically January of the contract year).
- Promptly review quarterly expenditure reports submitted by the **Contractor** on behalf of the FSMDT and request supporting documentation of expenses at communicate with the **Contractor** any concerns regarding unallowable expenses.
- Complete random detailed reviews of supporting documentation of submitted quarterly reports to assure that team expenses are aligned with the FSMDT's approved budget, directly related to the FSMDT purpose, and reasonable in nature.
- Initiate process for **Contractor** to return to **OCCY** any Child Abuse Multidisciplinary Team Account funds not expended by the FSMDT by the end of the contract period.

GENERAL TERMS AND CONDITIONS

Access to Records Requirements: As used in this clause, records includes books, documents, accounting procedures and practices, and other data regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any contract with **OCCY**, the **Contractor** agrees that any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant contract.

The **Contractor** is required to retain records relative to the contract for the duration of the contract and for a period of seven years following completion and/or termination of the contract. If an audit, litigation, or other action involving such records is started before the end of the seven year period, the records are required to be maintained for two years from the date that all issues arising out of the action are resolved or until the end of the seven year retention period, whichever is later.

OCCY may request supporting documentation to validate any payments made on behalf of the FSMDT. Upon request from **OCCY**, the **Contractor** shall permit any representative of the State, **OCCY**, or other authorized agency with jurisdiction to conduct a site visit and inspect and audit the books and records of the **Contractor** related to the services and/or items purchased.

Allowable Expenses: All expenses must be directly related to the purpose of the FSMDT, be reasonable in cost, and included in a budget narrative approved by **OCCY**. The projected expenses should be included in a line-item budget within the following categories. The **Contractor** may want to refer to federal guidelines 2 CFR Part 200 for federal guidance on allowable expenditures.

- | | | |
|------------|----------------|---------|
| • Training | • Equipment | • Other |
| • Travel | • Subcontracts | |
| • Supplies | • Personnel | |

Amendments, Unavailability or Redirection of Funding, and Cancellation: All modifications or amendments to this contract shall be in writing, dated and executed by both the **Contractor** and the **OCCY**. Unless the contract is amended or canceled, the contract shall be in force until the expiration date. In the event State, federal, or other funds used to support this contract become unavailable, either in full or in part, the **OCCY** may terminate or reduce the contract upon notice in writing to the **Contractor** by certified mail. In addition, this contract may be canceled without cause 30 days after written notice has been given by either party of its desire to cancel without cause. Notification of cancellation shall be by certified mail to the business address of record. In the event this contract is canceled by either party, the **Contractor** shall be responsible for reimbursement to **OCCY** within 45 days of cancellation the any remaining CAMTA funds allotted to the team for the fiscal year of this contract. In the event this contract is canceled under this section, the **Contractor** agrees to take all reasonable steps to minimize termination costs. The **Contractor** agrees to submit to **OCCY** any outstanding expenditure reports and supporting documentation within 30 days of cancellation so that a final remaining balance can be confirmed by **OCCY**

Applicable Law: The validity, construction, and enforcement of this contract and all disputes that may arise in connection with its performance shall be governed by the laws of the State of Oklahoma without regard to its choice of law provisions. Any legal action relating in any manner to the subject matter of this contract shall be filed in a court of competent jurisdiction in the State of Oklahoma to which jurisdiction and venue the parties hereby expressly agree.

Assignment and Delegation: If the **Contractor** cannot perform the services as identified in this contract, in whole or in part, the **Contractor** will be responsible for subcontracting for the services. Subcontractors must comply with all applicable General Terms and Conditions included in this contract. All subcontracts must be provided to the **OCCY** no later than 30 days after the agreement is entered. Subcontracting of the services shall not relieve the **Contractor** of any responsibility for performance under this contract.

Audit / Availability of Records: If applicable, the **Contractor** must have a recent independent audit completed in accordance with Government Auditing Standards and 2 CFR Part 200. A certified public accountant or public accountant who has a valid and current permit to practice accountancy must perform the audit. **OCCY** retains the right to examine the work papers of said auditor. The **Contractor** must have available to **OCCY** a copy of the most recent completed annual audit along with a response to any audit findings and a copy of any management letter received within 120 calendar days of the conclusion of the contract period (i.e., March 31) to **OCCY**.

At the request of **OCCY** or the Office of the Oklahoma State Auditor and Inspector, the **Contractor** will provide books, records, documents, accounting procedures, practices, or any other item relevant to the contract for examination.

Budget Modification: The **Contractor**, at the request of the FSMDT, may modify its budget once a calendar month by transferring up to 10% of the total budget amount between categories within its budget. Transfer between categories of an amount greater than 10% of the total budget must have prior written approval from **OCCY** (an email is acceptable). The **Contractor** must submit to **OCCY** the Budget Modification form to document all modifications and no later than the end of the month in which the modification is made or requested. No modifications to the budget can be made after November 30 of the contract period.

Certification Regarding Debarment, Suspension, Proposed for Debarment, or Declared

Ineligible for Award of Contracts by any Federal or State Agency: By signing the contract, the **Contractor** attests and assures that no employee or any of its principals, including Subcontractors, performing hereunder:

- Are presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any federal agency;
- Have, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for commission or fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract; violation of federal or State antitrust statutes relating to the submission of offers; or, commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;
- Have, within a three-year period preceding this offer, had one or more contracts terminated for default by any federal, State, or local entity; nor,
- Are presently indicted for, or otherwise criminally indicted, or charged by a governmental entity with any of the offenses enumerated above in this section.

Confidential Information: If the **Contractor** has access to any confidential information relevant to the FSMDT, then the **Contractor** agrees to comply with all federal and State privacy laws and regulations, and the FSMDT confidentiality agreement.

Construction Costs: CAMTA funds shall not be used for construction purposes.

Contract Monitoring Plan: As a **Contractor** with the **OCCY**, this contract will be monitored to ensure compliance with the Duties, Terms, and/or Conditions outlined in this contract. Typical monitoring activities may include site visits, review of contractually required deliverables, review of expenditures and supporting documentation, and verification of licensure and/or insurance required and other monitoring activities.

The **OCCY** Contract Monitor for this contract is **Brittany Gassner, Programs Manager, Freestanding Multidisciplinary Teams, 2915 N. Classen Blvd, Suite 300, Oklahoma City, OK 73106; (405) 606-4919; Brittany.Gassner@OCCY.ok.gov.**

Disallowable Claims: If any cost items claimed by the **Contractor** on behalf of the FSMDT are subsequently disallowed by the **OCCY** with reason, the **Contractor** shall repay the **OCCY** the amount of any such disallowed items.

Entire Agreement: This contract, including referenced attachments, represents all of the terms and conditions agreed upon by the parties. No other understandings or representations, oral or otherwise, regarding the subject matter of this contract shall be deemed to exist or to bind any of the parties hereto.

Equal Opportunity and Discrimination: The **Contractor** agrees to comply with all federal and state laws prohibiting discrimination and assures services will be provided without distinction on the basis of race, sex, color, national origin, or disability and no other distinction will be made on the bases of age, except as the law allows.

Equipment: The equipment threshold is set by the FSMDT's written policy and should be available upon request. This policy shall be available for viewing by the **OCCY** Contract Monitor. Subject to the obligations and conditions set forth in this section, title to equipment acquired under a contract will vest upon acquisition in the FSMDT. Equipment records must be maintained and include a description of the equipment, a serial number or other identification number, the acquisition date, the cost of the equipment, and the location use and condition of the equipment.

A physical inventory of the equipment must be taken, and the results reconciled with the property records once every year. This information must be available to the **OCCY** Contract Monitor upon request. A control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the equipment. Any loss, damage, or theft shall be investigated. Adequate maintenance procedures must be developed to keep the equipment in good condition at the team's expense.

In the event that the FSMDT status changes to "Non-Functioning" and/or equipment is no longer of viable use to the FSMDT, the **Contractor** on behalf of the FSMDT shall contact **OCCY** for guidance on the future use or disposal of equipment. Communication on the use/disposal of equipment shall be in writing.

Event of Default: In the event the **Contractor** fails to meet the terms and conditions of this contract or fails to provide services in accordance with the provisions of the contract, the State of Oklahoma at its sole discretion, may cancel this contract by written notice and require the **Contractor** reimburse to **OCCY** any remaining CAMTA funds notice of default to the **Contractor**. Cancellation due to default shall not be an exclusive remedy, but shall be in addition to any other rights and remedies provided by law. In the event a Notice of Cancellation is issued, the **Contractor** shall have the right to request a review of such decision as provided by the rules and regulations promulgated by OMES Central Purchasing Division. This clause is an exemption to the Cancellation Clause.

Evidence of Insurability: If applicable, the **Contractor** shall obtain the relevant insurance, including workers' compensation, and optionally automobile insurance medical malpractice, and general liability as applicable or as required by State or federal law, and shall provide evidence of insurability from the insurance carrier prior to commencement of any work in connection with the Contract. The **Contractor** shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide **OCCY** with evidence of such insurance and renewals. Such policy shall require 30 days advance notice of cancellation be provided to **OCCY**.

If the **Contractor** is an individual, does not have employees, and does not carry workers' compensation insurance because it considers the business to be that of an independent **Contractor** as defined by the Workers Compensation Act (Title 85 O.S. §1 et. seq.), and not that of an employee, the **Contractor** must complete an Affidavit of Independent **Contractor** Status.

Expense Reports: A properly completed Expenditure Report form must be submitted quarterly to **OCCY** by email at MDTOffice@OCCY.ok.gov and received no later than the 15th of the month following the quarter. If the FSMDT has no expenses for the quarter, then the **Contractor** must submit an Expenditure Report form indicating no expenses were incurred for that quarter. The reporting periods are Quarter 1 – January, February, March; Quarter 2 – April, May, June; Quarter 3 – July, August, September; and Quarter 4 – October, November, December. Supporting documentation for all expenses must be maintained by the Contractor and provided within two weeks if requested by **OCCY**.

Using the same cost principles applicable to federal funds as provided for at 2 CFR Part 200, **Contractor** assures that all expenditures will be supported by documentation including, but not limited to, copies of paid invoices, payroll records and time reports. The **Contractor** further assures that all billings will be based on actual costs incurred and paid. If the **Contractor** is unable to support any part of an expenditure and it is determined that such inability is attributed to misrepresentation of fact or fraud on the part of the **Contractor** or the expense is disallowable, the **Contractor** shall be liable to **OCCY** for an amount equal to such unsupported part of the expenditure in addition to all costs, including legal, attributable to the reviewing and discovery of paid part of claim. Liability under this paragraph shall be determined within two-years of the discovery of such misrepresentation of fact or fraud by the **Contractor**.

Failure to Comply: The **Contractor** shall be subject to all applicable State and federal laws, rules and regulations, and all amendments thereto. Compliance with the requirements shall be the responsibility of the **Contractor**, without reliance on or direction by **OCCY**.

False Claims Act: The **Contractor** shall promptly notify **OCCY** of any credible evidence that a principal, employee, agent, Subcontractor, or other person has submitted a false claim under the False Claims Act or has committed a criminal or civil violation of laws pertaining to fraud, conflict of interest, bribery, gratuity, or similar misconduct.

Failure to Enforce: Failure by the State of Oklahoma at any time to enforce the provisions of this contract shall not be construed as a waiver of any such provisions or of the State's right to do so in the future. Such failure to enforce shall not affect the validity of this contract or any part thereof or the State of Oklahoma right to enforce any provisions at any time in accordance with its terms. Further, the State's selection of one remedy at law or in equity shall not be deemed an election of remedies and the State shall maintain all rights and remedies provided herein.

Food Items: In accordance with OMES, purchase of food and drink items used as food and refreshments and required in connection with meetings (i.e., 10A O.S. § 1-9-102, 135:10-25-5, and "MDT Minimum Standards") or similar type activities held/conducted for and in the interest of the general public, shall be considered a valid operating expense to the extent that such purchases serve a public purpose. This also includes service items, such as disposable plates/flatware, stirrers, coffee cream, sweeteners, etc.

"A *public purpose*" as used in this policy shall mean activities or functions conducted/held in the interest of the general public at large. The general public at large may include business guests of the agency."

The maximum expenditure amount per month for food, not including service items, is \$120.00.

Force Majeure: The **Contractor** shall not be liable for any damages resulting from any delay in delivery or failure to give notice to delay that directly or indirectly results from the elements, act of God, delays in transportation, or delays in delivery by any cause beyond the reasonable control of the **Contractor**.

Mandatory Requirements: The use of the terms "shall," "must," or "will" (except to indicate simple futurity) in this contract indicate a mandatory requirement or condition. The word "should" or "may" in this contract indicates desirable attributes of conditions and are permissive in nature.

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Oklahoma Taxpayer and Citizen Protection Act of 2007: The **Contractor** certifies that it and all proposed Subcontractors whether known or unknown at the time this contract is executed or awarded are in compliance with Title 25 O.S. §1312 and includes, but is not limited to, the free Employment Verification Program available at www.dhs.gov/E-Verify.

Procurement Integrity: The **Contractor** certifies they have not entered into this contract with this or any other Oklahoma State agency that would result in a substantial duplication of the services of duplication of the end product rendered by the **Contractor** or its employees.

Statement of Responsibility and Liability: The parties intend that each shall be responsible for its own intentional and negligent acts or omissions to act. **OCCY** shall be responsible for the acts and omissions to act of its officers and employees while acting within the scope of their employment according to the Oklahoma Governmental Tort Claims Act. The **Contractor** shall be responsible for any damages or personal injury caused by the negligent acts or omissions to act by its officers, employees, or agents acting within the scope of their authority or employment.

The **Contractor** agrees to hold harmless **OCCY** of any claims, demands liabilities resulting from any act or omission on the part of the **Contractor** and/or its agents, servants, and employees in the performance of this contract. It is the express intention of the parties hereto that this contract shall not be construed as, or given the effect of, creating a joint venture partnership or affiliation or association that would otherwise render the parties liable as partners, agents, employer-employee or otherwise create any joint and several liability.

Travel and Related Expenses: Reimbursement of travel expenses to the FSMDT is set by the FSMDT's written policy and should be available upon request. Travel expenses incurred by the FSMDT pursuant to this contract shall be included in the total amount of the contract award and will be limited to the current General Service Administration (GSA) rates or the Oklahoma State Travel Reimbursement Act, as applicable.

Vendor Payment System: As a recipient of funds issued from a State of Oklahoma government agency, **Contractor** information is maintained in the State of Oklahoma PeopleSoft Vendor Payment System. All payments issued by Oklahoma state agencies are subject to state law (Title 62, Section 34.64) requiring that "Payments disbursed from the State Treasury shall be conveyed solely through an electronic payment mechanism." To comply with the law, the Treasury must collect the information necessary to pay all individuals and companies electronically.

Whistleblower Protection Act: The parties acknowledge and agree the Pilot Program for Enhancement of **Contractor** Employee Whistleblower Protections, 41 U.S.C. §4712, may apply to this contract or grant and that no employee of a **Contractor**, Subcontractor, or grantee may be discharged, demoted, or otherwise discriminated against as a reprisal for disclosing to a person or public body enumerated in said section when that employee reasonably believes evidence exists of gross mismanagement of a Federal contract or grant, a gross waste of Federal funds, an abuse or authority relating to a Federal contract or grant, a substantial and specific danger to public health or safety or a violation of law, rule or regulation related to a Federal contract.

APPROVED:

Representing the OCCY as legal signatory

Brittany Gassner
Program Manager, FSMDT Department

Date

APPROVED:

Representing Contractor as legal signatory

Printed Name: *Rebecca Porter*
Title: *Executive Director*
10/26/2023

Date

**CONTRACT FOR CHILD ABUSE MULTIDISCIPLINARY TEAM ACCOUNT FUNDING
CALENDAR FISCAL YEAR 2024**

This contract is entered into between the **Oklahoma Commission on Children and Youth**, hereinafter referred to as **OCCY**, by virtue of the authority vested in it by Title 74 O.S. §85.1, and **LIFT Community Action Agency**, hereinafter referred to as **Contractor**.

The **Contractor**, otherwise known as the "lead agency" in Title 10A O.S. §1-9-102 A(2), shall be chosen by the members of the Freestanding Multidisciplinary Team (FSMDT) for **Pushmataha County(ies)** and considered to be a "sole source" for the purpose of contracting. The **Contractor** acts on behalf of and at the direction of the FSMDT. The FSMDT directs the budget, expenses, and activities of the FSMDT in accordance with a Memorandum of Understanding (MOU) between the **Contractor** and the FSMDT or a subcontract between two legal entities. The **Contractor** must provide for the purposes of this contract an Office of Management and Enterprise Services (OMES) Vendor/Payee Form and a Form W-9.

All terms and conditions herein become the contract between the **OCCY** and the **Contractor**. The **Contractor** agrees to comply with all of these terms and conditions. The **Contractor** understands and agrees that when any term and/or condition contained within this contract is or becomes applicable to the **Contractor's** officers and/or employees (collectively, "organization"), the **Contractor** agrees to ensure that its organization abides by the terms and/or conditions applicable to the organization.

Contact Persons: For the purposes of this contract, the following are the appropriate persons with all contacts should be directed.

- **Contractor: Rebecca Reynolds / 580-326-3351 / becky-reynolds@liftca.org**
- **OCCY: Brittany Gassner, FSMDT Program Manager / (405) 606-4919 / Brittany.Gassner@OCCY.ok.gov**

Contract Funding: In accordance with Title 10 O.S. §1-9-102, **OCCY** may disburse the contracted amount at the beginning of the calendar year to the **Contractor** on behalf of the FSMDT upon the FSMDT satisfactorily being recognized by **OCCY** as a functioning FSMDT (see OAC 135:10-25-1 through 10-25-8). The maximum total of this contract is **\$ 35,916.71** for the period of January 1, 2024, through December 31, 2024. This contract shall not take effect and no funds may be disbursed until **OCCY** has in its possession the contract containing original signatures of both parties and a purchase order has been issued by OMES or another approved State agency.

The FSMDT will not be allowed to carryover or lapse funds of this contract period. Any funds not expended by the FSMDT by the end of this contract period shall be returned to **OCCY** no later than January 31st of the next year for deposit in the Child Abuse Multidisciplinary Account.

Contractor's Relationship to OCCY: The **Contractor** is in all respects an independent **Contractor** and is neither an agent nor an employee of the **OCCY**. Neither the **Contractor** nor its organization shall have authority to bind the **OCCY** nor are they entitled to any of the benefits or worker's compensation provided by the **OCCY** to its employees. In the event the independent **Contractor** relationship ends in any manner, this contract shall automatically terminate without notice. The **Contractor** shall immediately notify the **OCCY** Contract Monitor of the change in the relationship.

Duties of the Contractor (unless otherwise assigned or delegated by the FSMDT): The **Contractor** shall

- Comply with Oklahoma Statutes (Title 10A O.S. §1-9-102 et. seq.) and Rules (Title 135:1025-1 et. seq.) that may be applicable to the **Contractor**.
- Complete and provide with this contract the OMES Vendor/Payee Form (and if not previously completed, then the Electronic Funds Transfer Enrollment Request Form), OMES Non-Collusion Form (Form CP 004), Internal Revenue Service W-9.
- Provide with this contract the Budget Request Form and the Budget Narrative Form as completed by the FSMDT and initialed by the FSMDT Coordinator and described in the General Terms and Conditions – Allowable Expenses section of this contract. If the FSMDT lists any budget request for the category "Contractual / Sub-Contractual", then the **Contractor** shall also provide copies of contracts, professional service agreements, and/or Memorandums of Understanding (MOU) between the FSMDT and any entity that provides service(s) in the budget narrative. "Contractual / Sub-Contractual".
- Collaborate with the FSMDT to develop and sign a contract, professional service agreement, or MOU that establishes the relationship between the **Contractor** and the FSMDT and describes the duties to be performed by the **Contractor**, especially as the fiduciary agency, and, if applicable, in which the FSMDT agrees to pay the **Contractor** for their services.

- If applicable, provide a copy of any contracts, professional service agreements, and MOUs no later than 30 days after the agreement is entered.
- Submit to **OCCY** the Quarterly Expenditure Report form monthly, no later than the 15th of the month following the reporting quarter, documenting expenses. The **Contractor** agrees to maintain all supporting documentation of those expenses and, if requested by **OCCY**, provide those documents within two weeks of the request.

Duties of OCCY: The **OCCY** shall

- Complete and submit to OMES the Sole Source form (Form CP 002) regarding the Contractor.
- Notify the **Contractor** by the end of September of the contract year the FSMDT annual status that determines if the team receives funding for the forthcoming fiscal year.
- Initiate the funding disbursement process with OMES so funds can be disbursed to the **Contractor** on behalf of the FSMDT in a timely manner (typically January of the contract year).
- Promptly review quarterly expenditure reports submitted by the **Contractor** on behalf of the FSMDT and request supporting documentation of expenses at communicate with the **Contractor** any concerns regarding unallowable expenses.
- Complete random detailed reviews of supporting documentation of submitted quarterly reports to assure that team expenses are aligned with the FSMDT's approved budget, directly related to the FSMDT purpose, and reasonable in nature.
- Initiate process for **Contractor** to return to **OCCY** any Child Abuse Multidisciplinary Team Account funds not expended by the FSMDT by the end of the contract period.

GENERAL TERMS AND CONDITIONS

Access to Records Requirements: As used in this clause, records includes books, documents, accounting procedures and practices, and other data regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any contract with **OCCY**, the **Contractor** agrees that any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant contract.

The **Contractor** is required to retain records relative to the contract for the duration of the contract and for a period of seven years following completion and/or termination of the contract. If an audit, litigation, or other action involving such records is started before the end of the seven year period, the records are required to be maintained for two years from the date that all issues arising out of the action are resolved or until the end of the seven year retention period, whichever is later.

OCCY may request supporting documentation to validate any payments made on behalf of the FSMDT. Upon request from **OCCY**, the **Contractor** shall permit any representative of the State, **OCCY**, or other authorized agency with jurisdiction to conduct a site visit and inspect and audit the books and records of the **Contractor** related to the services and/or items purchased.

Allowable Expenses: All expenses must be directly related to the purpose of the FSMDT, be reasonable in cost, and included in a budget narrative approved by **OCCY**. The projected expenses should be included in a line-item budget within the following categories. The **Contractor** may want to refer to federal guidelines 2 CFR Part 200 for federal guidance on allowable expenditures.

- | | | |
|------------|----------------|---------|
| • Training | • Equipment | • Other |
| • Travel | • Subcontracts | |
| • Supplies | • Personnel | |

Amendments, Unavailability or Redirection of Funding, and Cancellation: All modifications or amendments to this contract shall be in writing, dated and executed by both the **Contractor** and the **OCCY**. Unless the contract is amended or canceled, the contract shall be in force until the expiration date. In the event State, federal, or other funds used to support this contract become unavailable, either in full or in part, the **OCCY** may terminate or reduce the contract upon notice in writing to the **Contractor** by certified mail. In addition, this contract may be canceled without cause 30 days after written notice has been given by either party of its desire to cancel without cause. Notification of cancellation shall be by certified mail to the business address of record. In the event this contract is canceled by either party, the **Contractor** shall be responsible for reimbursement to **OCCY** within 45 days of cancellation the any remaining CAMTA funds allotted to the team for the fiscal year of this contract. In the event this contract is canceled under this section, the **Contractor** agrees to take all reasonable steps to minimize termination costs. The **Contractor** agrees to submit to **OCCY** any outstanding

expenditure reports and supporting documentation within 30 days of cancellation so that a final remaining balance can be confirmed by OCCY

Applicable Law: The validity, construction, and enforcement of this contract and all disputes that may arise in connection with its performance shall be governed by the laws of the State of Oklahoma without regard to its choice of law provisions. Any legal action relating in any manner to the subject matter of this contract shall be filed in a court of competent jurisdiction in the State of Oklahoma to which jurisdiction and venue the parties hereby expressly agree.

Assignment and Delegation: If the **Contractor** cannot perform the services as identified in this contract, in whole or in part, the **Contractor** will be responsible for subcontracting for the services. Subcontractors must comply with all applicable General Terms and Conditions included in this contract. All subcontracts must be provided to the **OCCY** no later than 30 days after the agreement is entered. Subcontracting of the services shall not relieve the **Contractor** of any responsibility for performance under this contract.

Audit / Availability of Records: If applicable, the **Contractor** must have a recent independent audit completed in accordance with Government Auditing Standards and 2 CFR Part 200. A certified public accountant or public accountant who has a valid and current permit to practice accountancy must perform the audit. **OCCY** retains the right to examine the work papers of said auditor. The **Contractor** must have available to **OCCY** a copy of the most recent completed annual audit along with a response to any audit findings and a copy of any management letter received within 120 calendar days of the conclusion of the contract period (i.e., March 31) to **OCCY**.

At the request of **OCCY** or the Office of the Oklahoma State Auditor and Inspector, the **Contractor** will provide books, records, documents, accounting procedures, practices, or any other item relevant to the contract for examination.

Budget Modification: The **Contractor**, at the request of the FSMDT, may modify its budget once a calendar month by transferring up to 10% of the total budget amount between categories within its budget. Transfer between categories of an amount greater than 10% of the total budget must have prior written approval from **OCCY** (an email is acceptable). The **Contractor** must submit to **OCCY** the Budget Modification form to document all modifications and no later than the end of the month in which the modification is made or requested. No modifications to the budget can be made after November 30 of the contract period.

Certification Regarding Debarment, Suspension, Proposed for Debarment, or Declared

Ineligible for Award of Contracts by any Federal or State Agency: By signing the contract, the **Contractor** attests and assures that no employee or any of its principals, including Subcontractors, performing hereunder:

- Are presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any federal agency;
- Have, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for commission or fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract; violation of federal or State antitrust statutes relating to the submission of offers; or, commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;
- Have, within a three-year period preceding this offer, had one or more contracts terminated for default by any federal, State, or local entity; nor,
- Are presently indicted for, or otherwise criminally indicted, or charged by a governmental entity with any of the offenses enumerated above in this section.

Confidential Information: If the **Contractor** has access to any confidential information relevant to the FSMDT, then the **Contractor** agrees to comply with all federal and State privacy laws and regulations, and the FSMDT confidentiality agreement.

Construction Costs: CAMTA funds shall not be used for construction purposes.

Contract Monitoring Plan: As a **Contractor** with the **OCCY**, this contract will be monitored to ensure compliance with the Duties, Terms, and/or Conditions outlined in this contract. Typical monitoring activities may include site visits, review of contractually required deliverables, review of expenditures and supporting documentation, and verification of licensure and/or insurance required and other monitoring activities.

The OCCY Contract Monitor for this contract is Brittany Gassner, Programs Manager, Freestanding Multidisciplinary Teams, 2915 N. Classen Blvd, Suite 300, Oklahoma City, OK 73106; (405) 606-4919; Brittany.Gassner@OCCY.ok.gov.

Disallowable Claims: If any cost items claimed by the **Contractor** on behalf of the FSMDT are subsequently disallowed by the **OCCY** with reason, the **Contractor** shall repay the **OCCY** the amount of any such disallowed items.

Entire Agreement: This contract, including referenced attachments, represents all of the terms and conditions agreed upon by the parties. No other understandings or representations, oral or otherwise, regarding the subject matter of this contract shall be deemed to exist or to bind any of the parties hereto.

Equal Opportunity and Discrimination: The **Contractor** agrees to comply with all federal and state laws prohibiting discrimination and assures services will be provided without distinction on the basis of race, sex, color, national origin, or disability and no other distinction will be made on the bases of age, except as the law allows.

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The **Contractor** agrees to hold harmless **OCCY** of any claims, demands liabilities resulting from any act or omission on the part of the **Contractor** and/or its agents, servants, and employees in the performance of this contract. It is the express intention of the parties hereto that this contract shall not be construed as, or given the effect of, creating a joint venture partnership or affiliation or association that would otherwise render the parties liable as partners, agents, employer-employee or otherwise create any joint and several liability.

Travel and Related Expenses: Reimbursement of travel expenses to the FSMDT is set by the FSMDT's written policy and should be available upon request. Travel expenses incurred by the FSMDT pursuant to this contract shall be included in the total amount of the contract award and will be limited to the current General Service Administration (GSA) rates or the Oklahoma State Travel Reimbursement Act, as applicable.

Vendor Payment System: As a recipient of funds issued from a State of Oklahoma government agency, **Contractor** information is maintained in the State of Oklahoma PeopleSoft Vendor Payment System. All payments issued by Oklahoma state agencies are subject to state law (Title 62, Section 34.64) requiring that "Payments disbursed from the State Treasury shall be conveyed solely through an electronic payment mechanism." To comply with the law, the Treasury must collect the information necessary to pay all individuals and companies electronically.

Whistleblower Protection Act: The parties acknowledge and agree the Pilot Program for Enhancement of **Contractor** Employee Whistleblower Protections, 41 U.S.C. §4712, may apply to this contract or grant and that no employee of a **Contractor**, Subcontractor, or grantee may be discharged, demoted, or otherwise discriminated against as a reprisal for disclosing to a person or public body enumerated in said section when that employee reasonably believes evidence exists of gross mismanagement of a Federal contract or grant, a gross waste of Federal funds, an abuse or authority relating to a Federal contract or grant, a substantial and specific danger to public health or safety or a violation of law, rule or regulation related to a Federal contract.

APPROVED:

Representing the OCCY as legal signatory

Brittany Gassner
Program Manager, FSMDT Department

Date

APPROVED:

Representing Contractor as legal signatory

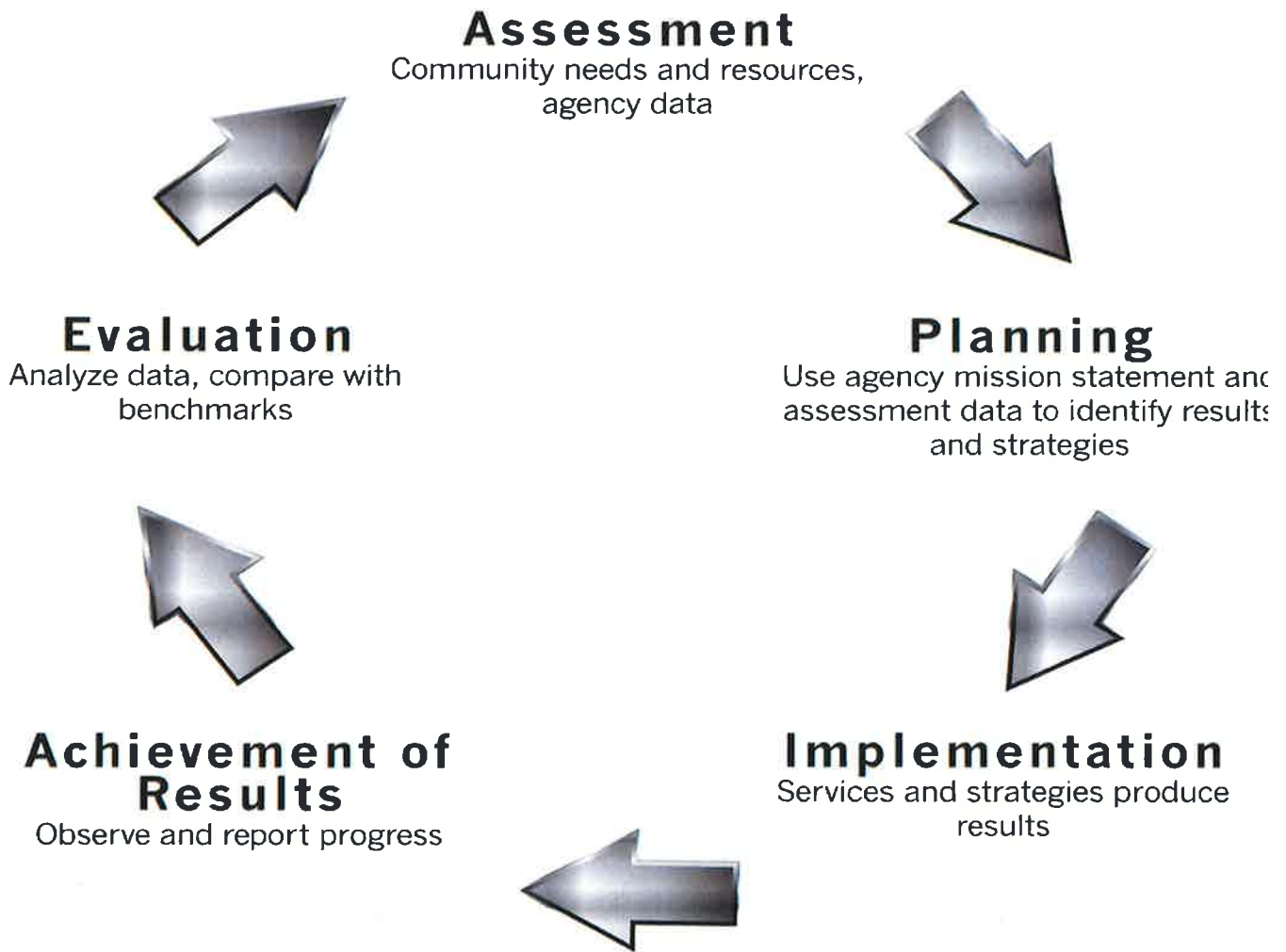
Printed Name: Rebecca Porter
Title: Executive Director

Date

R. Porter

10/26/2023

Accountability Cycle



ROMA Cycle was created by the National Peer-to-Peer ROMA Training and Certification Project

2023 ROMA Plan

LIFT Community Action Agency, Inc.

Date: 2/3/2023

ROMA Cycle	ROMA Action Item	Participant Manual Module	2023 Target Completion Date	Person(s) Responsible
Assessment	Review/revise current MISSION statement	2, Part 1	5/9/2023	Board; ED; AD's; Prog Dir & Staff; ROMA Coord
	Review last community NEEDS assessment to determine priority needs, Ensure that needs identified are properly labeled as family, agency, and community levels	2, Part 2	03/14/2023 and 12/12/23	Exec. Dir; Staff; P.D.'s; Board; ROMA Coord.; Community Members Focus Groups
	Evaluate the available resources in your community to address any service gaps or find collaborators	2, Part 2	01/01/2023 and ongoing	Exec. Dir; Staff; P.D.'s; Board; ROMA Coord.; Community Members Focus Groups
	Evaluate current program services and determine effectiveness to meet needs (based on recent program performance).	2, Part 2	03/14/2023 and ongoing	Exec. Dir; Staff; P.D.'s; Board; ROMA Coord.; Community Members Focus Groups
Planning	For the top 3-5 needs identified in your most recent CNA, develop a logic model. Fill in as you complete the ROMA action items. Once your planning logic models are completed, submit with your Community Action Plan.	7	01/25/2023-02/28/2023	Planning Director; CSBG Admin/ROMA Coordinator
	Based on needs and program evaluation, identified during the assessment process, plan your measurable OUTCOMES to be achieved to meet the needs that are linked to the 6 NPI's.	3, Part 1	02/09/2023-Planning Logic Models w/ CAP; 9/30/23-10/30/23- Review outcomes; 11/14/23-12/12/23/23- Report to Board	Board; Agency Leadership; Staff; Focus groups; Planning Director; CSBG Admin/ROMA Coordinator
	Identify SERVICES and strategies to achieve outcome(s).	3, Part 2	01/01/2023 and ongoing	Exec. Dir; Staff; P.D.'s; Board; ROMA Coord.; Community Members Focus Groups
	Determine OUTCOME INDICATORS	4	01/25/23-02/28/2023 Logic Models Created which identify outcome indicators	Leadership; Program Staff; Planning Dept.
	Determine your projected success rates for each outcome indicator.	5	10/01/23-11/30/23 Review/Analysis of Annual Report targets to identify Success	ROMA Coordinator in collaboration with Leadership and Program Staff
	Develop a system to track services and outcomes. Determine what documentation will be collected to measure each outcome, staff responsible and how often data will be collected. (MEASUREMENT, DATA, and FREQUENCY)	5	01/01/2023-12/31/2023 Monthly Data Collection and Program Reports shared with Program Directors	CSBG Admin/ROMA Coordinator
	Update Community Action Plan to include outcomes, strategies and specific data collection information.	3, Part 1	01/25/2023-02/28/2023 Submitted w/ CSBG FY23 Application	Planning Director; CSBG Admin/ROMA Coordinator

Implementation	Implement revised Community Action Plan	4	01/01/2023-12/31/2023	All Program Staff and Leadership
	Determine frequency to monitor implementation of plan.	4	Quarterly 04/23; 07/23; 10/23 and 12/23	Planning Department and Leadership; Program Directors; CSBG Admin/ROMA Coordinator
	Determine the frequency for evaluating progress and report results to board.	4	Quarterly 04/23; 07/23; 10/23 and 12/23	Planning Department and Leadership; Program Directors; CSBG Admin/ROMA Coordinator
Achievement of Results	Measure your actual RESULTS for each outcome	5	02/23; 06/23; 09/23; 12/23	CSBG Admin/ROMA Coordinator
	Update your planning logic models with the actual results, then resubmit to ODOC.	7	02/2024 to be submitted w FY24 CSBG Application	Planning Department PCSBG Admin/ROMA Coordinator collaborating w Program staff
	Analyze data; compare with performance targets/projected success rates determined during the planning phase.	5	11/01/23-12/31/23 Review Module 4 targets against Actual	CSBG Admin/ROMA Coordinator; Planning Director
Evaluation	Adjust performance goals as needed as evidenced by actual performance. Continue strategies that achieve desired performance goals. Revise or discontinue strategies that do not achieve desired performance.	5	07/01/2023 Midyear review of performance to actual (PMO, Logic Models, Module 4 Targets)	Program Staff and ROMA Coordinator with input from leadership
	Update Community Action Plan.	4	02/01/2023-02/28/2023 during CSBG app process	Planning Dept; Leadership; Staff; Board
	Submit CSBG IS report.		Feb-23	CSBG Administrator/ROMA Coordinator
	Reevaluate the community needs assessment process make changes (if needed) to ensure that later assessments follow the ROMA framework and guidelines	2, Part 2	11/2023(review and discuss process i.e. surveys; focus groups; community groups)	Planning Department; Leadership; Program staff
	Review the demographics of the population served. Identify if they have received single services, multiple services, or bundled services. Consider the connections among people, services, and outcomes.		01/01/23-12/31/23; CSS Quarterly; Monthly reviews by data entry staff and applicable P.D.s	CSBG Admin/CAPTAIN Data Entry Staff/ Program Staff

ODOC Form Revision Date - 11/04/2019

****Remember that the ROMA cycle is a on-going cyclical process.****

This form is to help you ensure ROMA Implementation within your agency.
As changes are made to the target dates, an updated ROMA Plan should be submitted to your liaison.

The Results Oriented Management and

2023 Community Action Plan (January thru December 2023)

LIFT (Lifting Individuals For Tomorrow) Community Action Agency, Inc.

Purpose:

- The CSBG Act 42 U.S.C. § 9908: US Code – Section 9908 Application and plan requires “an 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 services block grant made under this chapter for a program, a Community Action Plan (CAP) that includes a community-needs assessment for the community served, which may be coordinated with community- needs assessments conducted for other programs”
- The Community Action Plan (CAP) is outcome focused and describes the community-wide approach the agency will take when making decisions on the anti-poverty programs it will administer. The CAP should tie directly to the agency’s most recent Community Needs Assessment, and document the full use of the ROMA cycle. (Organizational Standards 4.2 and 4.3)
- The CAP is a required, foundational element for CSBG funds and is a roadmap for implementing community changes – the CAP provides the focus and identifies the what, the who, and the how of these changes. The CAP notes the specific strategies and outcomes to show success.
- The CAP is the annual operation plan for the strategic plan (which is usually 3-5 years), and gets into more of the nuts and bolts of how the agency will actually achieve the goals set in the strategic plan. It should include everything that the agency plans to do – whether or not it is directly funded by CSBG. The CAP must, at a minimum, address all questions included within this template, but the agency may also include additional information as needed to make it an operation plan that is useful to the agency.

Executive Summary: The purpose of this plan is to serve as a guide over the next 12 months for ensuring that the work of LIFT Community Action Agency, Inc. (LCAA) aligns with the CSBG Act as well as the communities needs as identified in the most recent 2022-2024 Community Needs Assessment and the 2023-2025 Strategic Plan.

LCAA’s mission is: *“To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.”*

The goal will be to focus resources towards achievement of outcomes identified in the C.N.A. report, Strategic Plan, Performance Management Outcomes excel workbooks and the FY23 logic models (all included as uploads). The logic models are representative of the communities’ top three prioritized needs-Housing, Substance Abuse Services and Community and Economic Development. Additionally, the CAP and Logic Models address the Agency need to increase organizational capacity.

LCAA staff and Board will utilize existing resources and seek/secure additional resources in order to achieve the stated goals/objectives/outcomes. The CSBG Administrator - ROMA coordinator will produce reports which will be shared with program staff on a monthly basis. These reports will help in evaluation of program services, identification of success rates and what, if any, revisions, are needed. Reports will also be shared with management, the Board of Directors and other Stakeholders no less than annually. Some reports such as Customer Satisfaction will be shared quarterly with the Board and uploaded as part of the CONFAX and/or within CAPTAIN (as applicable/required) to the Oklahoma Department of Commerce

LIFT (Lifting Individuals for Tomorrow) Community Action Agency, Inc. was founded in 1968 when three local Community Action Agencies merged in order to better meet the needs of families with low incomes who resided in any one of the three very rural and poverty-stricken Southeast Oklahoma Counties. LCAA's primary service area includes Choctaw, McCurtain and Pushmataha Counties, a land area of over 4000 square miles with a population of 56,006 which represents a decrease of 2945 individuals since the 2010 Census (U.S. Census Bureau American Community Survey QuickFacts Population estimates July 1, 2021). About one in five individuals in the service area are living below the Federal Poverty Limits. This same source (U.S. Census July 1, 2021 Quickfacts) reflects that 10,881 individuals or 19.43% of the population lives below federal poverty income guidelines. This represents a decrease from 2019 estimates which reflected 21.95% living below poverty. This needs further analysis as there was also a decrease in overall population. The agency, headquartered in Hugo, Oklahoma (Choctaw County) provides a wide array of services ranging from education, housing, social services, and emergency services to transportation and more all aimed at alleviating the conditions of poverty. LCAA is one of the top ten employers in the tri-county area with 242 full time staff and 29 part time staff as of December 31, 2022. The agency's annual budget is approximately \$24 million (FY23 Board approved agency budget) and supports about 20 separate programs. In August of 2021, the Board formally approved the long-awaited name change from Little Dixie CAA to LIFT Community Action Agency, Inc. The new name better reflects the growth and direction of the agency.

The CAP represents, in large part, an extrapolation of data from recent and relevant agency and community-developed documents which includes the 2023-2025 Strategic Plan; 2022-2024 Community Needs Assessment Report; 2022 Customer Satisfaction Data; and analyzed data from CAPTAIN and other program-tracking databases. The data contained within these documents represent actual client counts and demographics, survey responses, and summaries from community and focus group discussions, etc. Therefore, the CAP includes both quantitative and qualitative data. Some sections of the Community Needs Assessment report (approved by the Board of Directors on January 11, 2022) include qualitative data derived from interviews with Board members, service providers, residents, and staff. As part of the Strategic Planning process, the Community Needs Assessment Report was a resource that was used at length. The FY2023-2025 Strategic Plan and FY23 CAP for will not have a focus on the COVID-19 "need" from the C.N.A. as the need was no longer prioritized and the resources to address this former need have (CARES funding) have been exhausted.

Stakeholders involved in the process of developing these documents included residents, staff, Board, other service providers, partners, and funders. The “key findings” that came out of these activities can be found throughout this 2023 Community Action Plan. LCAA’s 2023 CAP will be presented to the Board as a training and will be open for discussion during the regularly scheduled board meeting to be held March 14, 2023.

The process, as described in the previous section, addresses CSBG mandates, the Organizational Standards and ROMA framework inasmuch as it identifies development of the CAP by the overall community. The CAP was developed from the various documents developed at the community level, by representatives of each required community sector. This plan is outcome-focused and identifies needs as well as the type/level of need and strategies for how the agency will address these needs over the next 12 months. Each component is mission-focused and was developed as a collaboration of staff, customers, board and other stakeholders.

LCAA’s mission statement *“To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency”* is the driver for all decisions and subsequent actions by representatives of the agency. The mission statement was approved by the Board in February of 2016 initially. It is reviewed as required by the Organizational Standards and was last revisited during the October 11, 2022 Board of Director’s meeting. The Board members each reviewed the Mission Statement and concluded it met with the criteria as set forth in the CSBG regulations/guidance. The bulk of programs/services provided by the agency are targeted to families of low-income. Most services require individuals/families meet low-income guidelines as an eligibility requirement. LCAA is first and foremost, a Community Action Agency. Therefore, the very identity of the agency is founded in addressing causes and conditions of poverty.

LCAA’s Local Theory of Change aligns with the National Theory of Change and the three National Goals. The agency’s mission statement *“To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency”* makes the following assumptions:

- 1) We can improve lives;
- 2) We can help individuals and families become self-sufficient;
- 3) We need to collaborate with others to achieve the change.

LCAA believes that our services and the strategies we employ reflect the community’s needs and will lead to improved lives for our local residents. LCAA utilizes the community needs assessment, the strategic plan, information from program-specific reports, conversations with front-line staff, management, board members and customers to determine how best to meet the community’s needs. This theory of change is reflected in the programs and services provided by the agency. The agency pursues resources (funding, volunteers, etc.) that would serve to address community-identified needs, all of which align with the National goals.

Assessment

The community assessed represents LCAA's service area which includes Choctaw, McCurtain and Pushmataha counties. Collectively, these three rural Southeast Oklahoma counties have an average poverty rate of 21.95 percent (U.S. Census Bureau; 2019 Poverty estimates). The population density is about 14.69 persons per square mile compared to the State's density of 57.3 persons per square mile. At the time of the assessment, about 65 percent of the population was white; 7.31 percent black; 10.6 percent multiple races; 13.9% Native American with the remaining representing other races. Gender makeup is 51.64% female and 48.36% male. According to the U.S. Census ACS 2019 estimates, the combined population was 58,951. The population remained steady over the past three years since the last community needs assessment conducted in late 2019 early 2021. However, over the past decade (since the 2010 Census) the population has decreased across each county. This area as described represents LCAA's service area which represents the community assessed for the most current Community Needs Assessment for January 1, 2022 through December 31, 2024.

The community needs assessment process began with collection of needs surveys. LCAA utilized the Oklahoma Standardized Needs Assessment Survey for data collection. Blank surveys were printed, collected and then input into the CapSystems online survey collection/analysis tool by the CSBG Administrator/ROMA Coordinator. Paper surveys were distributed throughout the service area using various outlets. They were emailed to all staff and were distributed to members of the Board of Directors. Paper copies were sent home with all Head Start and Early Head Start children, Healthy Start participants, and all Retired and Senior Volunteer Program (RSVP) volunteers. Agency staff distributed and collected completed surveys from area schools, faith-based organizations (Churches), civic groups, County Coalition members (which include representation from all community sectors), and more. Additionally, the survey was promoted through signage and social media outlets.

The survey contained a question for respondents to self-identify which sector best described them. The available options included: Client of the Agency, Agency Board Member, Agency Volunteer, Representative of an Educational Institution, Representative of a Government Entity; Representative of a Private Organization; Representative of a Faith-Based Organization; Representative of a Community Based Organization; or General Public (someone having not received services from the agency). Surveys were completed and received from all sectors listed. A total of 506 surveys were collected and entered into the survey feature within CapSystems. This database then generated the top needs ranked in ascending order for the top 10 identified needs. The top ten needs were shared with focus groups which included; leadership, front-line staff and board members to prioritize the needs to the top three. During the prioritization activity, focus group participants were asked to provide "rationale" or qualitative data as to why they selected and ranked/prioritized the three needs chosen. Counts were conducted on each respondents completed surveys and the need referenced most was identified as the number one prioritized need and this process was used to identify the top three.

Once needs had been prioritized, LIFT Community Action Agency conducted six community meetings (two per county in each county within the service area) in order to gain additional input from residents, local services providers, staff, board, and other stakeholders on the prioritized needs and resources within the service area. These meetings were also advertised via email, newspaper advertisements, posters, and through social media outlets. Meeting participants engaged in activities of identifying causes/conditions of poverty, existing resources, gaps in resources, and potential strategies for addressing each of the three needs. All of this data was collected and utilized to develop the 2022-2024 (January 1, 2022 through December 31, 2024) Community Needs Assessment Report, which represents one of the documents used to develop this FY23 Community Action Plan. It should be noted that an environmental scan was completed during the last quarter of 2022 for help with developing the new three year strategic plan. As a result of that scan, the COVID-19 related need is not a focus of FY23. It was not removed as a need from the C.N.A. and is still within the emergency needs section (Prioritized Need 4). The FY23 CAP and Planning Logic Models also reflect minor variances relevant to the strategies to address needs.

In addition, customer satisfaction surveys are a tool used for developing the CAP and in decision making for agency programs/services. Customer satisfaction surveys are available on the agency website and paper copies are located/available at each LCAA office location. Customers are asked to complete a survey upon receipt of services, preferably at that point in time. However, to facilitate participation and remove any potential barriers, customers are informed of the online survey tool and assured that their responses are completely anonymous and cannot have any impact on their eligibility for receipt of services.

Customer Satisfaction survey responses are entered into an online database and reports are provided to the board on a quarterly basis. Survey responses, when and where deemed necessary are shared immediately with appropriate staff. An example would be in the event a survey response revealed the need for further review and/or action. For example, if a respondent stated that staff did not seem knowledgeable of the program from which they sought services, those responses would be shared with the appropriate program director, Associate Director, and Executive Director. The information would be used to determine if additional training should occur within that department so as to ensure services were being provided as intended for that particular service. This is true across the board for all agency programs and services. The customer satisfaction survey is used as a tool to help guide the agency in decision making processes over staffing, training, services, service-delivery, etc.

A feature within the CAPTAIN software, the Service Integration Matrix (SIM) will assess if the client is eligible for other services than those originally sought. The SIM is ran internally (CAPTAIN Administrator) on every client served and follow up is conducted with clients if/when the SIM identifies client eligibility or potential eligibility for other services. Currently, LIFT C.A.A. utilizes the Service Integration Matrix (SIM) to assist with case management. The SIM allows CAPTAIN users the ability to provide the client with additional services the client may be eligible for, based on the information

reported. CAPTAIN data input staff email a computer-generated referral letter to the client. If the client is readily available, the letter can be given to them in person. This letter lists the possible services the client is eligible for and the contact information for those programs. By utilizing the SIM feature, LCAA program staff have the opportunity to educate and provide individuals/families with as many services as possible, thus improving customers chances of achieving self-sufficiency.

Other tools for assessing agency programs/services include the Strategic Plan, CAPTAIN and other program databases that provide client counts, demographics on population served, outcomes for services provided, etc. These reports help to identify what services are most utilized; who is most likely to utilize agency programs, what, if any, outcomes are being achieved, etc. This type of information helps us better understand exactly “who” our clients are, what their needs are and is critical to the decision-making process.

- Safe, decent and affordable housing units are an identified need determined by the community needs survey. This is both a family and community level need.
- Early Childhood Education to continue provision of preschool services is an identified need determined by the community needs survey. This is both a family and community level need.
- Youth Services to provide recreation and educational opportunities are a need identified by the community needs assessment as a community level need.
- Emergency services to help families pay for utilities (heating/cooling costs) are an identified need determined by the community needs survey. This is a family level need.
- Transportation for local-demand response is an identified need determined by the community needs survey. This is a community level need.
- Health Services are a need identified by the community needs survey and is both a community and family level need.
- Substance Abuse Services to provide inpatient treatment and education/awareness is an identified need determined by the community needs survey. This is a family and community level need.
- Senior Services to engage seniors to remain active are a need identified by the community needs assessment and represent both a community and family level need.
- Economic/Community Development to improve infrastructure and help families obtain assets is a need identified by the community needs assessment and represents both a family and community level need.
- Nutrition to combat obesity and address food insecurity is a need identified by the community needs assessment as both a family and community level need.
- Asset development is a need identified by the community needs assessment survey and represents a family level need

Prioritized Need 1 – Housing: Decent, safe and affordable housing units (rental and purchase) are a family level need. The agency is currently addressing this need through the provision of rental units including rental units for seniors. The agency also operates the LIFT Self-Help housing program (single family new construction) and provides

numerous other housing and housing supportive services for residents. The outcome will be that families are able to secure safe and affordable housing.

Goal: Increase housing and housing supportive services for residents in our service area.

FY23 Objective: By 12/31/23, increase availability of multifamily housing complexes owned/operated by LIFT by One additional unit. Increase number of new single family homeowners

FY23 Strategies: Construct a multifamily unit with HOME funds in Hugo, Oklahoma located in Choctaw County.

Prioritized Need 2 – Substance Abuse Services: Our community has a need for additional substance use/abuse resources and supportive services. Substance abuse services is a community level need. The agency is currently addressing this need through the Tri-County Opioid Response Implementation Project which specifically aims to address the systemic needs of the opioid epidemic. Additionally, the Choctaw County Drug Free Communities Support Program addresses tobacco/marijuana use among our youth grades 6th-12th. Through these programs, LCAA is working with community members and organizations to start informative dialogue, build partnerships and plan systemic changes to prevention, treatment, and recovery of individuals affected. The outcomes will be improved community health and reduced morbidity and mortality associated with opioid overdose and poor health outcomes from tobacco and marijuana use.

Goal: Reduce Substance Use and Abuse and improve community awareness surrounding the prevalence and risks associated with substance use/abuse

FY23 Objective: By 12/31/2023, Hold 5 community events to increase community resources and access to substance use/abuse information and services.

FY23 Strategies: Secure partnerships with local community-based organizations to collaborate and foster sharing of information relevant to substance use/abuse.

Prioritized Need 3 - Community and Economic Development : Our community has a need for community and economic development opportunities in order to improve our local economy. This is a community level need determined by the community needs assessment. Currently, LCAA provides services such as business lending, tourism/recreational activities, job training (Youthbuild and AmeriCorps) and supportive services to help individuals/families improve skills with managing their finances.

Goal: To improve our local economy and provide services/resources to help families move toward self-sufficiency.

FY23 Objective: By 12/31/2023, host 4 (four) recreational events at LIFT operated parks to boost tourism and the local economy.

FY23 Strategies: Work with local businesses and others to plan, promote and host events designed to foster interest in our local parks/lakes and other tourist attractions.

Prioritized Need 4 – Agency Capacity: Our agency has a need to increase capacity to better serve the needs of our community. This is an Agency level need determined by leadership, the Board, the community and stakeholders. Increasing organizational capacity will ensure that the organization is positioned to address the needs of families with low income, thereby helping to eradicate and alleviate poverty.

Goal: To Increase our capacity to better serve individuals and families of low-income

FY23 Objective: By 12/31/2023, agency turnover will decrease by 10% as measured by number of job vacancies compared to December 31, 2022.

FY23 Strategies: LIFT CAA will foster employee/job satisfaction via monthly appreciation, recognition and/or stress reduction events specifically for staff.

The top three needs prioritized from the community needs assessment conducted late in 2021 and subsequently approved by the Board at the January 11th, 2022 board meeting were Housing, Substance Abuse Services and Economic & Community Development. The new needs assessment reflected no change from the prior C.N.A.

This is attributed in large part to COVID and the fact that two of the three years, the agency was limited due to social distancing, etc. in trying to implement the strategies identified to address the need. The other obvious fact was that when COVID hit our communities, as with the rest of the world, needs changed across all levels to include individual, family, community and agency.

The agency strives to locate and secure resources that serve to address the community-identified needs. To that end, leadership seeks and forms partnerships, funding, and volunteers to help with addressing these needs.

The agency will continue to refer to the needs assessment as a guide for resource development and continued service delivery. The agency will work with community partners, residents, funders and others to seek out strategies for addressing community needs even if/when they differ from those that can be directly addressed through the agency (based on existing programs and capacity).

The C.N.A. includes tables with identified existing resource providers for each prioritized need. Staff will collaborate with these resource providers when possible and practical, to address the needs. Referrals to other resource providers will be made to ensure residents are tapping into all potential resources. The agency will seek to not duplicate services but to provide services and address gaps in order to meet the community identified needs.

As noted in the logic models for 2023, the prioritized needs which will be the focus for identifying and implementing strategies are: Housing, Substance Abuse Services, Economic/Community Development; and Agency Capacity Building.

Planning

In August 2022, LCAA began the process to create the new three-year (2023-2025) Strategic Plan. This process began with internal reviews and analysis of the existing 2020-2023 Strategic Plan, the current Community Needs Assessment, the 2021 and 2022 logic models, the performance measurement outcomes spreadsheet, and the Customer Satisfaction survey results from calendar year 2021. In addition, discussion and analysis occurred over program services provided as reported in CAPTAIN.

The next step in the process involved the ROMA/CAPTAIN/CSBG specialist and the Executive Director meeting with a Certified ROMA Implementer, Julia Teska. This in-person, one-day meeting occurred on September 22, 2022. The ROMA Implementer provided training, technical assistance, guidance and support over “next steps” and CSBG mandates as well as ODOC (Oklahoma Department of Commerce) guidance/rules for preparing the agency’s new three-year 2023-2025 Strategic Plan. As part of that process, numerous organizational standards and other components were reviewed and discussed.

On October 11th, 2022, the Board of Directors reviewed the 2022 Community Action Plan and the 2022 logic models which identified needs that aligned with the top three needs from the Community Needs Assessment. They also reviewed the 2020-2023 Strategic Plan and were provided updates on the success of specific strategies and progress in meeting stated goals. During this same meeting, they reviewed the agency’s Mission and Vision statements and participated in activities to determine if the existing language met with the CSBG criteria as well as the goals/objectives of the agency and the needs of the community. They voted to accept the Mission Statement with no changes.

On November 8th, 2022, LCAA’s Board of Directors engaged in strategic planning activities, including SWOT (Strength, Weaknesses, Opportunities and Threats) Analysis to provide input for the new 2023-2025 strategic plan. Through this activity and subsequent assessment activities with staff, leadership and focus groups, it was determined that the new Strategic Plan would focus on the top three needs as identified in the 2022-2024 Community Needs Assessment. The 2023-2025 Strategic Plan was submitted and approved by the Board of Directors on December 13, 2022 during the regularly scheduled Board meeting.

The strategic plan represents a long-term three-year plan used by the agency for decision making with identification of short term, intermediate and long term goals. It includes data from the 2022-2024 needs assessment and identifies the top needs to be addressed over the course of the three years. The CAP plan builds upon the Strategic plan, identifies short- term goals (needs to be addressed and the expected outcomes to be achieved) that

the agency will focus on during this fiscal year (2023). Connections between the plans are evident across the needs sections.

Community Development, although different terminology is used, is a constant across both plans. Substance abuse services, a prioritized need referenced in the CAP plan, is also addressed in the strategic plan. Both plans are very representative of the CSBG goals, mandates, organizational standards and LCAA's mission to address needs that will serve to help individuals/families on the path to self-sufficiency.

As 2021 was a new Community Needs Assessment year for LIFT CAA and the Community Needs Assessment was completed and approved in January 2022, the new Strategic Plan reflects those needs as identified for the top three. Strategies listed here in the FY2023 CAP plan are reflective of the most recent 2023-2025 Strategic Plan.

The FY22 final logic models with results are uploaded within the application in the pre-award excel workbook.

Evaluate last year's performance (2022) and determine what will be done differently this year (in 2023).

The Final Logic Models for 2022 were presented to the Board during the October 11th, 2022 Board meeting. Specific strategies identified in the logic models were discussed as well as results for each of the top three needs and the agency level need of Rebranding. They are uploaded within the excel workbook titled Pre-Award Agency Questionnaire.

The presentation of results included outcomes/goals that had been achieved up through September 30, 2022. Therefore, three months was still remaining within the year to achieve stated outcomes. Reports pulled from CAPTAIN and other tracking methods showed that outcomes had been achieved or exceeded for three of the four needs. The agency level outcome was achieved but via agency resources vs. the identified strategy and discussion regarding challenges occurred during the meeting.

The 2023 planning logic models are included within the excel workbook upload titled Pre-Award Agency Questionnaire.

LCAA utilized ODOC's Logic Model Checklist to ensure that the 2023 Logic models include clear outcomes that match the prioritized needs in the C.N.A. which are Housing, Substance Abuse, Economic/Community Development, an Agency need for Capacity Building. The planning logic models are included within the excel workbook uploaded in the application titled Pre-Award Agency Questionnaire.

The target population will be residents of Choctaw, McCurtain and Pushmataha counties of Southeast Oklahoma. The agency will continue to provide the wide array of services available. However, increased efforts to serve the population exhibiting need for one or more of the prioritized needs (housing, substance abuse services, economic/community

development) will be a primary target audience. Programs/ services will target individuals and families with low-incomes.

Program performance goals are set based on a variety of factors. First and foremost, LIFT Community Action Agency, Inc. uses the community needs assessment as a tool and guide to look for opportunities that address the needs as identified by the community. The planning department works with program staff, including leadership, supervisors, front-line and support staff to ensure there is a clear understanding of the programs and outcomes. That information is then written within the planning department but is representative of the data shared by those who operate the programs. The outcomes are designed to align with the program goals and objectives. For example, Self Help Housing has a goal to increase opportunities for people to obtain safe, decent and affordable housing with an objective to build approximately 22 homes each year for families of low-income. Therefore, the outcome listed in the performance measurement outcome spreadsheet would align with this program outcome.

The Performance Measurement Outcomes spreadsheet is included as an upload to the application and is representative of needs identified in the C.N.A. and the Strategic plan. It is included in the excel workbook titled “Pre-Award Agency Questionnaire (see labeled tabs within the workbook).

LIFT CAA operates programs that address the needs of youth, such as Head Start, Early Head Start, Early Head Start/Child Care Partnership, Early Learning Centers, YouthBuild, Healthy Start, and Drug Free Communities Support Program. LCAA will continue to seek funding to expand these programs and to develop additional programs that promote positive youth development.

Other programs focused on promoting positive youth development include the CASA (Court Appointed Special Advocate) Program which utilizes trained CASA volunteers to be the voice for children in the court system and Healthy Start which serves women as well as infants and toddlers through age two years. Through this program, participants receive services aimed at improving health outcomes of newborns and decreasing infant mortality rates, which in large part, focuses on improving the health and encouraging healthy lifestyles of the mother. LCAA partners with members from the health community including OBGYN’s, nurses and others to achieve the program goals.

More than 700 youth receive direct services through the agency’s HS/EHS and Early Head Start/Child Care programs. Eligibility requirements for enrollment in these programs require that a significant percentage of the children enrolled represent households with low-incomes. These children receive educational services that serve to improve not only their cognitive skills but also social and emotional skills. While in the classroom, they receive healthy nutritious meals and snacks.

Through YouthBuild, youth who are considered at-risk (have dropped out of school, are low-income, are in foster care, etc.) are provided opportunities to increase their vocational and educational skills. This occurs through provision of coursework to prepare

these youth to take the GED test as well as vocational skills training in the area of home construction. Through a partnership with the Self Help Housing program, the youth provide a service through volunteering at these construction sites while learning the portable skills of home construction. They are also provided opportunities for life skills training and community service/engagement.

The planning department researches grant opportunities for additional youth-development programs. CASA and Mentoring programs partner with other youth-oriented entities/programs i.e. Men United; Choctaw Nation of Oklahoma's Youth Advisory Board; Boys and Girls Clubs; Health Department; area Schools; and more to address needs of youth in the community.

Drug Free Communities Support Program partners with local schools and Youth Services of Choctaw County to identify and implement strategies aimed at tobacco, marijuana, vaping and substance use prevention.

LCAA staff representing various programs work closely with the Southern Workforce Board for the common goal of helping people obtain their vocational goals. One program that partners with Southern Workforce Board is our YouthBuild program. Through the YouthBuild program, a total of 46 youth (ages 16-24) receive services to include GED preparation and testing as well as vocational skills training relevant to construction. Each of these activities help the youth participants to improve their goals for career development. The YouthBuild program director works with SWB to coordinate additional trainings and skills provided through the WIOA program. We also participate in job/resource fairs by setting up booths and having staff on site to discuss agency programs and job opportunities.

LIFT's transit program transports residents to and from their jobs; the agency builds into its programs components that serve to improve life skills necessary to sustain employment. The agency also secures partnerships with the local workforce board to strengthen opportunities pursued that serve to address employment and/or barriers to employment such as lack of job skills, etc.

In addition, LCAA pursues numerous funding opportunities each year in which partnerships/formal MOU's are entered into with Southern Workforce Board as a coordinated effort to achieve the stated goals. LCAA and SWB have a long standing and good working relationship.

LCAA's CASA and Healthy Start programs provide numerous opportunities which encourage family involvement and strengthen the family unit. This is achieved through planned activities and with the help of partners. The At-Risk and Victims Advocacy programs partner with Men United to assist at-risk youth in developing responsibility and learning specific skills through community improvement events. These men also teach and instill in these young people the importance of community awareness and family

involvement. They serve as mentors to youth, supporting them through any issue they may be facing.

Head Start and Early Head Start have monthly “Dad’s Day” events and other such program activities to encourage and support fatherhood and family initiatives.

Healthy Start employs a Fatherhood Coordinator to increase father/dad or father figure involvement. LCAA programs are well represented on the county coalitions and through the coalitions, many activities occur throughout the year with a focus on father and/or overall parental involvement.

LCAA currently operates an ongoing program to combat malnutrition and starvation within the state of Oklahoma; the Child and Adult Care Food Program (CACFP). CACFP is an entitlement program that guarantees nutritious meals to children through age 12 who are enrolled in family day care homes. By providing free and low cost food to child care providers, CACFP helps to ensure that children are well fed, able to concentrate, and ready to learn. CACFP reimburses participating day care homes for their meal costs. It is administered by the U.S. Department of Agriculture. Staff members also provide training to ensure providers are up to date on issues concerning child nutrition and development.

In addition, there are multiple Community Nutrition Centers within LIFT CAA’s tri-county service area. LIFT CAA’s RSVP Program provides volunteers to serve meals to senior citizens on a daily basis.

For the past twelve years, LCAA has partnered with International Paper Foundation, civic organizations, residents and other community-based organizations locally to raise funds for the food baskets provided to families during the Thanksgiving and Christmas holiday seasons. On average, more than 50 families receive food baskets annually through these ongoing events which will continue through 2023.

LCAA program staff, during the intake process for any client/potential client that visits any LCAA location, can easily identify if/when an individual/family might qualify for SNAP benefits. In these events, many times the LCAA employee will assist the client with the application process and/or assist them with connecting to the local DHS staff to complete an application.

LCAA’s Healthy Start program staff work with infants and mothers, mothers-to-be, as well as expectant mothers. They help program participants in addressing malnutrition not only through education but also with assistance applying for WIC and through referrals.

Additionally, LCAA secures grant funds through International Paper Foundation, Wal-Mart Foundation and other sources to assist local food banks with restocking food in their pantries. Food items are available to families of low-income. Apartment staff representing LCAA’s multifamily program assist food banks in Hugo with packaging and distributing food supplies to families in need.

LIFT CAA has emergency funds available through the Emergency Food and Shelter Program and the LIFT CAA Emergency Fund. These help to address an imminent emergency-situation where a family has found themselves in crisis due to unforeseen/unanticipated circumstances.

The agency acts as the service unit for the Salvation Army activities for all three counties in the service area. Funds raised through the bell ringing campaign which occurs in November and December each year also serve to assist families in need of emergency services.

LCAA operates a Victims Advocacy program that provides emergency assistance for food, shelter, transportation, clothing and other needs to victims of any crime. CASA provides emergency supplies such as Emergency Kits which include hygiene products, clothing, books and stuffed animals for children; Safe Place/Healing Hearts 2 provides emergency kits, transportation, rent deposits, emergency shelter and assistance with medical needs for victims of Sexual Assault, Domestic Violence, Stalking or Dating Violence.

Provision of emergency services are provided through partnerships with DHS, local Court systems, County Health Departments, County Coalitions, Food banks, Salvation Army, Local Jails and Law Enforcement Offices and other linkages. This ensures the ability to address emergency needs of individuals and families in the service area.

LIFT Community Action Agency, Inc. has numerous partnerships at the community level and beyond. These partnerships are identified in the addendum which has been included as an upload. Partnerships represent faith-based, community-based, public and private organizations, other social-service providers, Choctaw Nation of Oklahoma, Southern Workforce Board and more. Many of the programs operated by the agency would not be sustainable without these partnerships.

LIFT Community Action Agency, Inc. is a member of the county coalitions in each county within the agency's service area. The coalitions represent every sector of the community. Members meet monthly and LCAA is well represented at each meeting. LCAA will continue to partner with other entities/organizations, establishing MOU's when applicable in order to address shared goals to improve the lives of families, especially those with low incomes and to address needs within the service area.

Strategies to reduce the duplication of services: Through existing partnerships, attending coalition meetings, active participation in civic and other community-based organizations, etc., LCAA is well aware of the needs of the community and whether or not they are being adequately addressed. LCAA does not "compete" with other organizations locally to address needs, but rather forms both informal and formal partnerships to achieve the shared goals. LCAA is the primary service provider in the tri-county area and the "go-to" agency for most needs aside from those state and federal entities i.e. Department of Human Services, County Health Departments, etc.

The Choctaw Nation of Oklahoma provides some of the same services as does LCAA including Head Start and social service programs. However, this is not considered a duplication of services as most services provided via the Choctaw Nation of Oklahoma are restricted to tribal members.

Many civic, faith-based and charitable entities have representation on LCAA's board of directors and each month, the planning department employees present to the board funding opportunities the agency wants to pursue (requesting board approval to move forward). During these presentations, employees provide a very detailed description of what services would be provided if/when the grant(s) were to be awarded. This provides an opportunity to discuss any existing programs/entities that may already be providing the service.

A few agency programs partnered with other community-based organizations to update the tri-county resource manual which identifies organizations throughout LCAA's service area of Choctaw, McCurtain and Pushmataha counties and beyond. This manual is located in every Head Start and Early Head Start center. It is also shared with other program staff throughout the agency. This provides a tool not only to help identify resource providers but also to identify potential gaps in service. Referrals are made to other organizations if/when LCAA is unable to address the needs of clients or potential clients.

Last but not least, during the Public Meetings held to develop the Community Needs Assessment, participants engage in a process to identify all known existing community resources for addressing the prioritized community needs. These are all listed by service within the Community Needs Assessment report.

A copy of the agency partnership list is included as an attachment to this Community Action Plan.

Success will be defined as having achieved at least 75 percent of the stated outcomes as identified in the logic models. Success will also be measured by increased positive feedback from customers as reflected in the customer satisfaction surveys. Success will also involve increased or enhanced services and partnerships that directly address the prioritized needs (Housing, Substance Abuse Services, and Economic/Community Development). And success will also involve the creation or enhancement of partnerships/collaboration efforts so as to ensure all available resources are being utilized for addressing community needs. LCAA will utilize CAPTAIN and other tracking systems to identify agency staff, board and volunteer training hours to assess agency and stakeholder capacity. Success in terms of agency capacity will equate to adapting to virtual training and volunteer activities in order to acquire and/or sustain capacity. Agency Capacity success will also be measured by reduction in staff turnover.

Implementation

Sections of the CAP such as Logic Models, PMO spreadsheet, that clearly show specific strategies will be shared across programs, with leadership and the Board. These sections will serve as the “roadmap” to help program staff stay on track with working towards the goals and objectives. The entire CAP plan will be shared by email, in paper format, through discussion, etc. with leadership (including Board members), program directors, supervisors, front-line and support staff. This will ensure that all staff are aware of the expected outcomes identified within the CAP for FY2023 which will be a primary focus of agency activities over the year. It will be discussed in detail with Board members who will all be provided copies. Review and analysis of the CAP will occur no less than twice a year for outcome reports and quarterly through customer reports presented to staff and board.

Program Directors will receive monthly reports pulled from CAPTAIN which they use to compare the data (counts, etc.) to the logic models (if applicable) and to the Performance Measurement goals as identified in the spreadsheets. The CAPTAIN Administrator will notify staff of any concerns in terms of not meeting goals, etc. Leadership, staff and Board all work to achieve stated outcomes with the CAPTAIN Administrator being responsible for oversight of the plan implementation. The CAP will be posted to the agency website.

LCAA operates several programs that provide case management including Lending, Head Start, Early Head Start, Early Head Start-Child Care Partnership, Healthy Start, Housing and more. Case management is provided to clients seeking loan funds to help them become loan eligible; services would include credit counseling, budgeting, financial coaching, etc.; Case management is provided to parents/primary caregivers of HS/EHS and EHS/CC youth by Family Advocates working with each family towards setting and achieving goals. Case management is also provided by Housing Coordinators with clients seeking housing services. In the area of housing, case management may involve provision of credit counseling as well as helping families work with creditors to reduce debt (in some cases, having debt written off); budgeting; saving; financial fitness; refinancing home loans to reduce interest rates and more. The housing counselors maintain regular contact with the customers to encourage them and help them “stay on track” so as to increase their chance to improve their current financial situation. The goal is to reduce debt, increase income and become more self-sufficient. Healthy Start clients receive case management through follow up activities provided by the care coordinators to ensure that health screening appointments were kept as well as other activities that serve to support the program goals. Other program participants receive case management via the applicable program staff which serves to facilitate continued participation.

In prior years, the risk assessment report was utilized to assist with case management to help determine the needs of each individual/family requesting services. This report helped the case worker identify the services needed and/or the referrals required in order for the individual/family to be provided with all the assistance and services needed. However, CapSystems, in their work to transition CAPTAIN into ROMA NG (next generation) and in their meetings with Commerce and/or CAP agencies decided to build the pre-assessment questions into the client intake screens.

Data that was critical to the risk assessment was previously collected to the pre-assessment tab in CAPTAIN. That data has now been integrated into the client intake screens. Currently, LIFT C.A.A. utilizes the Service Integration Matrix (SIM) to assist with case management. The SIM allows CAPTAIN users the ability to provide the client with additional services the client may be eligible for, based on the information reported. CAPTAIN data-input staff can email a computer-generated referral letter to the client. If the client is readily available, the letter can be given to them in person. This letter lists the possible services the client is eligible for and the contact information for those programs. By utilizing the SIM feature, LCAA program staff has the opportunity to educate and provide individuals/families with as many services as possible, thus improving customers' chances of achieving self-sufficiency."

Employees responsible for data collection/tracking are trained over the FNPI's and SRV codes applicable to the specific services they provide within their programs. They learn how to appropriately and accurately transfer data from client intake forms into CAPTAIN, the primary tool for tracking outcomes across the agency. The CAPTAIN administrator conducts both group and one-on-one trainings to help each CAPTAIN "user" understand how to input data and how to use that data as a tool for decision making. As the CAPTAIN administrator pulls reports on a monthly basis and analyzes that data against projections, etc., she uses that to determine if/when additional training is needed. When issues arise, specialized or one-on-one training is provided to applicable program staff. Agency-provided programs are required to utilize CAPTAIN for capturing client data, non-client data, staff training; board member training and volunteer hours, etc. This is one method by which the agency is able to track outcomes and outputs.

In addition, nearly every program operated by LCAA is required to utilize specific tracking tools as required by their funder. One example would be housing. Housing counselors use two tracking programs; CounselorMax and ORS (online reporting system) to track outputs and capture the outcomes of the services they provide. Head Start, Early Head Start and Early Head Start/Child Care enter data into Child Plus, Teaching Strategies Gold and other tracking systems. There are numerous "tracking" methods that are program specific and required. All programs are represented on some level in CAPTAIN.

LIFT CAA leverages the CSBG funding with other public and private resources to provide adequate funds to operate many of our anti-poverty programs. Programs receiving CSBG support include Court Appointed Special Advocates, Retired and Senior Volunteer Program, Housing, CSBG/CAPTAIN/ROMA administrator, Community Projects, Early Learning Centers, and others as needed. LCAA has used its CSBG funding in a similar manner for many years. CSBG funding helps to support many of the tools (Community Needs Assessment, Strategic Plan, etc.) that help with agency decision making processes. CSBG funds are leveraged with other federal, state, and foundation resources received by the aforementioned programs.

Customer Satisfaction is collected via a Customer Satisfaction Survey. The survey identifies the department from which the customer sought and/or received services. It

offers three choices to identify “level of satisfaction which includes: “Very Satisfied” “Somewhat Satisfied” or “Not Satisfied”. The survey encourages customers to elaborate and leave feedback for ways the agency could improve upon service provision. The survey also collects demographics i.e. gender, age ranges, race and ethnicity.

All customer satisfaction surveys, whether completed online or on paper are maintained by the ROMA/CSBG Administrator. She inputs all responses into one database and provides quarterly reports to the Board and leadership on the analysis of the surveys. This includes rate of return by program and county reporting; response percentages on levels of satisfaction, etc.

When a survey reveals a need for action, the response is immediately forwarded to the appropriate program staff. Customer satisfaction feedback is used in planning and for staff training purposes. Survey responses are helpful in identifying strategies or areas where the agency could improve and for identifying potential barriers/issues and gaps in services.

Observations of Results and Reporting the Achievement of Results

Data will be collected by assigned/appropriate data collection staff in each program and for each need identified in the logic models. This data comes from client intake forms and is transferred into CAPTAIN and/or other tracking systems. Data/outcomes will be reviewed monthly by the CAPTAIN administrator. The CAPTAIN administrator shares reports with program staff on a monthly basis and with the Board no less than once per year. Logic models are included for both FY22 Final and FY23 Planning within the Pre-Award Agency Questionnaire excel workbook.

Information for the CSBG Annual report comes primarily from CAPTAIN reports. The information is used to help better understand who represents the agency’s clients; to ensure services are being targeted and provided to the target audiences of individuals/families with low-incomes; as a tool for decision making and planning purposes. The CAPTAIN administrator will share annual report data with leadership, board and staff. Initial data input occurs at the program level by assigned and trained CAPTAIN data entry personnel. Financial modules are completed by the fiscal department. Additionally, the ROMA/CSBG Administrator works with program staff to set targets, etc.

Customer satisfaction data will be shared with the Board and ODOC on a quarterly basis and as necessary with staff to address any issues. Program reports will be shared with appropriate staff and program directors on a monthly basis. The data will be used to assess if program goals are being met and identify any barriers or gaps. The SIM feature in CAPTAIN will be utilized for identifying services outside of those sought by clients for which they may be eligible. Outcome data will be shared across programs through presentations and by email so as to ensure that a holistic approach to service delivery is being achieved.

Leadership, program directors, front-line staff and others provide reports over one or two programs during each monthly board meeting. The planning director, program planners, ROMA/CSBG/CAPTAIN Administrator, Fiscal Officer, Executive Director, etc. provides updates on logic models, Community needs assessment, Performance Management outcomes, Community Action Plan, Strategic Plan, etc. no less than once per year. The CSBG/ROMA/CAPTAIN Administrator provides reports over customer satisfaction quarterly and updates on achievement of outcomes via the annual report annually.

Analysis of Data and Evaluation

The process varies depending upon the year i.e. if it is a strategic planning year, a Community Needs assessment year, etc. Data analysis is conducted over reports pulled from CAPTAIN on an ongoing basis and typically involves the CAPTAIN administrator, data entry staff and program staff. This level of evaluation is for purposes of understanding reports, identifying any variances within stated outcomes/goals and what is pulled from reports. It begins at the CAPTAIN administrator to Data Entry person level and then goes further to involve front-line staff, supervisors and leadership as necessary. This type of data analysis ensures that data collection over the outcomes is being collected appropriately and occurs monthly.

Data analysis and evaluation of the Strategic Plan occurs annually with program staff, leadership and Board. This involves a review of the plan and discussion of any/all known changes within the community that have impacted the plan.

Data analysis over the Community Needs Assessment involves stakeholders to include other service providers, residents, customers, staff, leadership, faith-based community, educational community, volunteers, public/private sectors and Board. The formal process occurs once every three years but the plan is updated annually.

Customer satisfaction data is collected on an ongoing basis by program staff and forwarded to the CAPTAIN administrator who maintains the surveys and transfers the responses into an electronic database. This data is shared quarterly with Board members and staff. It is shared on an “as-needed” basis with appropriate staff to ensure timely responses/actions for any survey that includes information that is concerning to the agency. Analysis of this data involves looking at the demographics of the survey responses especially the counties and programs from where services were received. This helps with decision making for staff training, need for increased marketing in certain areas, etc.

Performance evaluation is ongoing throughout the year. However, a more formal evaluation is conducted towards the end of the year in preparation for completion of the CSBG Annual Report, Board Trainings/Reports; Review of the CAP and Strategic Plans, etc. The final formal performance evaluation for 2022 began in October of 2022 and started with a review of the logic models. The next step was to generate CAPTAIN and

other reports to determine if the stated outcomes within the logic models had been met. The logic models with results were shared with leadership, front-line staff, directors and the Board. Also, a review by staff over the performance measurement outcomes was completed. This occurred initially with the CAPTAIN administrator, planning director, front-line staff and leadership. Each program was reviewed and Program Directors as well as front line staff provided updates as to challenges, opportunities, etc. that were faced by their respective programs.

The Planning Director and the CAPTAIN Administrator held several in-depth discussions with program staff to determine if all outcomes that can be captured were being captured and if any additional data needed to be added for tracking. This is considered “Program Level Evaluation.” Evaluation analysis reports over program outcomes were provided to the board in October of 2022 by the CAPTAIN Administrator. No significant changes will occur.

The outcomes (from monthly reports pulled from CAPTAIN, Customer Satisfaction and other reporting software) will be used as a tool for gauging success rates and making revisions, if necessary, to the Community Action Plan and the Strategic plan throughout the year. Revisions will only be made following a thorough review by staff, leadership and the Board. In the event revisions occur, those would be included to the appropriate documents as “addendums” and the revised plans would be forwarded to staff, board, and the appropriate ODOC staff.

LCAA’s Community Needs Assessment identified that the service area and area assessed are one in the same. While the primary target audience includes families with low-incomes, many agency programs are available across various income ranges. LCAA will utilize the Annual Report which includes demographics on those receiving services to compare to the demographics of the service area as reflected from the CARES network, Community Commons, and Census data. This data will help to identify if the population being served is representative of the community “in need.” Given the high incidence of poverty in the service area, LCAA does not expect to see any significant variances.

Recommendations for change/revisions, if deemed necessary, will be presented to the Board during a regularly scheduled board meeting and will require discussion, review, consideration and may require a vote by the board prior to any changes. In the event an action i.e. change in needs focus were to be proposed, all stakeholders would be provided an in-depth analysis as to why that action was proposed. Only after careful consideration and analysis would any recommendations for such actions be requested. Staff would also recommend to the Board making changes to the outcomes/objectives within the logic models, other sections of the CAP plan, the Strategic Plan, etc. in the event of some unexpected need arising that would call upon the agency to adjust.

Performance goals will be revised based on actual results if/when there exists a significant variance between the two. Again, this would only occur after a thorough review/analysis to determine why the variance exists. If actual results are lower than goals, an analysis of outreach efforts, staffing, and any other causes leading to the

variance would be thoroughly reviewed prior to adjusting the goals. This type of analysis could reveal there is simply a need to increase marketing of a specific program etc.

Should the actual results be greater than the stated goals, then a review/analysis will be conducted to determine contributing factors. This review may reveal that additional funding was secured for a particular service or staff had undergone some specialized training allowing them to improve performance, etc. Adjusting the goals then would be based on knowledge and/or expectations as to whether the conditions present i.e. increased funding were expected to remain a constant. If so, goals would be adjusted accordingly to better align with expected outcomes.

LCAA's performance goals are set by program staff and leadership who have knowledge of funding, staffing, need, customer base, etc. Given all the consideration that goes into the goal setting on the front end, the actual results have historically aligned well with the projections. However, conditions change and review and analysis provide the opportunity to explore those changes and adjust accordingly. Any/all changes will be approved, when necessary, at each level to include program staff, leadership and Board.

The Completed ROMA plan is included as a separate tab within this Agency Pre Award Questionnaire worksheet titled "ROMA Plan". The ODOC-provided template has been completed with dates, persons responsible, etc.

The partnership list as generated from CAPTAIN can be found on the following pages.

App#	Name	Case Type	Activity	Activity Date	Milestone	Date
00000030	CHOCTAW/PUSHMATAHA COUNTY YOUTH SERVICES	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000030	CHOCTAW/PUSHMATAHA COUNTY YOUTH SERVICES	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000031	DEPARTMENT OF HUMAN SERVICES CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	10/18/2022	B.5d. - State Government	10/18/2022
00000032	DEPARTMENT OF HUMAN SERVICES MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	10/18/2022	B.5k. - Health Service Organizations	10/18/2022
00000033	DEPARTMENT OF HUMAN SERVICES PUSHMATAHA COUNTY	Community Partner	Community-Wide Partnerships	10/18/2022	B.5k. - Health Service Organizations	10/18/2022
00000037	KIAMICHI TECHNOLOGY CENTER CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	10/24/2022	B.5i. - Institutions of Post-Secondary Education/Training	10/24/2022
00000044	SOS FOR FAMILIES	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000045	OSU EXTENSION CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	10/24/2022	B.5i. - Institutions of Post-Secondary Education/Training	10/24/2022
00000047	OSU EXTENSION PUSHMATAHA COUNTY	Community Partner	Community-Wide Partnerships	10/24/2022	B.5i. - Institutions of Post-Secondary Education/Training	10/24/2022
00000064	HUGO POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/18/2022	B.5c. - Local Government	10/18/2022
00000093	BROKEN BOW HEALTH & REHAB	Community Partner	Community-Wide Partnerships	10/24/2022	B.5k. - Health Service Organizations	10/24/2022
00000101	COLONIAL LODGE RETIREMENT CENTER	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000113	HILLS NURSING HOME	Community Partner	Community-Wide Partnerships	10/18/2022	B.5k. - Health Service Organizations	10/18/2022
00000114	CHOCTAW NATION SERVICE CENTER - HUGO	Community Partner	Community-Wide Partnerships	10/18/2022		
00000114	CHOCTAW NATION SERVICE CENTER - HUGO	Community Partner	Community-Wide Partnerships	10/24/2022	Tribal Government	10/24/2022
00000134	WILDLIFE HERITAGE MUSEUM	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000142	HOUSING & URBAN DEVELOPMENT	Community Partner	Community-Wide Partnerships	10/18/2022		
00000142	HOUSING & URBAN DEVELOPMENT	Community Partner	Community-Wide Partnerships	10/24/2022	B.5g. - Consortiums/Collaborations	10/24/2022
00000143	HOUSING ASSISTANCE COUNCIL	Community Partner	Community-Wide Partnerships	10/18/2022		
00000143	HOUSING ASSISTANCE COUNCIL	Community Partner	Community-Wide Partnerships	10/24/2022	B.5g. - Consortiums/Collaborations	10/24/2022
00000146	MICHELE APLIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000146	MICHELE APLIN DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation	10/24/2022
00000151	SARAH BELL DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000151	SARAH BELL DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation	10/24/2022
00000153	MARY BLANKENSHIP DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000153	MARY BLANKENSHIP DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation	10/24/2022
00000159	STACEY BURCHFIELD DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000159	STACEY BURCHFIELD DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation	10/24/2022
00000161	MELANIE CADY DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022

00000161 MELANIE CADY DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000163 FELICIA CLANTON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000163 FELICIA CLANTON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000165 WENDY CLIFTON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000165 WENDY CLIFTON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000167 TRACY COHEE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000167 TRACY COHEE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000168 STACY COZART DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000168 STACY COZART DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000171 TERI DALLIS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000171 TERI DALLIS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000173 ELAINE DEAN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000173 ELAINE DEAN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000174 SHIRLEY LEWIS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000174 SHIRLEY LEWIS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000175 KIM DEMAS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000175 KIM DEMAS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000176 BRENDA DERVIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000176 BRENDA DERVIN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000179 RESHONE EGGLESTON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000179 RESHONE EGGLESTON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000181 TAMMY FINES DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000181 TAMMY FINES DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000182 ROBERTA FONTENOT DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000182 ROBERTA FONTENOT DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000185 MARY FRYE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000185 MARY FRYE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022

00000188 AMBER GARCIA DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000188 AMBER GARCIA DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000191 JANELLE GILBERT DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000191 JANELLE GILBERT DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000192 CYNTHIA GODWIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000192 CYNTHIA GODWIN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000193 CHRISTINA GOOCH DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000193 CHRISTINA GOOCH DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000194 BRENDA GREEN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000194 BRENDA GREEN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000195 SANDRA GRIMSLEY DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000195 SANDRA GRIMSLEY DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000197 LISA HAMILTON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000197 LISA HAMILTON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000198 ROSANN HANES DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000198 ROSANN HANES DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000203 ROSA HERNANDEZ DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000203 ROSA HERNANDEZ DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000204 JENNIFER HIGNIGHT DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000204 JENNIFER HIGNIGHT DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000205 SONYA HILL DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000205 SONYA HILL DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000206 JENIFER HOOD DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000206 JENIFER HOOD DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000208 KATHY JOHNSON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000208 KATHY JOHNSON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000210 KIM JOHNSON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022

00000210 KIM JOHNSON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000213 LAMARA JONES DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000213 LAMARA JONES DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000214 DEBORAH KENYON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000214 DEBORAH KENYON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000216 KRISTIE LAMBERT DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000216 KRISTIE LAMBERT DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000218 TAMMY LEE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000218 TAMMY LEE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000219 SHELLY LEIGH DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000219 SHELLY LEIGH DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000222 MARIA LOPEZ DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000222 MARIA LOPEZ DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000223 MYNISHIA MALONE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000223 MYNISHIA MALONE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000224 CAROLYN MANN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000224 CAROLYN MANN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000227 LASHAWN MARTIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000227 LASHAWN MARTIN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000229 EDIE MARTZALL DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000229 EDIE MARTZALL DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000230 LUELLEN MCCLESKEY DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000230 LUELLEN MCCLESKEY DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000238 RONDA MOORE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000238 RONDA MOORE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000239 CARRIE MORENO DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000239 CARRIE MORENO DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022

00000242	HEIDI MULLER DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000242	HEIDI MULLER DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000248	TERESA PERRIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000248	TERESA PERRIN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000250	CECELIA PILGRIM DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000250	CECELIA PILGRIM DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000251	STACI POLLARD DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000251	STACI POLLARD DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000252	CAROLYN PULLEN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000252	CAROLYN PULLEN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000254	CAROL RANKIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000254	CAROL RANKIN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000255	PAM REDFORD DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000255	PAM REDFORD DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000257	BRIDGET RICHARDS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000257	BRIDGET RICHARDS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000264	RACHELLE SANDERS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000264	RACHELLE SANDERS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000265	THERESA SHIRLEY DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000265	THERESA SHIRLEY DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000266	VICTORIA SISSOM DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000266	VICTORIA SISSOM DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000267	LATOSHA SLOAN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000267	LATOSHA SLOAN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000269	ANGELA SMITH DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000269	ANGELA SMITH DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000271	SHANNON SMITH DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000271	SHANNON SMITH DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022

00000278	MELISSA TAYLOR DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000278	MELISSA TAYLOR DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000279	JULIE TUCKER DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000279	JULIE TUCKER DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000280	KENYETTA TURNER DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000280	KENYETTA TURNER DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000281	YOLANDA TURNER DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000281	YOLANDA TURNER DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000282	KAMI TYLER DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000282	KAMI TYLER DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000283	TAMMY VOEGELI DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000283	TAMMY VOEGELI DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000284	CHRISTY VUNETICH DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000284	CHRISTY VUNETICH DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000286	ELIZABETH WALLACE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000286	ELIZABETH WALLACE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000287	LISA WALSTON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000287	LISA WALSTON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000288	TAMMY WARD DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000288	TAMMY WARD DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000289	KIMBERLY WATSON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000289	KIMBERLY WATSON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000290	TINA WEAVER DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000290	TINA WEAVER DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000295	SHERRY WILLIAMS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000295	SHERRY WILLIAMS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000298	BERNITA WILSON DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022

00000298 BERNITA WILSON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000314 GARY DUVALL DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000314 GARY DUVALL DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000329 NICOLE DUCK DCH	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000329 NICOLE DUCK DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000335 OKLAHOMA STATE DEPARTMENT OF EDUCATION	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000335 OKLAHOMA STATE DEPARTMENT OF EDUCATION	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000336 CITY OF ANTLERS	Community Partner	Community-Wide Partnerships	10/18/2022	B.5c. - Local Government	10/18/2022
00000337 CITY OF HUGO	Community Partner	Community-Wide Partnerships	10/18/2022	B.5c. - Local Government	10/18/2022
00000338 CITY OF IDABEL	Community Partner	Community-Wide Partnerships	10/18/2022	B.5c. - Local Government	10/18/2022
00000338 CITY OF IDABEL	Community Partner	Community-Wide Partnerships	10/18/2022		
00000340 OKLAHOMA ASSOCIATION OF COMMUNITY ACTION AGENCIES	Community Partner	Community-Wide Partnerships	10/18/2022	B.5l. - Statewide Associations or Collaborations	10/18/2022
00000343 OKLAHOMA HEALTH CARE AUTHORITY	Community Partner	Community-Wide Partnerships	10/18/2022		
00000343 OKLAHOMA HEALTH CARE AUTHORITY	Community Partner	Community-Wide Partnerships	10/24/2022	B.5k. - Health Service Organizations	10/24/2022
00000349 SOUTHEASTERN OKLAHOMA STATE UNIVERSITY	Community Partner	Community-Wide Partnerships	10/24/2022	B.5i. - Institutions of Post-Secondary Education/Training	10/24/2022
00000351 DRUG FREE COMMUNITIES	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000362 INCA COMMUNITY SERVICES	Community Partner	Community-Wide Partnerships	10/18/2022		
00000362 INCA COMMUNITY SERVICES	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000380 OKLAHOMA HOUSING FINANCE AGENCY	Community Partner	Community-Wide Partnerships	10/18/2022		
00000380 OKLAHOMA HOUSING FINANCE AGENCY	Community Partner	Community-Wide Partnerships	10/24/2022	B.5l. - Statewide Associations or Collaborations	10/24/2022
00000388 LIFT TRANSIT SYSTEM	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000392 CASA- LIFT	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000396 MEN UNITED	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000411 UNIVERSAL HOUSING DEV CORP RUSSELLVILLE, AR	Community Partner	Community-Wide Partnerships	10/18/2022		
00000411 UNIVERSAL HOUSING DEV CORP RUSSELLVILLE, AR	Community Partner			B.5a. - Non-Profit	11/04/2022
00000419 FAMILY RESOURCES OF N.O. INC NEW ORLEANS, LA	Community Partner	Community-Wide Partnerships	10/18/2022		
00000419 FAMILY RESOURCES OF N.O. INC NEW ORLEANS, LA	Community Partner			B.5a. - Non-Profit	11/04/2022
00000436 PUSHMATAHA COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/18/2022		
00000436 PUSHMATAHA COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000437 CHOCTAW COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/18/2022		
00000437 CHOCTAW COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000438 MCCURTAIN COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/18/2022		
00000438 MCCURTAIN COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000439 ANTLERS MASONIC LODGE	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000440 CHRISTIAN LIFE OUTREACH MINISTRIES	Community Partner	Community-Wide Partnerships	10/18/2022	B.5b. - Faith Based	10/18/2022
00000443 ANTLERS DEER FESTIVAL	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022

00000444	CHOCTAW NATION	Community Partner	Community-Wide Partnerships	10/18/2022 Tribal Government	10/18/2022
00000445	PUSHMATAHA COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000446	CHOCTAW COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000447	MCCURTAIN COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000448	PUSHMATAHA COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000449	CHOCTAW COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000450	MCCURTAIN COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000451	PUSHMATAHA COUNTY COURTS	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000452	CHOCTAW COUNTY COURTS	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000453	MCCURTAIN COUNTY COURTS	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000454	THE CAMPBELL GROUP	Community Partner	Community-Wide Partnerships	10/18/2022 B.5a. - Non-Profit	10/18/2022
00000474	KIAMICHI OPPORTUNITIES INC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000474	KIAMICHI OPPORTUNITIES INC	Community Partner	Community-Wide Partnerships	10/24/2022 B.5a. - Non-Profit	10/24/2022
00000475	LIFT HEAD START	Community Partner	Community-Wide Partnerships	10/24/2022 B.5a. - Non-Profit	10/24/2022
00000476	OKLAHOMA DEPARTMENT OF TRANSPORTATION	Community Partner	Community-Wide Partnerships	10/24/2022 B.5d. - State Government	10/24/2022
00000477	OKLAHOMA TRANSIT ASSOCIATION	Community Partner	Community-Wide Partnerships	10/24/2022 B.5d. - State Government	10/24/2022
00000478	MODIVCARE INC	Community Partner	Community-Wide Partnerships	10/24/2022 B.5f. - For-Profit Business or Corporation	10/24/2022
00000479	FEDERAL TRANSIT ADMINISTRATION	Community Partner	Community-Wide Partnerships	10/24/2022 B.5e. - Federal Government	10/24/2022
00000480	FEDERAL HOME LOAN BANK	Community Partner	Community-Wide Partnerships	10/18/2022	
00000480	FEDERAL HOME LOAN BANK	Community Partner		B.5j. - Financial/Banking Institutions	11/04/2022
00000482	LARISSA LOTT DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000482	LARISSA LOTT DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000490	GRETТА EVANS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000490	GRETТА EVANS DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000493	KARON TEURMAN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000493	KARON TEURMAN DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000496	MONTOYA BOAZ DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000496	MONTOYA BOAZ DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000497	ANNA WHITE DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000497	ANNA WHITE DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000524	TERRY PARK	Community Partner	Community-Wide Partnerships	10/24/2022 B.5c. - Local Government	10/24/2022
00000545	OKLAHOMA HEALTHCARE AUTHORITY	Community Partner	Community-Wide Partnerships	10/18/2022	
00000545	OKLAHOMA HEALTHCARE AUTHORITY	Community Partner	Community-Wide Partnerships	10/24/2022 B.5k. - Health Service Organizations	10/24/2022
00000546	SPROUTS DEVELOPMENT	Community Partner	Community-Wide Partnerships	10/24/2022 B.5a. - Non-Profit	10/24/2022
00000550	BROKEN BOW POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/18/2022 B.5c. - Local Government	10/18/2022
00000553	PROJECT GAIN	Community Partner	Community-Wide Partnerships	10/18/2022 B.5a. - Non-Profit	10/18/2022

00000557 UNITED STATES DEPT. OF AGRICULTURE	Community Partner	Community-Wide Partnerships	10/18/2022		
00000557 UNITED STATES DEPT. OF AGRICULTURE	Community Partner			B.5e. - Federal Government	11/04/2022
00000565 MEGAN HORN DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000565 MEGAN HORN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000569 CHARLESIA KOSANKE DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000569 CHARLESIA KOSANKE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000570 LATOYA BILLS	Community Partner	Community-Wide Partnerships	10/18/2022		
00000570 LATOYA BILLS	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000574 RED RIVER HOOPS CLUB	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000576 OKLAHOMA CASA	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000577 NATIONAL CASA	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000578 PUSHMATAHA COUNTY SHERIFF DEPARTMENT	Community Partner	Community-Wide Partnerships	10/18/2022	B.5c. - Local Government	10/18/2022
00000579 MCCURTAIN COUNTY SHERIFF DEPARTMENT	Community Partner	Community-Wide Partnerships	10/18/2022	B.5c. - Local Government	10/18/2022
00000580 KIDS KOTTAGE	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000581 WEE CARE PREGNANCY CENTER	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000582 THE MASONS OF ANTLERS	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000583 THE MASONS OF TUSKAHOMA	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit	10/18/2022
00000586 NEW BEGINNINGS	Community Partner	Community-Wide Partnerships	10/18/2022	B.5b. - Faith Based	10/18/2022
00000624 NEIGHBORWORKS AMERICA	Community Partner	Community-Wide Partnerships	10/18/2022		
00000624 NEIGHBORWORKS AMERICA	Community Partner	Community-Wide Partnerships	10/24/2022	B.5e. - Federal Government	10/24/2022
00000627 PENNEY RODGERS	Community Partner	Community-Wide Partnerships	10/18/2022	B.5f. - For-Profit Business or Corporation	10/18/2022
00000630 MY BROTHERS PLACE	Community Partner	Community-Wide Partnerships	10/18/2022		
00000630 MY BROTHERS PLACE	Community Partner	Community-Wide Partnerships	10/24/2022	B.5a. - Non-Profit	10/24/2022
00000644 OKLAHOMA DEPARTMENT OF COMMERCE	Community Partner	Community-Wide Partnerships	10/18/2022	B.5d. - State Government	10/18/2022
00000644 OKLAHOMA DEPARTMENT OF COMMERCE	Community Partner	Community-Wide Partnerships	10/18/2022		
00000645 OKLAHOMA ATTORNEY GENERALS OFFICE	Community Partner	Community-Wide Partnerships	10/18/2022	B.5d. - State Government	10/18/2022
00000646 CELESTINE WATSON DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000646 CELESTINE WATSON DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000647 CRYSTEL BURDEN DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000647 CRYSTEL BURDEN DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000649 DESTINY SANDERS DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000649 DESTINY SANDERS DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000651 KATRINA PICKETT DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000651 KATRINA PICKETT DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000656 MAGGIE MONROE DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000656 MAGGIE MONROE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000660 SUSAN HOYLE DCH	Community Partner	Community-Wide Partnerships	10/18/2022		
00000660 SUSAN HOYLE DCH	Community Partner			B.5f. - For-Profit Business or Corporation	10/24/2022
00000661 Waweeta Conchitias DCH	Community Partner	Community-Wide Partnerships	10/18/2022		

00000661 WAVEETA CONCHITIAS DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000674 TAMMY NEAL DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000674 TAMMY NEAL DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000677 REBECCA MARTIN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000677 REBECCA MARTIN DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000678 JENNIFER DUNCAN DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000678 JENNIFER DUNCAN DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000680 TANYA REVELS DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000680 TANYA REVELS DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000682 KELSIE KELLEY DCH	Community Partner	Community-Wide Partnerships	10/18/2022	
00000682 KELSIE KELLEY DCH	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000694 CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL	Community Partner	Community-Wide Partnerships	10/18/2022	
00000694 CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL	Community Partner		B.5a. - Non-Profit	11/04/2022
00000695 NORTHWEST REGIONAL HOUSING AUTHORITY	Community Partner	Community-Wide Partnerships	10/18/2022	
00000695 NORTHWEST REGIONAL HOUSING AUTHORITY	Community Partner		B.5c. - Local Government	11/04/2022
00000696 NORTHEAST COMMUNITY ACTION CORPORATION	Community Partner	Community-Wide Partnerships	10/18/2022	
00000696 NORTHEAST COMMUNITY ACTION CORPORATION	Community Partner		B.5a. - Non-Profit	11/04/2022
00000697 NATIONAL RURAL HOUSING COALITION	Community Partner	Community-Wide Partnerships	10/18/2022	
00000697 NATIONAL RURAL HOUSING COALITION	Community Partner		B.5a. - Non-Profit	11/04/2022
00000698 SOUTHWEST REGIONAL HOUSING AND CDC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000698 SOUTHWEST REGIONAL HOUSING AND CDC	Community Partner		B.5a. - Non-Profit	11/04/2022
00000699 TIERRA DEL SOL HOUSING CORPORATION	Community Partner	Community-Wide Partnerships	10/18/2022	
00000699 TIERRA DEL SOL HOUSING CORPORATION	Community Partner		B.5a. - Non-Profit	11/04/2022
00000700 ZUNI HOUSING AUTHORITY	Community Partner	Community-Wide Partnerships	10/18/2022	
00000700 ZUNI HOUSING AUTHORITY	Community Partner		B.5a. - Non-Profit	11/04/2022
00000701 TRI-COUNTY INDIAN NATIONS CDC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000701 TRI-COUNTY INDIAN NATIONS CDC	Community Partner		B.5a. - Non-Profit	11/04/2022
00000702 INTER-LAKES COMMUNITY ACTION PARTNERSHIP, INC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000702 INTER-LAKES COMMUNITY ACTION PARTNERSHIP, INC	Community Partner		B.5a. - Non-Profit	11/04/2022
00000703 COMMUNITY DEVELOPMENT CORPORATION OF BORWNSVILLE	Community Partner	Community-Wide Partnerships	10/18/2022	
00000703 COMMUNITY DEVELOPMENT CORPORATION OF BORWNSVILLE	Community Partner		B.5a. - Non-Profit	11/04/2022
00000704 PROYECTO AZTECA, INC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000704 PROYECTO AZTECA, INC	Community Partner		B.5a. - Non-Profit	11/04/2022
00000705 LOWER VALLEY HOUSING CORPORATION	Community Partner	Community-Wide Partnerships	10/18/2022	

00000705 LOWER VALLEY HOUSING CORPORATION	Community Partner		B.5a. - Non-Profit	11/04/2022
00000706 NATIONAL RURAL SELF-HELP HOUSING ASSOCIATION	Community Partner	Community-Wide Partnerships	10/18/2022	
00000706 NATIONAL RURAL SELF-HELP HOUSING ASSOCIATION	Community Partner		B.5a. - Non-Profit	11/18/2022
00000708 HOUSE ON THE ROCK- MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	10/18/2022 B.5b. - Faith Based	10/18/2022
00000715 LIFT SELF-HELP HOUSING	Community Partner	Community-Wide Partnerships	10/18/2022	
00000715 LIFT SELF-HELP HOUSING	Community Partner	Community-Wide Partnerships	10/24/2022 B.5a. - Non-Profit	10/24/2022
00000736 FELECIA JONES	Community Partner	Community-Wide Partnerships	10/18/2022	
00000736 FELECIA JONES	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000737 CHASITIE WOLFE	Community Partner	Community-Wide Partnerships	10/18/2022	
00000737 CHASITIE WOLFE	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000738 AURIEL GREEN	Community Partner	Community-Wide Partnerships	10/18/2022	
00000738 AURIEL GREEN	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000739 WHITNEY HARRIS	Community Partner	Community-Wide Partnerships	10/18/2022	
00000739 WHITNEY HARRIS	Community Partner		B.5f. - For-Profit Business or Corporation	10/24/2022
00000742 SOUTHERN WORKFORCE BOARD	Community Partner	Community-Wide Partnerships	10/24/2022 B.5a. - Non-Profit	10/24/2022
00000743 BIG 5 COMMUNITY ACTION	Community Partner	Community-Wide Partnerships	10/18/2022	
00000743 BIG 5 COMMUNITY ACTION	Community Partner		B.5a. - Non-Profit	11/18/2022
00000744 CHOCTAW ELECTRIC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000744 CHOCTAW ELECTRIC	Community Partner	Community-Wide Partnerships	10/24/2022 B.5f. - For-Profit Business or Corporation	10/24/2022
00000745 PSO ELECTRIC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000745 PSO ELECTRIC	Community Partner	Community-Wide Partnerships	10/24/2022 B.5f. - For-Profit Business or Corporation	10/24/2022
00000746 COMMUNITY RESOURCE TECHNICIAN, INC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000746 COMMUNITY RESOURCE TECHNICIAN, INC	Community Partner		B.5a. - Non-Profit	11/18/2022
00000747 KOESTER NON PROFIT SERVICES	Community Partner	Community-Wide Partnerships	10/18/2022	
00000747 KOESTER NON PROFIT SERVICES	Community Partner		B.5a. - Non-Profit	11/18/2022
00000748 LIBERTY RESTORATION COMMUNITY DEVELOPMENT	Community Partner	Community-Wide Partnerships	10/18/2022	
00000748 LIBERTY RESTORATION COMMUNITY DEVELOPMENT	Community Partner		B.5a. - Non-Profit	11/18/2022
00000749 INTEGRITY HOMEBUYERS ASSOCIATION	Community Partner	Community-Wide Partnerships	10/18/2022	
00000749 INTEGRITY HOMEBUYERS ASSOCIATION	Community Partner		B.5a. - Non-Profit	11/18/2022
00000750 HABITAT FOR HUMANITY ST. TAMMY WEST	Community Partner	Community-Wide Partnerships	10/18/2022	
00000750 HABITAT FOR HUMANITY ST. TAMMY WEST	Community Partner		B.5a. - Non-Profit	11/18/2022
00000751 DELTA AREA ECONOMIC OPPORTUNITY CORP.	Community Partner	Community-Wide Partnerships	10/18/2022	
00000751 DELTA AREA ECONOMIC OPPORTUNITY CORP.	Community Partner		B.5a. - Non-Profit	11/18/2022
00000752 HIGH PLAINS COMMUNITY DEVELOPMENT CORP.	Community Partner	Community-Wide Partnerships	10/18/2022	
00000752 HIGH PLAINS COMMUNITY DEVELOPMENT CORP.	Community Partner		B.5a. - Non-Profit	11/18/2022
00000753 BLUE VALLEY COMMUNITY ACTION	Community Partner	Community-Wide Partnerships	10/18/2022	

00000753 BLUE VALLEY COMMUNITY ACTION	Community Partner		B.5a. - Non-Profit	11/18/2022
00000754 NEIGHBORWORKS NORTHEAST NEBRASKA	Community Partner	Community-Wide Partnerships	10/18/2022	
00000754 NEIGHBORWORKS NORTHEAST NEBRASKA	Community Partner		B.5a. - Non-Profit	11/18/2022
00000755 HELPING HANDS NOW	Community Partner	Community-Wide Partnerships	10/18/2022	B.5a. - Non-Profit
00000756 NEIGHBORHOOD HOUSING SERVICES OF OKC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000756 NEIGHBORHOOD HOUSING SERVICES OF OKC	Community Partner		B.5a. - Non-Profit	11/18/2022
00000757 NEIGHBORHOOD HOUSING SERVICES OF WACO, INC	Community Partner	Community-Wide Partnerships	10/18/2022	
00000757 NEIGHBORHOOD HOUSING SERVICES OF WACO, INC	Community Partner		B.5a. - Non-Profit	11/18/2022
00000758 FAMILY DESTINY	Community Partner	Community-Wide Partnerships	10/18/2022	
00000758 FAMILY DESTINY	Community Partner		B.5a. - Non-Profit	11/18/2022
00000759 ED 360	Community Partner	Community-Wide Partnerships	10/18/2022	
00000759 ED 360	Community Partner		B.5a. - Non-Profit	11/18/2022
00000760 SOUTHEAST NEBRASKA DEVELOPMENT DISTRICT	Community Partner	Community-Wide Partnerships	10/18/2022	
00000760 SOUTHEAST NEBRASKA DEVELOPMENT DISTRICT	Community Partner		B.5a. - Non-Profit	11/18/2022
00000761 USDA RURAL DEVELOPMENT	Community Partner	Community-Wide Partnerships	10/18/2022	
00000761 USDA RURAL DEVELOPMENT	Community Partner	Community-Wide Partnerships	10/24/2022	B.5e. - Federal Government
00000769 LATOYA MAYFIELD DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation
00000770 JESSICA STEWART DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation
00000771 BAYLEE PAVLICEK DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation
00000772 AMANDA CLEEK DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation
00000773 KALEIGH STRICKLAND DCH	Community Partner	Community-Wide Partnerships	10/24/2022	B.5f. - For-Profit Business or Corporation
00000774 OKLAHOMA DISTRICT ATTORNEY COUNCIL	Community Partner	Community-Wide Partnerships	10/24/2022	B.5d. - State Government
00000775 CHOCTAW COUNTY SHERIFF OFFICE	Community Partner	Community-Wide Partnerships	10/24/2022	B.5c. - Local Government
00000776 IDABEL POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/24/2022	B.5c. - Local Government
00000777 ANTLERS POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/24/2022	B.5c. - Local Government
00000778 MAGNOLIA CDC	Community Partner	Community-Wide Partnerships	11/18/2022	B.5a. - Non-Profit
00000779 LAKE AREA CDC	Community Partner	Community-Wide Partnerships	11/18/2022	B.5a. - Non-Profit

2023 ROMA LOGIC MODEL Planning

☒ Family ☐ Community ☐ Agency

LIFT Community Action Agency, Inc.

Program: Housing

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our Community has a need for increased safe, decent and affordable housing units	Work with local contractors to construct and/or complete five additional multi-family units	Increased safe, decent and affordable housing opportunities for individuals and families of low income	By 12/31/2023, 2 of 2 (100%) additional multi-family complexes will be constructed (one in Hugo, OK. and one in Antlers, OK.) to provide housing for families of low-income	100%	Number of units constructed	Agency database will be maintained by housing director and/or apartment manager and will be updated to reflect number and location of new units constructed.	Data will be reported once annually with the updated logic models that reflect the "Results" by the Planning Department Staff.
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	

*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.

ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project

2023 ROMA LOGIC MODEL Planning

☐ Family ☒ Community ☐ Agency

LIFT Community Action Agency, Inc.

Program: Substance Use and Abuse

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our Community has a need for additional substance use/abuse resources and supportive services.	Collaborate with community-based organizations, law enforcement and others and hold Substance Use/Abuse awareness and resource events	The community will have increased capacity to address needs surrounding substance use/abuse	By 12/31/2023, 5 out of 5 (100%) awareness events about substance use/abuse and available resources will occur in collaboration with 2 of out 10 (20%) community partners	180%	Number of events held and number of community-based organizations collaborating on the efforts as measured by sign-in sheets; Partnerships (formal and informal)	The Second Chance and Tri-County Opioid Implementation Program Directors have documentation to include flyers, social media posts, sign-in sheets, Partnership agreements, etc. and will document on time sheets and in funder reports	Data will be collected following each event and will be reported annually with the updated logic models that reflect the "Results" by the Planning Department Staff.
				Out of the 9 diffent types of training 167 trainings occurred.			
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	

*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.

ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project

2023 ROMA LOGIC MODEL Planning

☐ Family ☒ Community ☐ Agency

LIFT Community Action Agency, Inc.

Program: Economic Development

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our Community has a need for increased or expanded community and economic development activities to improve our local economy	LIFT CAA will plan and host tourism-related events at the agency-operated parks to boost the local economy	Improved economy via tourism activities	By 12/31/2023, LIFT CAA will host 4 out of 4 (100%) recreational community events within the three agency-operated parks (Hugo, Clayton and Ft. Towson)	75%	Number of events held	The Park Managers will work with leadership to plan recreational events at the parks to promote tourism. The Park managers and Staff will work with the Public Relations department to advertise and promote the events	Park managers will report number of events planned, number of events held, number of visitors at each event to the Associate Director as each event is completed. The outcome indicator will be used as the baseline and the "results" within the logic model will be presented to the board annually.
				December Raymond Gary will host the boat parade.			
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	

*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.

ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project

2023 ROMA LOGIC MODEL Planning

☐ Family ☐ Community ☒ Agency

LIFT Community Action Agency, Inc.

Program: Agency

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our agency has a need to increase capacity to better serve the needs of our customers	LIFT will recognize 12 employees for going above and beyond; LIFT will hold "stress reduction" activities no less than monthly in each location	Reduced employee turnover via Improved job satisfaction	By 12/31/2023, the number of staff vacancies will be reduced by 15% (6 out of 40 vacancies filled from baseline of 40 job openings on established 12/1/2022	125%	Human Resource Software of Available jobs and vacancies.	HR Staff will report the number of available jobs, the number of vacancies to the Planning Department Staff	HR Staff will provide quarterly updates via email communication to the Planning Department staff. Planning Department will report to the Board and ODOC annually via an updated logic model with "Results".
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	

*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.

ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project

LIFT COMMUNITY ACTION AGENCY, INC.'S Strategic plan **2023-2025**



Board Approved:
December 13, 2022

EXECUTIVE SUMMARY

In 1968, three separate Community Action Agencies in Choctaw, McCurtain and Pushmataha Counties merged to better meet the needs of residents in Southeast Oklahoma. LIFT Community Action Agency, Inc. formerly known as Little Dixie Community Action Agency, Inc. was incorporated as a Non-Profit Organization on April 4, 1968. The agency's purpose, as stated in its original Articles of Incorporation was "To assist in developing, executing and coordinating plans and the programs authorized under the Economic Opportunity Act of 1964. Throughout its history, LIFT has progressively grown, adding new programs and services to meet the needs of the area, especially its most vulnerable populations.

On September 22, 2022, LIFT Community Action Agency, Inc. enlisted the assistance of Strategic Planning Consultant and Nationally Certified ROMA Trainer - Julia Teska, PhD. to conduct a Strategic Planning Meeting which was critical to determining priorities, establishing goals, and creating objectives.

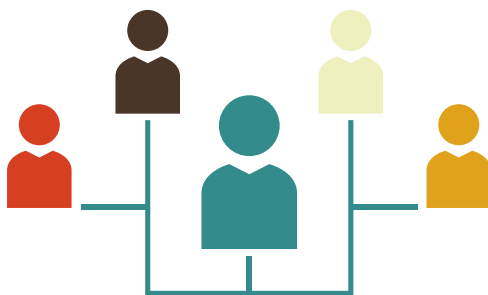
Key staff involved in facilitating the strategic planning process attended conferences and trainings presented by National Community Action Partnership staff. The presenters trained participants on how to incorporate ROMA and how to make sure the plan represents compliance with the Community Service Block Grant Organizational Standards.

The development of this plan involved multiple processes which included:

- In-depth review and analysis of Community Needs Assessment report.
- Review of the agency's Mission, Vision and Core Values.
- Survey collection and feedback from key stakeholders including front line staff, leadership and board.
- SWOT analysis activity with agency Board of Directors.
- Current environmental scan of the agency's service area.
- Review and analysis of 2022 Customer Satisfaction Surveys.
- Research of agency and community resources.

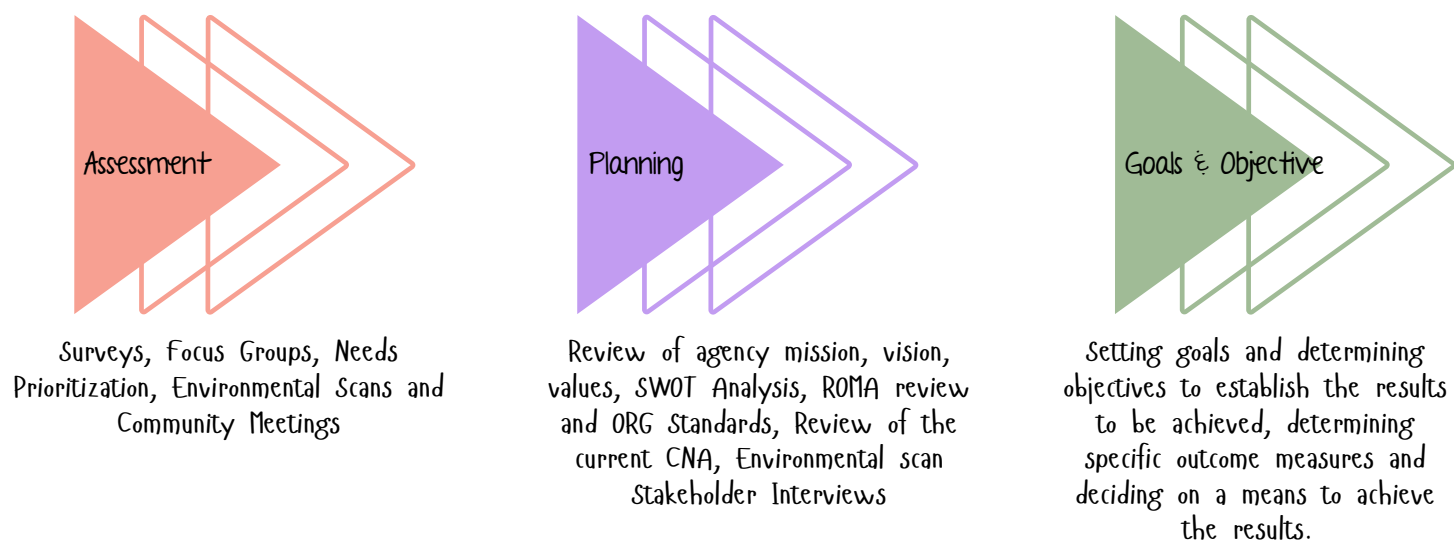
Each process resulted in reviewing and analyzing qualitative and quantitative data. These activities helped with the development of the strategies and benchmarks listed within this plan.

The Plan serves as a roadmap and identifies actions that LIFT Community Action Agency, Inc. will undertake over the next three years in order to address needs as identified in our most recent Community Needs Assessment (2022).



STRATEGIC PLANNING PROCESS

Development of the strategic plan included the following phases with multiple steps and analysis in each phase. The report that follows is organized in these phases as well.



Assessment

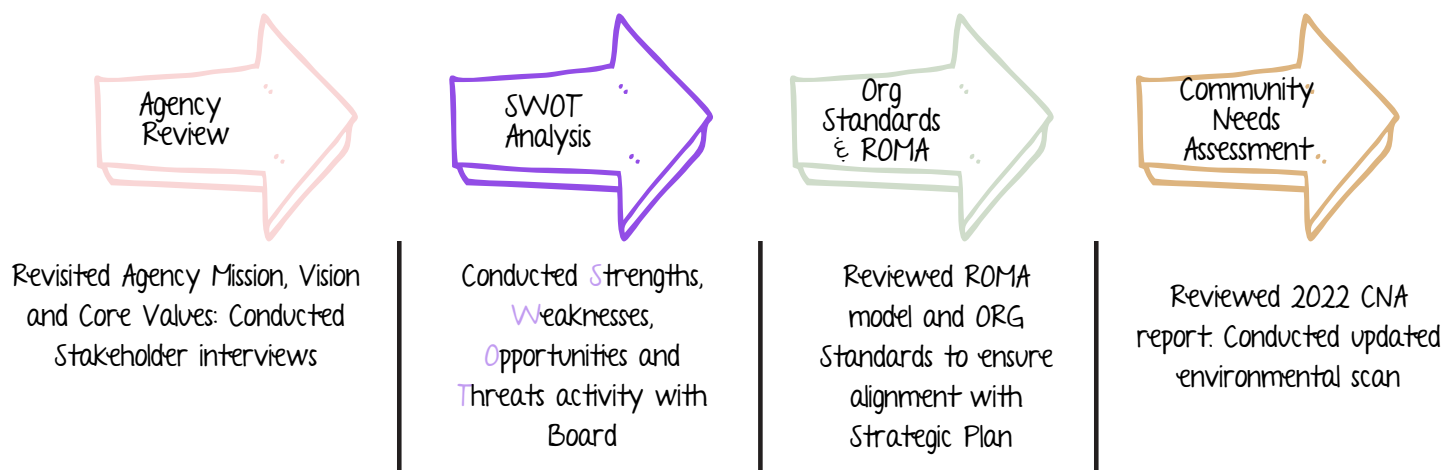
The assessment phase included survey collection which occurred from May 2021 through October 2021; 506 surveys were completed and collected. LCAA used the Oklahoma Standardized community needs assessment survey to obtain resident demographics and needs as identified by the respondents. In addition, information from customer satisfaction surveys, the U.S. Census and other reliable online databases were used for assessing needs. After all data was compiled, prioritization of needs was achieved by focus groups which included agency and community leaders, Board members, and front line staff. The prioritization process resulted in identifying the top three community needs that would be the focus of agency efforts over the next three years. Six separate community needs meetings were held to obtain community input over causes/conditions of poverty; to identify existing community resources; and to identify possible strategies to address the needs.

Causes and conditions of poverty, as they relate to the top three prioritized needs were discussed at length during each of the community needs meetings. The top three needs were identified as:

- Housing: Availability of safe, decent and affordable housing is lacking throughout the entire service area.
- Substance Use/Abuse: There is a need for supportive services to address substance use/abuse
- Economic/Community Development; There is a need to improve the local economy to boost economic and community development

Detailed data over key findings is included in the agency's most recent Community Needs Assessment report which is available on the agency website at liftca.org

Planning



AGENCY REVIEW

During the Board of Directors Meeting on October 11th, 2022, Board Members conducted an analysis of the agency's Mission, Vision and Core Values Statements. The goal was to determine if the language aligned with our agencies current programs and services. After review, the Board voted to keep our current statements with no changes. Other components of the Agency Review included stakeholder interviews. This process involved survey completion by leadership and frontline staff to collect data from these key stakeholders to help with the development of the Strategic Plan.

Mission: "To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency."

LIFT's Board of Directors and Key Leadership identified our population as everyone we serve and that we are committed to serving each customer. Additionally, each group felt the mission aligned with the programs and services which the agency is known for and includes the CSBG four key elements.

Vision: "To free generations of people from poverty."

LIFT's Board of Directors and Key Leadership identified our vision statement as effective, brief and easy to communicate. Both groups also felt strongly that our vision statement is shared by members of the community.

CORE Values: "CHOICES"
Compassion; Honesty;
Optimism; Integrity;
Community;
Empowerment; and
Stewardship

LIFT's Board of Directors and Key Leadership felt the agency's core values aligned with what the agency stands for and is a reflection of our work. Additionally, both groups felt the values statement accurately represented how we treat our clients.

SWOT ANALYSIS

The Board completed an activity (SWOT) where members independently identified strengths, weakness, opportunities and threats. Following this activity Board Members engaged in open discussion and grouped/prioritized responses in each category. Agency staff also completed a SWOT analysis. The combined responses are represented below.

Internal

Strengths:

- Board & Leadership
- Strong Experienced Employees
- Community Partners
- Great Programs

Weaknesses:

- Staff Turnover/shortages
- Low Pay Scale
- Lack of service awareness in some programs
- Lack of diversity
- Unskilled workforce

External

Opportunities:

- Multiple Marketing platforms
- Partnerships
- Non-Profit Federal, State and foundation funding streams.
- Strong and large Volunteer base
- Community support and buy-in

Threats:

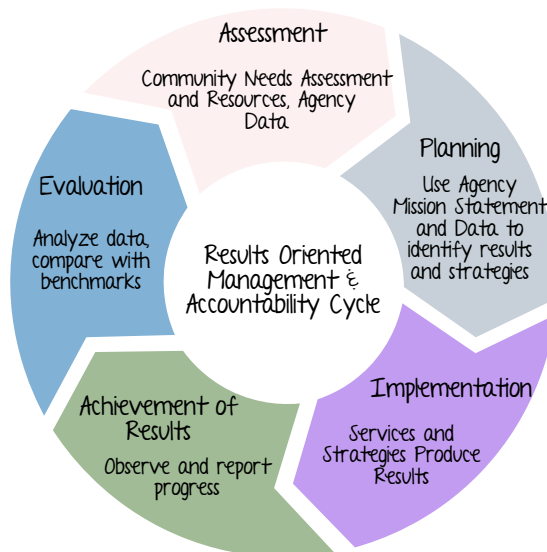
- Competition for Funding
- Government Changes
- Funding and program reductions and/or cuts
- Inflation
- Challenges with staying competitive

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RESULTS ORIENTED MANAGEMENT & ACCOUNTABILITY (ROMA)

Strategic planning is a key component and embodiment of Results Oriented Management and Accountability. As a component of ROMA, strategic planning constitutes the second phase of the ROMA cycle, planning. However, the strategic planning process itself moves through all five ROMA phases, hence embodying the entire cycle.



ROMA and the Org standards the framework and guidance for community action agency's to achieve not only their community goals but the three national community action network goals. The National Community Action Network Goals reflect what Community Action Agencies hope to achieve over a long-term period for individual, families and communities of low-income. Goals incorporated into LIFT's Strategic Plan are reflective of the National Community Action Network Goals listed below.

NATIONAL COMMUNITY ACTION NETWORK GOALS



ORGANIZATIONAL STANDARDS

CSBG Organizational Standards represent important minimum thresholds to ensure Community Action Agencies have the needed capacity to serve America's communities. The full implementation of the principles and practices articulated in the Organizational Standards assures a consistent and strong CSBG network. Below are the Organizational Standards set forth under the CSBG Act which mandates the required components of the strategic planning process and reinforces the need to assess internal functioning as well as the needs of the communities we serve. The goals and objectives, within this Strategic Plan, are reflective of the agency's future in conjunction with the requirements of the Organizational Standards.

Primary Org Standards for Strategic Planning

- OS 6.1 - The organization has an agency-wide Strategic Plan in place that has been approved by the governing board in the last 5 years.
- OS 6.2 - The approved Strategic Plan addresses the reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low-incomes to become more self-sufficient.
- OS 6.3 - The approved Strategic Plan contains Family, Agency, and/or Community Goals.
- OS 6.4 - Customer Satisfaction and customer input, collected as part of the Community Assessment, is included in the strategic planning process.
- OS 6.5 - The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.

Other Org Standards related to Strategic Planning

- OS 1.1 - The organization demonstrates low-income individuals participation in its activities.
- OS 1.2 - The organization analyzes information collected directly from low-income individuals as part of the community assessment.
- OS 1.3 - The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.
- OS 4.1 - The governing board has reviewed the organizational mission statement within the past 5 years and assured that: 1) the mission addresses poverty and: 2) the organization programs and services are in alignment with the mission.
- OS 4.3 - The organization's Strategic Plan documents the continuous use of the full ROMA cycle. In addition the organizations documents having used the services of a ROMA certified trainer to assist in implementation.
- OS 9.3 - The organization has presented to the governing board for review or action, at least within the past 12 months, an analysis of the agencies outcomes and any operational or strategic program adjustments and improvements identified as necessary.

COMMUNITY NEEDS ASSESSMENT

As part of the planning process key leadership reviewed key findings and results from the 2022 Community Needs Assessment. LIFT's Community Needs Assessment identifies and prioritizes the needs and resources of individuals and families in our service area. Key leadership use this data to design effective, outcome-based programs that strive to alleviate poverty. The analyzed data is summarized below.

Top 3 Prioritized Needs Identified



Housing



Substance Abuse
Services



Economic
Development

506 Surveys Completed	22	community sector
	200	low-income individuals
	11	educational sector
	7	faith-based sector
	5	government sector
	5	private sector
	186	public sector
	238	agency clients
	25	board members
	7	agency volunteers

Poverty Statistics

21.95%	15.1%	12.16%
Service Area	State of Oklahoma	United States

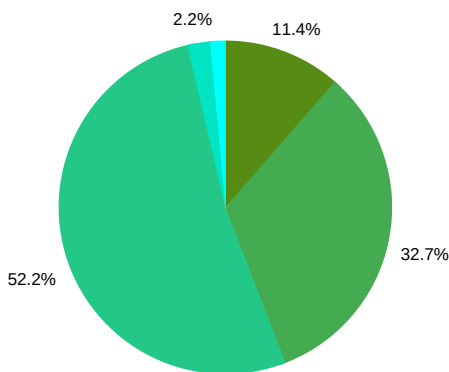
Top 10 Needs Identified

Housing	Youth Services
Early Childhood Services	Senior Services
Emergency Services	Substance Abuse Services
Health Services	Nutrition
Transportation	Asset Development

CUSTOMER SATISFACTION & INPUT

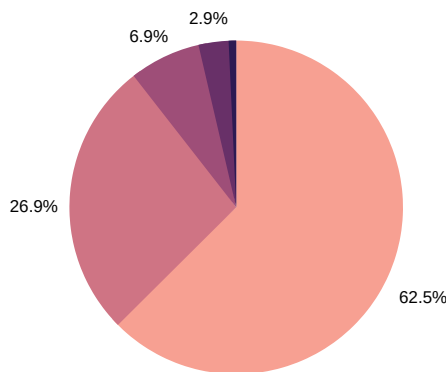
As part of the planning process, the Board reviewed the customer satisfaction data from 2022. Customer Satisfaction data and input is a critical piece to the overall Strategic Plan. The ongoing collection and analysis of customer satisfaction surveys will remain key to LIFT CAA's plan being representative of the full ROMA cycle. Customer Satisfaction surveys are collected on an ongoing basis including paper and online surveys. All surveys are directed to the ROMA Coordinators attention and transferred to an agency database. LIFT's Board of Directors is provided with quarterly updates regarding the number of surveys collected for the reporting period, program and/or programs for which customers completed surveys, responses and percentage of each and analysis of internal and external factors and their actual or potential impact on the survey responses. Results of the 276 Customer Satisfaction Surveys, collected in 2022, were reviewed and analyzed in comparison to the input gathered in the previous phases of the planning process.

County Breakdown



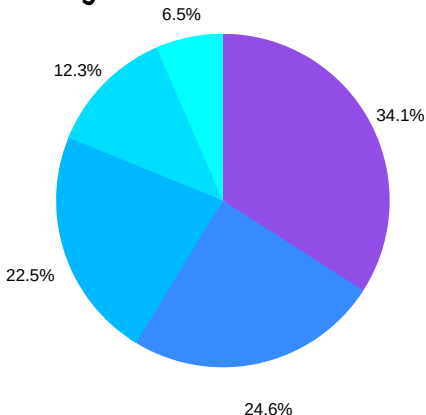
Bryan County - 1.7%
 Choctaw County - 52.2%
 Pushmataha County - 11.4%
 McCurtain County - 32.7%
 Other - 2.0%

Method of Awareness



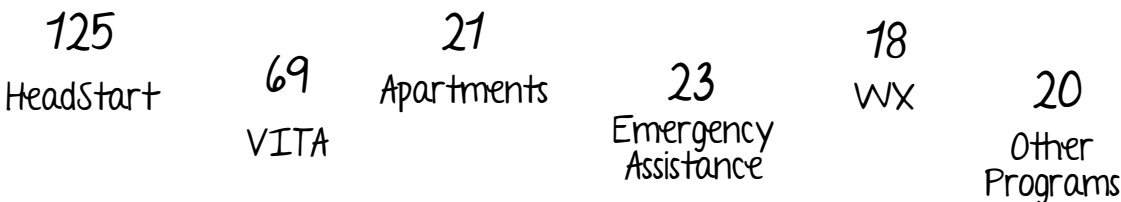
Billboard - .8%
 Friend - 62.5%
 Internet - 6.9%
 Other - 26.9%
 Radio - 2.9%

Age Breakdown



18 to 30 - 34.1%
 31 to 50 - 24.6%
 51 to 65 - 22.5%
 66+ - 12.3%
 18 and under - 6.5%

Surveys Completed by each Program



GOALS & OBJECTIVES

On Thursday, September 22, 2022 key leadership staff enlisted the assistance of Strategic Planning Consultant and Nationally Certified ROMA Trainer – Julia Teska, PhD to determine priorities and establish goals. Collectively the group discussed the conclusions from the 2022 Community Needs Assessment (CNA), Customer Service/Input, Agency Review and SWOT Analysis. The group was asked to provide insight pertaining to the key findings within each of these resources. The group discussed correlations, variances and other factors within these reports. Ultimately, the group developed specific measurable, achievable, relevant and time bound (SMART) goals and objectives which the agency will focus its efforts in order to address the needs of the communities served.

PRIORITY NEEDS

This strategic plan will identify activates and strategies for achieving the goals that align with the needs identified in the 2022 CNA report. The needs represent family, community and agency level needs. The focus of this Strategic Plan will be on program development and its direct relation to improving the lives of low-income individuals.

Need One: Our community has a need for increased safe, decent and affordable housing.

Need Two: Our community has a need for additional substance use/abuse resources and supportive services.

Need Three: Our community has a need for community and economic development opportunities to improve our local economy.

Need Four: Our agency has a need to increase capacity to better serve the needs of our community.



Goal 1: Family

To increase housing and housing supportive services for residents in our service area.

Goal 2: Community

Reduce substance use and abuse and improve community awareness.

Goal 3: Community

To improve our local economy and help families move towards self-sufficiency.

Goal 4: Agency

To increase our capacity to better serve individuals and families of low-income.

#1 HOUSING Our community has a need for increased safe, decent and affordable housing.

Goal To increase housing and housing supportive services for residents in our service area.

Objective 1

Increase number of new single and multifamily housing units.

Objective 2

Increase number of families receiving housing preservation.

Objective 3

Increase lending resources for mortgage loans.

Strategies

Measures & Benchmarks

Objective 1: Increase number of new single and multifamily housing units.

- Submit grant applications for housing opportunities.(single family/multi-family)
- strengthen relationships and partnerships with other housing entities.
- Help families become loan eligible.

- Submit one federal application each year for housing construction funding.
- Construct 3 multi-family units by December 2025.
- Create and/or Strengthen partnerships/MOU's with 2 housing entities by December 2024.
- Provide Housing Counseling to 200 families annually by the end of each calendar year.

Objective 2: Increase number of families receiving housing preservation.

- Provide housing weatherization for families of low-income.
- Assist families with obtaining minor/moderate housing rehab.
- Provide housing education on maintenance and preservation of homes.

- Weatherize 36 homes annually during each calendar year.
- Package 10 504 loans/grants annually during each calendar year.
- Provide housing maintenance/preservation to 30 families annually during each calendar year.

Objective 3: Increase lending resources for mortgage loans.

- Provide T&MA to non traditional lenders.
- Assist lenders in making application for CDFI certification.
- Assist lenders with locating funding resources.

- LIFT Board, loan and housing staff provide 12 T&MA trainings to SOCDC Board by December 31 2023 and ongoing as needed.
- LIFT loan officer assist SOCDC in applying for CDFI certification.
- Transfer/sale existing LIFT mortgage loans to SOCDC by June 30 2024.
- SOCDC secures 1 Angel investor by December 2024.
- SOCDC CDFI fully operational by December 2025.

#2 Substance Abuse

Our community has a need for additional substance use/abuse resources and supportive services.

Goal Reduce substance use and abuse and improve community awareness.

Objective 1

Increase community resources and access to substance use/abuse information and services.

Objective 2

Establish and strengthen partnerships and collaborations in the community.

Objective 3

Provide education and case management to individuals and families impacted by substance use/abuse.

Strategies

Objective 1: Increase community resources and access to substance use/abuse information and services.

- Encourage partners to share information.
- Create informational flyers/brochures with facts of substance use/abuse.
- Utilize social media and other platforms to share information.

Objective 2: Establish and strengthen partnerships and collaborations in the community.

- Attend various community organizations meetings and explain purpose
- Provide education of services and programs to organizations to promote awareness
- Increase organization participation

Objective 3: Provide education & case management to individuals/families impacted by substance use/abuse.

- Provide case management.
- Partner with law enforcement to gain access to inmates and other at risk individuals.
- Collaborate with area schools to host drug prevention events

Measures & Benchmarks

- Community based organizations collaborate with LIFT on 5 events annually each calendar year.
- 500 informational flyers/brochures distributed to residents annually each calendar year. .
- Share information and promote 10 events in local papers, social media and radio annually each calendar year.

- Three additional LIFT Employees serve on county coalitions annually each calendar year.
- Conduct 6 awareness events at schools, jails and/or other community venues annually during each calendar year.
- Collaborate with community based organizations to conduct three events that address substance use/abuse annually each calendar year

- Provide case management to 250 individuals through second chance by December 2024.
- Provide life skills education classes to 15 inmates annually each calendar year.
- Provide 500 youth with prevention awareness information annually each calendar year.

#3 Economic Development

Our community has a need for community and economic development opportunities to improve our local economy.

Goal To improve our local economy and help families move towards self-sufficiency.

Objective 1

Increase tourism activities to promote local economy.

Objective 2

Improve local tourist facilities.

Objective 3

Increase and improve recreational amenities.

Strategies

Measures & Benchmarks

Objective 1: Increase tourism activities to promote local economy.

- Plan and host events.
- Partner with community stakeholders.
- Promote area attractions.

- Hold 4 recreational events at LIFT operated parks annually each calendar year.
- Create 1 tourist planning committee representative of multiple organizations by December 2024.
- Use social media to Promote 9 local tourist attractions annually each calendar year.

Objective 2: Improve local tourist facilities.

- Secure funding for cabin/hospitality house improvements.
- Partner with local community stakeholders.

- Rehab 4 house keeping cabins at Hugo Lake by December 31 2025.
- Complete renovations at hospitality house by December 31 2024.
- Secure donations from 5 local organizations/businesses by December 31 2025.

Objective 3: Increase and improve recreational amenities.

- Make improvements at Hugo Lake Marina.
- Repair infrastructure at Hugo Lake Park
- Increase amenities at Hugo Lake Park

- Replace/repair walkway leading to marina at Hugo Lake by December 31 2023
- Repair boat ramps and pavilions at 3 locations in Hugo Lake Park by December 31 2024
- Construct playground at Hugo Lake Park by December 31 2025

#4 Agency Growth

Our agency has a need to increase capacity to better serve the needs of our community.

Goal

To increase our capacity to better serve individuals and families of low-income.

Objective 1

Improve employee satisfaction to reduce turnover

Objective 2

Increase employee capacity for enhanced service provision

Objective 3

Increase annual budget to address community needs

Strategies

Measures & Benchmarks

Objective 1: Improve employee satisfaction to reduce turnover

- Employee appreciation events.
- Improve working environment.
- Stress reduction activities.

- Recognize 12 outstanding employees annually each calendar year.
- Supervisors and staff participate in 1 EDI training quarterly during each calendar year.
- LIFT office locations plan and carryout 1 stress reduction activity monthly each calendar year.

Objective 2: Increase employee capacity for enhanced service provision

- Attend trainings/conferences.
- Participate in webinars.
- Staff attend leadership meetings.

- 10 employees attend 2 trainings/conferences annually each calendar year.
- 250 employees participate in weekly webinars/teams meetings annually each calendar year.
- 20 Program Directors attend 4 Program Directors meetings annually each calendar year.
- Satisfaction levels from CSS will increase by 10% year over year.

Objective 3: Increase annual budget and other resources to address community needs

- Seek funding opportunities.
- Increase revenues.
- Implement new accounting and HR cloud base software.

- Secure one new grant for new program start up or expansion of existing program annually each calendar year.
- Agency program revenue increase by 5% by December 31 2025. (Baseline \$22,483,114.)
- Netsuite accounting and HR software fully operational by December 31, 2024.

PLAN IMPLEMENTATION & ACCOUNTABILITY

LIFT CAA's Board approved 2023-2025 Strategic Plan will be shared with all program staff to ensure awareness of the key goals and objectives outlined in the Strategic Plan. The plan will be available on the agency's website and distributed to all staff via email.

The Strategic Plan will be implemented by program staff and leadership with direction and guidance from LIFT CAA's Board of Directors. Community Partners, funders and other stakeholders will also be key to plan implementation.

Leadership staff, led by LCAA's Executive Director, will align program plans and budgets with the strategic plan and will devote time each quarter to review implementation progress and progress made toward achieving the goals outlined in this plan. Quarterly reviews will provide opportunities to address any challenges or barriers faced towards achieving program-respective objectives. This will help encourage staff accountability.

LIFT's Board of Directors will be provided with updates on progress towards achieving objectives outlined in the Strategic Plan no less than once a year.

This process of analysis and evaluation will allow programs the chance to make revisions as necessary based upon current community conditions.

CONCLUSIONS

The goals and objectives identified in LCAA's 2023 - 2025 Strategic Plan align with the needs identified in the 2022-2024 Community Needs Assessment. These prioritized needs include Housing, Substance use/Abuse Services, and Community & Economic Development Activities. This Strategic Plan represents input from all stakeholders including residents, front line staff, leadership and key partners. As a living document, this plan requires a strong commitment by all to act on the goals, monitor the implementation and evaluate effectiveness. Internal and external communication is critical to effectively execute the strategies identified. The implementation strategies require focus and attention from senior leadership and all employees involved to ensure the needs are addressed and progress is made.

LIFT PROGRAMS & SERVICES

Child & Adult Care Food Program
Court Appointed Special Advocates
Drug Free Communities Support Program
Early Head Start
Early Head Start - Child Care
Early Learning Centers
Emergency Services:

- Rent
- Utility
- Food Assistance

Head Start

Healthy Start

Help Me Grow Oklahoma

Housing Preservation

Housing Supportive Services:

- Credit Counseling
- Financial Capability
- Homebuyer Education
- Housing Counseling
- Home Equity Conversion Mortgage Counseling

Lending:

- Business
- Residential

Multi-Family Housing:

- Apartments
- Senior Supportive Housing (HUD 202)

Retired Senior Volunteer Program

Rx for Oklahoma

Safe Place Healing Hearts Program

Second Chance Adult Re-entry

Self-Help Housing

Technical & Management Assistance

Tourism:

- Clayton Lake State Park
- Hugo Lake Park
- Raymond Gary State Park

Transportation:

- Local, in-demand
- Sooner-Ride (non emergency medical transportation)

Tri-County Opioid Response Project

Victim Advocacy Services

Volunteer Income Tax Preparation

Weatherization

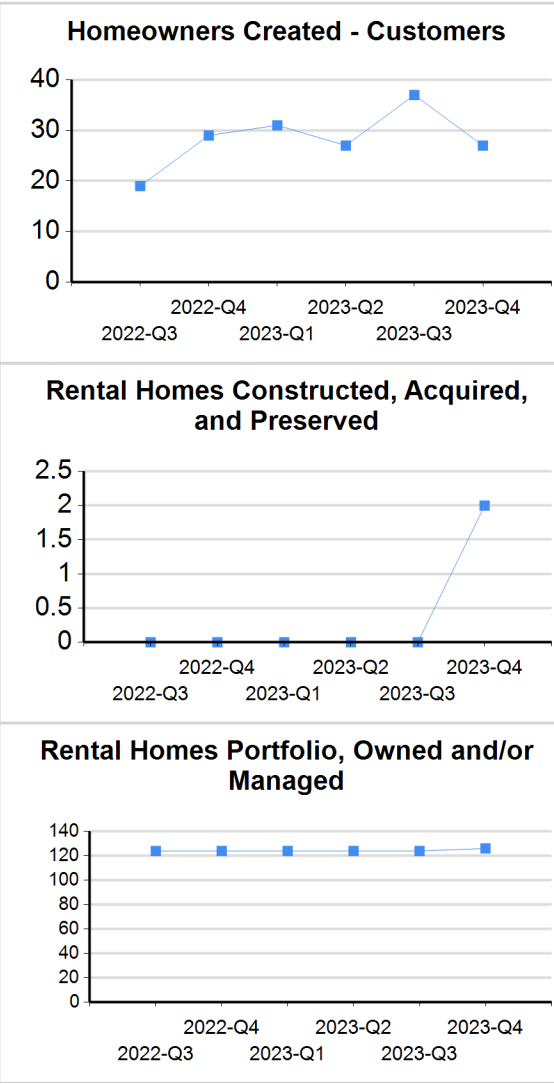
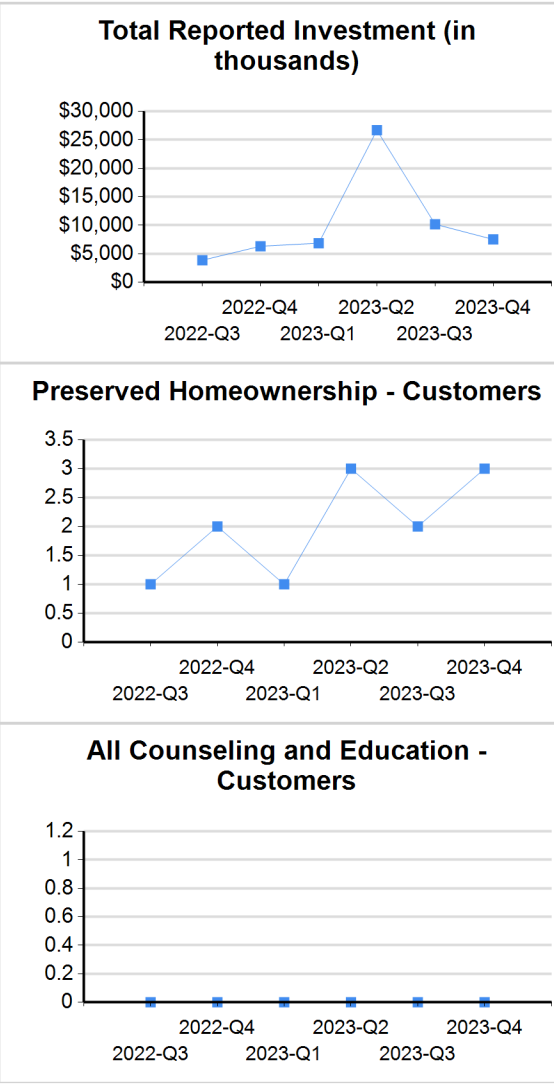
YouthBuild



Quarterly Production Summary Report

July 1 - September 30 2023

Total Reported Investment	\$7,506,207.54
Homeowners Created - Customers	27
Preserved Homeownership - Customers	3
Rental Homes Constructed, Acquired, and Preserved	2
Created and Preserved Homes and Customers	32
Owner Occupied Repairs - Homes	5
Rental Homes, Repaired	0
Total Repaired - Homes	5
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	0
Foreclosure Mitigation Counseling Intake - Customers	0
Financial Capability - Customers	
Rental Homes Portfolio, Owned and/or Managed	126



'Total Reported Investment' and 'Created and Preserved Homes and Customers' are the two measures that NeighborWorks America uses to demonstrate and evaluate the strength and impact of network organizations.

Quarterly Production Summary Report
July 1 - September 30 2023

8251 - LIFT Community Action Agency
Midwest Region

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	\$0.00	\$0.00	\$999,447.00	\$1,102,600.00	\$4,055,920.79	\$6,157,967.79
Homes	0	0	5	6	16	27
Customers	0	0	5	6	16	27

	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	\$17,408.75	\$0.00	\$0.00	\$0.00	\$0.00	\$17,408.75
Homes	3	0	0	0	0	3
Customers	3	0	0	0	0	3

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	\$6,809.00	\$979,018.00	\$0.00	\$259,997.00	\$0.00	\$0.00	\$0.00	\$77,968.00	\$0.00	\$7,039.00	\$0.00
Homes	5	* 5	0	2	0	0					

*Units reported under For-Sale Homes Developed do not count towards Total Production, Investment does count toward Total Investment.

Quarterly Production Summary Report

July 1 - September 30 2023

8251 - LIFT Community Action Agency

Midwest Region

III. Rental Homes Portfolio	
a. Owned	126
b. Managed not Owned	0
c. Number of units covered by project-based rental assistance program	0
d. Number of units covered by tenant-based rental assistance program	60

IV. Commercial Development Portfolio	
Number of Projects	0
Square Footage	0
Shared Equity and Cooperative Housing Portfolio	
Community Land Trust	0
Deed-Restricted Homeownership	0
Limited Equity Cooperative	0

V. Group Education Customers	
a. Completed financial literacy workshop; including home affordability; budgeting and understanding use of credit	0
b. Completed predatory lending; loan scam or other fraud prevention workshop	0
c. Completed fair housing workshop	0
d. Completed homelessness prevention workshop	0
e. Completed rental workshop	0
f. Completed pre-purchase homebuyer education workshop	0
g. Completed non-delinquency post-purchase workshop; including home maintenance and/or financial management for homeowners	0
h. Completed resolving or preventing mortgage delinquency workshop	0
i. Completed disaster preparedness assistance workshop	0
j. Completed disaster recovery assistance workshop	0
Total Group Education	0

VI. Counseling Results - Customers					
Preserved Homeownership, Foreclosure Mitigation - Customers		Foreclosure Mitigation Counseling, Home Not Retained - Customers		Individual Counseling - Services	
a. Mortgage refinanced	0	a. Executed a deed-in-lieu	0	a. Homeless Assistance	0
b. Brought mortgage current	0	b. Sold property/chose alternative housing solution	0	b. Rental Topics	0
c. Mortgage modified	0	c. Pre-foreclosure sale	0	c. Pre-purchase/Homebuying	0
d. Received second mortgage	0	d. Mortgage Foreclosed	0	d. Non-Delinquency Post-Purchase	0
e. Initiated forbearance agreement/repayment plan	0	e. Bankruptcy	0	e. Reverse Mortgage	0
f. Obtained partial claim loan from FHA lender	0	f. Entered debt management	0	f. Resolving or Preventing Forward Mortgage Delinquency or Default	0
Preserved Homeownership, Foreclosure Mitigation - Customers (Total)	0	g. Counseled and referred for legal assistance	0	g. Resolving or Preventing Reverse Mortgage Delinquency or Default	0
		h. Other (final result not listed above)	0	h. Disaster Preparedness Assistance	0
		Foreclosure Mitigation Counseling, Home Not Retained - Customers (Total)	0	i. Disaster Recovery Assistance	0
				Total Counseling Services	0

Quarterly Production Summary Report
July 1 - September 30 2023

VII. Revolving Loan Fund (RLF), Excluding Forgivable and Deferred

First Mortgages		Subordinate Mortgages		Revolving Loan Fund (RLF), Non Amortized	
a. Total outstanding number of RLF loans	5	j. Total outstanding number of RLF loans	0	a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total outstanding value RLF loans	\$337,212.00	k. Total outstanding value of RLF loans	\$0.00	b. Total value of outstanding non-amortized loans (excluding forgivable)	\$0.00
c. Number currently 30-59 days delinquent	1	l. Number currently 30-59 days delinquent	0		
d. Value currently 30-59 days delinquent	\$141,241.00	m. Value currently 30-59 days delinquent	\$0.00		
e. Number currently 60-89 days delinquent	0	n. Number currently 60-89 days delinquent	0		
f. Value currently 60-89 days delinquent	\$0.00	o. Value currently 60-89 days delinquent	\$0.00		
g. Number currently 90 days or more delinquent	1	p. Number currently 90 days or more delinquent	0		
h. Value currently 90 days or more delinquent	\$16,708.00	q. Value currently 90 days or more delinquent	\$0.00		
i. Delinquency Rate (90 days or more)	4.95 %	i. Delinquency Rate (90 days or more)	0.00 %		

IX. Volunteers	
Volunteer Hours	8,740

X. Home Ownership Customers: Education and Counseling Hours

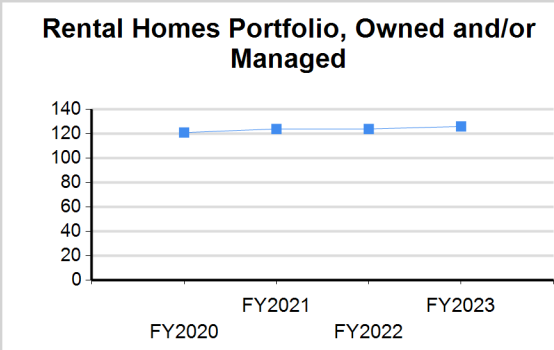
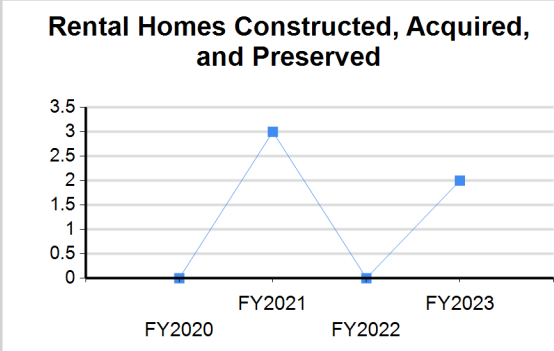
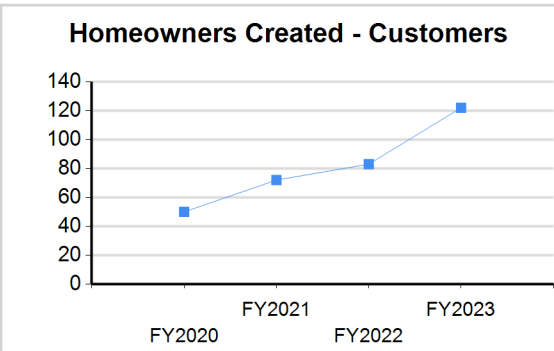
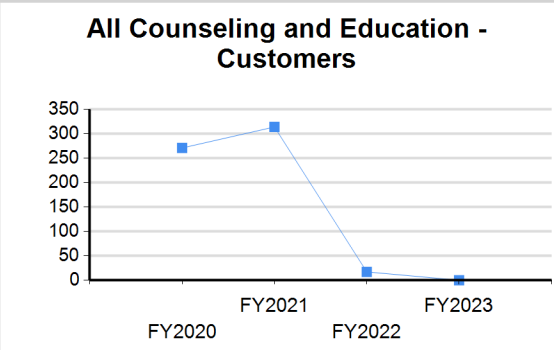
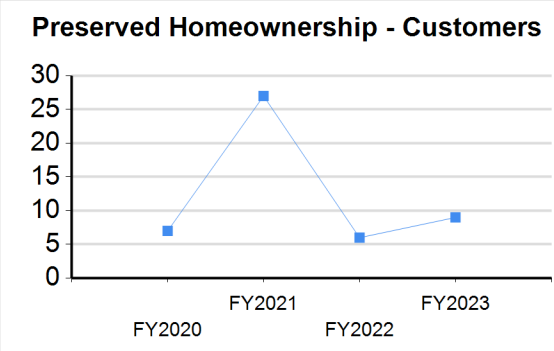
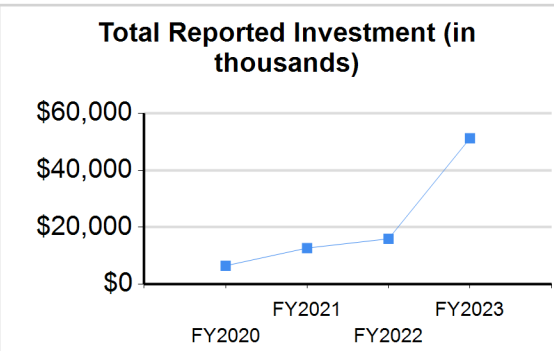
0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	27	100.00 %

YTD Production Summary Report

October 1 - September 30 2023

Total Reported Investment	\$51,246,564.61
Homeowners Created - Customers	122
Preserved Homeownership - Customers	9
Rental Homes Constructed, Acquired, and Preserved	2
Created and Preserved Homes and Customers	133
Owner Occupied Repairs - Homes	11
Rental Homes, Repaired	0
Total Repaired - Homes	11
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	0
Foreclosure Mitigation Counseling Intake - Customers	0
Financial Capability - Customers	
Rental Homes Portfolio, Owned and/or Managed	126

Production Goals	FY 2022 Projections	FY 2023 Projections
Homeownership Promotion Clients	65	70
Homeownership Preservation Clients	15	10
Rental Units Developed	7	5
Rental Units Preserved	0	0



YTD Production Summary Report
October 1 - September 30 2023

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	\$0.00	\$0.00	\$1,713,037.00	\$13,767,856.81	\$11,971,106.79	\$27,452,000.60
Homes	0	0	9	66	47	122
Customers	0	0	9	66	47	122

	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	\$46,429.01	\$0.00	\$0.00	\$0.00	\$0.00	\$46,429.01
Homes	9	0	0	0	0	9
Customers	9	0	0	0	0	9

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	\$14,013.00	\$23,279,242.00	\$0.00	\$259,997.00	\$0.00	\$0.00	\$0.00	\$142,285.00	\$0.00	\$52,598.00	\$0.00
Homes	11	* 110	0	2	0	0					

*Units reported under For-Sale Homes Developed do not count towards Total Production, Investment does count toward Total Investment.

YTD Production Summary Report

October 1 - September 30 2023

8251 - LIFT Community Action Agency

Midwest Region

III. Rental Homes Portfolio	
a. Owned	126
b. Managed not Owned	0
c. Number of units covered by project-based rental assistance program	0
d. Number of units covered by tenant-based rental assistance program	60

IV. Commercial Development Portfolio	
Number of Projects	0
Square Footage	0
Shared Equity and Cooperative Housing Portfolio	
Community Land Trust	0
Deed-Restricted Homeownership	0
Limited Equity Cooperative	0

V. Group Education Customers	
a. Completed financial literacy workshop; including home affordability; budgeting and understanding use of credit	0
b. Completed predatory lending; loan scam or other fraud prevention workshop	0
c. Completed fair housing workshop	0
d. Completed homelessness prevention workshop	0
e. Completed rental workshop	0
f. Completed pre-purchase homebuyer education workshop	0
g. Completed non-delinquency post-purchase workshop; including home maintenance and/or financial management for homeowners	0
h. Completed resolving or preventing mortgage delinquency workshop	0
i. Completed disaster preparedness assistance workshop	0
j. Completed disaster recovery assistance workshop	0
Total Group Education	0

VI. Counseling Results - Customers			
Preserved Homeownership, Foreclosure Mitigation - Customers		Foreclosure Mitigation Counseling, Home Not Retained - Customers	
a. Mortgage refinanced	0	a. Executed a deed-in-lieu	0
b. Brought mortgage current	0	b. Sold property/chose alternative housing solution	0
c. Mortgage modified	0	c. Pre-foreclosure sale	0
d. Received second mortgage	0	d. Mortgage Foreclosed	0
e. Initiated forbearance agreement/repayment plan	0	e. Bankruptcy	0
f. Obtained partial claim loan from FHA lender	0	f. Entered debt management	0
Preserved Homeownership, Foreclosure Mitigation - Customers (Total)	0	g. Counseled and referred for legal assistance	0
		h. Other (final result not listed above)	0
		Foreclosure Mitigation Counseling, Home Not Retained - Customers (Total)	0
Individual Counseling - Services			
a. Homeless Assistance		0	
b. Rental Topics		0	
c. Pre-purchase/Homebuying		0	
d. Non-Delinquency Post-Purchase		0	
e. Reverse Mortgage		0	
f. Resolving or Preventing Forward Mortgage Delinquency or Default		0	
g. Resolving or Preventing Reverse Mortgage Delinquency or Default		0	
h. Disaster Preparedness Assistance		0	
i. Disaster Recovery Assistance		0	
Total Counseling Services		0	

VII. Revolving Loan Fund (RLF), Excluding Forgivable and Deferred

First Mortgages		Subordinate Mortgages		Revolving Loan Fund (RLF), Non Amortized	
a. Total outstanding number of RLF loans	5	j. Total outstanding number of RLF loans	0	a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total outstanding value RLF loans	\$337,212.00	k. Total outstanding value of RLF loans	\$0.00	b. Total value of outstanding non-amortized loans (excluding forgivable)	\$0.00
c. Number currently 30-59 days delinquent	1	l. Number currently 30-59 days delinquent	0		
d. Value currently 30-59 days delinquent	\$141,241.00	m. Value currently 30-59 days delinquent	\$0.00		
e. Number currently 60-89 days delinquent	0	n. Number currently 60-89 days delinquent	0		
f. Value currently 60-89 days delinquent	\$0.00	o. Value currently 60-89 days delinquent	\$0.00		
g. Number currently 90 days or more delinquent	1	p. Number currently 90 days or more delinquent	0		
h. Value currently 90 days or more delinquent	\$16,708.00	q. Value currently 90 days or more delinquent	\$0.00		
i. Delinquency Rate (90 days or more)	4.95 %	i. Delinquency Rate (90 days or more)	0.00 %		

VIII. Inventory For-Sale / Days on the Market

Inventory For-Sale Homes		Days on the Market for For-Sale Homes in Inventory	
Units Held in Portfolio at End of Quarter	0	For sale less than 120 days	0
Units moved to rental portfolio or lease purchase program	0	For sale between 120-180 days	0
# of Unimproved Owned Buildings	0	For sale greater than 180 days	0
# of Owned Undeveloped Lot	0		
# of Units Under Construction	0		
# of Units Sold	0		

IX. Volunteers

Volunteer Hours	26,532
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X. Home Ownership Customers: Education and Counseling Hours

0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	122	100.00 %



Office of Head Start - Program Information Report (PIR) Summary Report - 2023 - Grant Level

For a summary of the filters selected to generate this report, please see the last page of this document.

A. PROGRAM INFORMATION

GENERAL INFORMATION

<i>Program Types</i>	<i># Programs</i>
Total	2
Head Start	1
Early Head Start	1
Migrant and Seasonal Head Start	0
Migrant and Seasonal Early Head Start	0
AIAN Head Start	0
AIAN Early Head Start	0

<i>Agency Types</i>	<i># Programs</i>
Community Action Agency (CAA)	2
Government Agency (Non-CAA)	0
Charter School	0
Private/Public For-Profit (e.g., for-profit hospitals)	0
Private/Public Non-Profit (Non-CAA) (e.g., church or non-profit hospital)	0
School System	0
Tribal Government or Consortium (American Indian/Alaska Native)	0

<i>Agency Descriptions</i>	<i># Programs</i>
Delegate agency	0
Grantee that delegates all of its programs; it operates no programs directly and maintains no central office staff	0
Grantee that directly operates program(s) and has no delegates	2
Grantee that directly operates programs and delegates service delivery	0
Grantee that maintains central office staff only and operates no program(s) directly	0

FUNDED ENROLLMENT

Funded enrollment by funding source

<i>Funded enrollment by funding source</i>	<i># of children / pregnant women</i>
A.1 Funded Enrollment	435
a. Head Start/Early Head Start Funded Enrollment, as identified on the NOA that captures the greatest part of the program year	435
b. Funded Enrollment from non-federal sources, i.e., state, local, private	0
c. Funded Enrollment from the MIECHV Grant Program using the Early Head Start home visiting model	0

Funded enrollment by program option

<i>Funded enrollment by program option</i>	<i># of slots</i>
A.2 Center-based option	
a. Number of slots equal to or greater than 1,020 annual hours for Head Start preschool children or 1,380 annual hours for Early Head Start infants and toddlers	435
1. Of these, the number that are available for the full-working-day and full-calendar-year	435
b. Number of slots with fewer than 1,020 annual hours for Head Start preschool children or 1,380 annual hours for Early Head Start infants and toddlers	0
1. Of these, the number that are available for 3.5 hours per day for 128 days	0
2. Of these, the number that are available for a full working day	0
A.3 Home-based option	0
A.4 Family child care option	0
A.5 Locally designed option	0
	<i># of pregnant women slots</i>
A.6 Pregnant women slots	0

Funded slots at child care partner

<i>Funded slots at child care partner</i>	<i># of slots</i>
A.7 Total number of slots in the center-based or locally designed option	435
a. Of these, the total number of slots at a child care partner	0
A.8 Total funded enrollment at child care partners (includes center-based, locally designed, and family child care program options)	

CLASSES IN CENTER-BASED

<i>Classes</i>	<i># of classes</i>
A.9 Total number of center-based classes operated	35
a. Of these, the number of double session classes	0

CUMULATIVE ENROLLMENT

Children by age

<i>A.10 Children by age:</i>	<i># of children at enrollment</i>
a. Under 1 year	23
b. 1 year old	21
c. 2 years old	63
d. 3 years old	159
e. 4 years old	118
f. 5 years and older	0

Pregnant women (EHS programs)

<i>Pregnant women (EHS programs)</i>	<i># of pregnant women</i>
A.11 Cumulative enrollment of pregnant women	0

Total cumulative enrollment

<i>Total cumulative enrollment</i>	<i># of children / pregnant women</i>
Total cumulative enrollment	384
Children	384
HS Children	306
EHS Children	78
Preschool Children - (HS all ages) and (MSHS age 3-5)	306
Infants and Toddlers - (EHS all ages) and (MSHS age 0-2)	78

Primary type of eligibility

<i>A.13 Report each enrollee only once by primary type of eligibility:</i>	<i># of children / pregnant women</i>
a. Income at or below 100% of federal poverty line	156
b. Public assistance (TANF, SSI, and SNAP)	125
c. Foster care	8
d. Homeless	1
e. Eligibility based on other type of need, but not counted in A.13.a through d	81
f. Incomes between 100% and 130% of the federal poverty line, but not counted in A.13.a through e	13

Prior enrollment

<i>A.15 Enrolled in Head Start or Early Head Start for:</i>	<i># of children</i>
a. The second year	111
b. Three or more years	32

Transition and turnover (HS programs)

<i>Transition and turnover</i>	<i># of children</i>
A.16 Total number of preschool children who left the program any time after classes or home visits began and did not re-enroll	52
a. Of the preschool children who left the program during the program year, the number of preschool children who were enrolled less than 45 days	12

<i>Transition and turnover</i>	<i># of preschool children</i>
A.17 Of the number of preschool children enrolled in Head Start at the end of the current enrollment year, the number projected to be entering kindergarten in the following school year	94

Transition and turnover (EHS programs)

<i>Transition and turnover</i>	<i># of children</i>
A.18 Total number of infants and toddlers who left the program any time after classes or home visits began and did not re-enroll	31
a. Of the infants and toddlers who left the program above, the number of infants and toddlers who were enrolled less than 45 days	13
b. Of the infants and toddlers who left the program during the program year, the number who aged out of Early Head Start	19
1. Of the infants and toddlers who aged out of Early Head Start, the number who entered a Head Start program	4

<i>Transition and turnover</i>	<i># of children</i>
2. Of the infants and toddlers who aged out of Early Head Start, the number who entered another early childhood program	15
3. Of the infants and toddlers who aged out of Early Head Start, the number who did not enter another early childhood program	0

<i>Transition and turnover</i>	<i># of pregnant women</i>
A.19 Total number of pregnant women who left the program after receiving Early Head Start services but before the birth of their infant, and did not re-enroll	0
A.20 Number of pregnant women receiving Early Head Start services at the time their infant was born	0
a. Of the pregnant women enrolled when their infant was born, the number whose infant was subsequently enrolled in the program	0
b. Of the pregnant women enrolled when their infant was born, the number whose infant was not subsequently enrolled in the program	0

Attendance

	<i># of children</i>
A.22 The total number of children cumulatively enrolled in the center-based or family child care program option	384
a. Of these children, the number of children that were chronically absent	265
1. Of the children chronically absent, the number that stayed enrolled until the end of enrollment	197

Child care subsidy

<i>Child care subsidy</i>	<i># of children</i>
A.24 The number of enrolled children for whom the program and/or its partners received a child care subsidy during the program year	0

Ethnicity and race

A.25 Ethnicity and Race:	<i># of Hispanic or Latino Origin children / pregnant women</i>	<i># of Non-Hispanic or Non-Latino Origin children / pregnant women</i>
a. American Indian or Alaska Native	8	76
b. Asian	1	0
c. Black or African American	3	52
d. Native Hawaiian or other Pacific Islander	0	0
e. White	26	162
f. Bi-racial/Multi-racial	9	36
g. Other	3	0
	<i># of children / pregnant women</i>	
h. Unspecified ethnicity or race	8	

Primary language of family at home

A.26 Primary language of family at home:	# of children / pregnant women
a. English	377
1. Of these, the number of children acquiring/learning another language in addition to English	4
b. Spanish	7
c. Native Central American, South American & Mexican Languages	0
d. Caribbean Languages	0
e. Middle Eastern & South Asian Languages	0
f. East Asian Languages	0
g. Native North American/Alaska Native Languages	0
h. Pacific Island Languages	0
i. European & Slavic Languages	0
j. African Languages	0
k. American Sign Language	0
l. Other	0
m. Unspecified	0

Dual language learners

	# of children
A.27 Total number of Dual Language Learners	11

Transportation

	# of children
A.28 Number of children for whom transportation is provided to and from classes	3

B. PROGRAM STAFF & QUALIFICATIONS

TOTAL STAFF

Staff by type

	(1) # of Head Start or Early Head Start staff	(2) # of contracted staff
B.1 Total number of staff members, regardless of the funding source for their salary or number of hours worked	148	0
a. the number who are current or former Head Start or Early Head Start parents	58	0

TOTAL VOLUNTEERS

Volunteers by type

	# of volunteers
B.2 Number of persons providing any volunteer services to the program during the program year	744
a. Of these, the number who are current or former Head Start or Early Head Start parents	692

EDUCATION AND CHILD DEVELOPMENT STAFF

Preschool classroom and assistant teachers (HS and Migrant programs)

	(1) # of classroom teachers	(2) # of assistant teachers
B.3 Total number of preschool education and child development staff by position	28	28
<i>Of the number of preschool education and child development staff by position, the number with the following:</i>		
a. An advanced degree in:		
1. Early childhood education 2. Any field and coursework equivalent to a major relating to early childhood education, with experience teaching preschool-age children	2	0
b. A baccalaureate degree in one of the following:		
1. Early childhood education 2. Any field and coursework equivalent to a major relating to early childhood education with experience teaching preschool-age children or 3. Any field and is part of the Teach for America program and passed a rigorous early childhood content exam	17	0
c. An associate degree in one of the following:		
1. Early childhood education 2. A field related to early childhood education and coursework equivalent to a major relating to early childhood education with experience teaching preschool-age children	6	2
d. A Child Development Associate (CDA) credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements	3	15
1. Of these, a CDA credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements and that is appropriate to the option in which they are working	3	15
e. None of the qualifications listed in B.3.a through B.3.d	0	11

Preschool classroom teachers program enrollment

	# of classroom teachers
B.4 Total number of preschool classroom teachers that do not meet qualifications listed in B.3.a or B.3.b	9
a. Of these preschool classroom teachers, the number enrolled in a degree program that would meet the qualifications described in B.3.a or B.3.b	0

Preschool classroom assistant teachers program enrollment

	# of assistant teachers
B.5 Total number of preschool assistant teachers that do not have any qualifications listed in B.3.a through B.3.d	11
a. Of these preschool assistant teachers, the number enrolled in a degree, certification, credential, or licensure program that would meet one of the qualifications listed in B.3.a through B.3.d.	11

EDUCATION AND CHILD DEVELOPMENT STAFF

Infant and toddler classroom teachers (EHS and Migrant programs)

	# of classroom teachers
B.6 Total number of infant and toddler classroom teachers	15
<i>Of the number of infant and toddler classroom teachers, the number with the following:</i>	
a. An advanced degree in:	
1. Early childhood education with a focus on infant and toddler development or 2. Any field and coursework equivalent to a major relating to early childhood education, with experience teaching infants and/or toddlers	0
b. A baccalaureate degree in:	
1. Early childhood education with a focus on infant and toddler development or 2. Any field and coursework equivalent to a major relating to early childhood education, with experience teaching infants and/or toddlers	2
c. An associate degree in:	
1. Early childhood education with a focus on infant and toddler development or 2. A field related to early childhood education and coursework equivalent to a major relating to early childhood education with experience teaching infants and/or toddlers	2
d. A Child Development Associate (CDA) credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements	8
1. Of these, a CDA credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements and that is appropriate to the option in which they are working	8
e. None of the qualifications listed in B.6.a through B.6.d	3

	# of classroom teachers
B.7 Total number of infant and toddler classroom teachers that do not have any qualifications listed above	3
a. Of these infant and toddler classroom teachers, the number enrolled in a degree, certification, credential, or licensure program that would meet one of the qualifications listed above	3

Home visitors and family child care provider staff qualifications

	# of home visitors
B.8 Total number of home visitors	0
a. Of these, the number of home visitors that have a home-based CDA credential or comparable credential, or equivalent coursework as part of an associate's, baccalaureate, or advanced degree	0
b. Of these, the number of home visitors that do not meet one of the qualifications described in B.8.a.	0
1. Of the home visitors in B.8.b, the number enrolled in a degree or credential program that would meet a qualification described in B.8.a.	0

	# of family child care providers
B.9 Total number of family child care providers	0
a. Of these, the number of family child care providers that have a Family Child Care CDA credential or state equivalent, or an associate, baccalaureate, or advanced degree in child development or early childhood education	0
b. Of these, the number of family child care providers that do not meet one of the qualifications described in B.9.a.	0
1. Of the family child care providers in B.9.b, the number enrolled in a degree or credential program that would meet a qualification described in B.9.a.	0

	# of child development specialists
B.10 Total number of child development specialists that support family child care providers	0
a. Of these, the number of child development specialists that have a baccalaureate degree in child development, early childhood education, or a related field	0
b. Of these, the number of child development specialists that do not meet one of the qualifications described in B.10.a.	0
1. Of the child development specialists in B.10.b, the number enrolled in a degree or credential program that would meet a qualification described in B.10.a.	0

Ethnicity and race

B.13 Race and Ethnicity	(1) # of hispanic or latino origin non-supervisory child development staff	(2) # of non-hispanic or non-latino origin non-supervisory child development staff
a. American Indian or Alaska Native	0	15
b. Asian	0	0
c. Black or African American	0	4
d. Native Hawaiian or other Pacific Islander	0	1
e. White	0	48
f. Biracial/Multi-racial	0	3
g. Other	0	0

	# of non-supervisory education and child development staff
h. Unspecified ethnicity or race	0

Language

	# of non-supervisory and child development staff
B.14 The number who are proficient in a language(s) other than English.	3
a. Of these, the number who are proficient in more than one language other than English	0

B.15 Language groups in which staff are proficient:	# of non-supervisory and child development staff
a. Spanish	0
b. Native Central American, South American, and Mexican Languages	0
c. Caribbean Languages	0
d. Middle Eastern and South Asian Languages	0
e. East Asian Languages	0
f. Native North American/Alaska Native Languages	0
g. Pacific Island Languages	1
h. European and Slavic Languages	1
i. African Languages	0
j. American Sign Language	1
k. Other	0
l. Unspecified	0

STAFF TURNOVER

All staff turnover

	(1) # of Head Start or Early Head Start staff	(2) # of contracted staff
B.16 Total number of staff who left during the program year (including turnover that occurred while the program was not in session, e.g., summer months)	28	0
a. Of these, the number who were replaced	15	0

Education and child development staff turnover

	# of staff
B.17 The number of teachers, preschool assistant teachers, family child care providers, and home visitors who left during the program year (including turnover that occurred while classes and home visits were not in session, e.g., during summer months)	20
a. Of these, the number who were replaced	12
b. Of these, the number who left while classes and home visits were in session	13
c. Of these, the number that were teachers who left the program	9
B.18 Of the number of education and child development staff that left, the number that left for the following primary reason:	# of staff
a. Higher compensation	20
1. Of these, the number that moved to state pre-k or other early childhood program	0
b. Retirement or relocation	0
c. Involuntary separation	0
d. Other (e.g., change in job field, reason not provided)	0
B.19 Number of vacancies during the program year that remained unfilled for a period of 3 months or longer	4

C. CHILD & FAMILY SERVICES

HEALTH SERVICES

Health insurance – Children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.1 Number of all children with health insurance	375	374
a. Number enrolled in Medicaid and/or CHIP	334	334
b. Number enrolled in state-only funded insurance (for example, medically indigent insurance), private insurance, or other health insurance	41	40
C.2 Number of children with no health insurance	9	10

Health insurance - pregnant women (EHS programs)

	(1) # of pregnant women at enrollment	(2) # of pregnant women at end of enrollment
C.3 Number of pregnant women with at least one type of health insurance	0	0
a. Number enrolled in Medicaid	0	0
b. Number enrolled in state-only funded insurance (for example, medically indigent insurance), private insurance, or other health insurance	0	0

	(1) # of pregnant women at enrollment	(2) # of pregnant women at end of enrollment
C.4 Number of pregnant women with no health insurance	0	0

Accessible health care - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.5 Number of children with an ongoing source of continuous, accessible health care provided by a health care professional that maintains the child's ongoing health record and is not primarily a source of emergency or urgent care	368	368
a. Of these, the number of children that have accessible health care through a federally qualified Health Center, Indian Health Service, Tribal and/or Urban Indian Health Program facility	31	31

Accessible health care - pregnant women (EHS Programs)

	(1) # of pregnant women at enrollment	(2) # of pregnant women at end of enrollment
C.6 Number of pregnant women with an ongoing source of continuous, accessible health care provided by a health care professional that maintains their ongoing health record and is not primarily a source of emergency or urgent care	0	0

Medical services – children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.7 Number of children who are up-to-date on a schedule of age-appropriate preventive and primary health care, according to the relevant state's EPSDT schedule for well child care	91	175

	# of children
C.8. Number of children diagnosed with any chronic condition by a health care professional, regardless of when the condition was first diagnosed	9
a. Of these, the number who received medical treatment for their diagnosed chronic health condition	2
b. Specify the primary reason that children with any chronic condition diagnosed by a health care professional did not receive medical treatment:	# of children
1. No medical treatment needed	0
2. No health insurance	0
3. Parents did not keep/make appointment	0
4. Children left the program before their appointment date	0
5. Appointment is scheduled for future date	0
6. Other	0

C.9 Number of children diagnosed by a health care professional with the following chronic condition, regardless of when the condition was first diagnosed:	# of children
a. Autism spectrum disorder (ASD)	4
b. Attention deficit hyperactivity disorder (ADHD)	0
c. Asthma	8
d. Seizures	2
e. Life-threatening allergies (e.g., food allergies, bee stings, and medication allergies that may result in systemic anaphylaxis)	7
f. Hearing Problems	0
g. Vision Problems	1
h. Blood lead level test with elevated lead levels >5 g/dL	0
i. Diabetes	0

Body Mass Index (BMI) - children (HS and Migrant programs)

C.10 Number of children who are in the following weight categories according to the 2000 CDC BMI-for-age growth charts	# of children at enrollment
a. Underweight (BMI less than 5th percentile for child's age and sex)	28
b. Healthy weight (at or above 5th percentile and below 85th percentile for child's age and sex)	196
c. Overweight (BMI at or above 85th percentile and below 95th percentile for child's age and sex)	37
d. Obese (BMI at or above 95th percentile for child's age and sex)	45

Immunization services - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.11 Number of children who have been determined by a health care professional to be up-to-date on all immunizations appropriate for their age	371	371
C.12 Number of children who have been determined by a health care professional to have received all immunizations possible at this time but who have not received all immunizations appropriate for their age	0	0
C.13 Number of children who meet their state's guidelines for an exemption from immunizations	4	4

Medical services – pregnant women (EHS programs)

C.14 Indicate the number of pregnant women who received the following services while enrolled in EHS:	# of pregnant women
a. Prenatal health care	0
b. Postpartum health care	0
c. A professional oral health assessment, examination, and/or treatment	0
d. Mental health interventions and follow-up	0
e. Education on fetal development	0
f. Education on the benefits of breastfeeding	0
g. Education on the importance of nutrition	0
h. Education on infant care and safe sleep practices	0
i. Education on the risks of alcohol, drugs, and/or smoking	0
j. Facilitating access to substance abuse treatment (i.e., alcohol, drugs, and/or smoking)	0

Prenatal health – pregnant women (EHS programs)

C.15 Trimester of pregnancy in which the pregnant women served were enrolled:	# of pregnant women
a. 1st trimester (0-3 months)	0
b. 2nd trimester (3-6 months)	0
c. 3rd trimester (6-9 months)	0
C.16 Of the total served, the number whose pregnancies were identified as medically high risk by a physician or health care provider	0

Oral health

Accessible dental care - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.17 Number of children with continuous, accessible dental care provided by an oral health care professional which includes access to preventive care and dental treatment	369	369

Preschool dental services (HS and Migrant programs)

	# of children at end of enrollment
C.18 Number of children who received preventive care during the program year	281
C.19 Number of all children, including those enrolled in Medicaid or CHIP, who have completed a professional dental examination during the program year	222
a. Of these, the number of children diagnosed as needing dental treatment during the program year - at end of enrollment	23
1. Of these, the number of children who have received or are receiving dental treatment - at end of enrollment	17
b. Specify the primary reason that children who needed dental treatment did not receive it:	# of children
1. Health insurance doesn't cover dental treatment	0
2. No dental care available in local area	0
3. Medicaid not accepted by dentist	0
4. Dentists in the area do not treat 3 – 5 year old children	0
5. Parents did not keep/make appointment	0
6. Children left the program before their appointment date	1
7. Appointment is scheduled for future date	4
8. No transportation	0
9. Other	1

Infant and toddler preventive dental services (EHS and Migrant programs)

	# of children at end of enrollment
C.20 Number of all children who are up-to-date according to the dental periodicity schedule in the relevant state's EPSDT schedule	55

Mental health consultation

	# of staff
C.21 Total number of classroom teachers, home visitors, and family child care providers	43
a. Indicate the number of classroom teachers, home visitors, and family child care providers who received assistance from a mental health consultant through observation and consultation	43

DISABILITIES SERVICES

IDEA eligibility determination

	# of children
C.22 The total number of children referred for an evaluation to determine eligibility under the Individuals with Disabilities Education Act (IDEA) during the program year	41
a. Of these, the number who received an evaluation to determine IDEA eligibility	35
1. Of the children that received an evaluation, the number that were diagnosed with a disability under IDEA	29
2. Of the children that received an evaluation, the number that were not diagnosed with a disability under IDEA	6
1. Of these children, the number for which the program is still providing or facilitating individualized services and supports such as an individual learning plan or supports described under Section 504 of the Rehabilitation Act.	0
b. Of these, the number who did not receive an evaluation to determine IDEA eligibility	6

C.23 Specify the primary reason that children referred for an evaluation to determine IDEA eligibility did not receive it:	# of children
a. The responsible agency assigned child to Response to Intervention (RTI)	0
b. Parent(s) refused evaluation	0
c. Evaluation is pending and not yet completed by responsible agency	1
d. Other	3

Preschool disabilities services (HS and Migrant programs)

	# of children
C.24 Number of children enrolled in the program who had an Individualized Education Program (IEP), at any time during the program year, indicating they were determined eligible by the LEA to receive special education and related services under the IDEA	53
a. Of these, the number who were determined eligible to receive special education and related services:	
1. Prior to this program year	27
2. During this program year	26
b. Of these, the number who have not received special education and related services	0

Infant and toddler part C early intervention services (EHS and Migrant programs)

	# of children
C.25 Number of children enrolled in the program who had an Individualized Family Service Plan (IFSP), at any time during the program year, indicating they were determined eligible by the Part C Agency to receive early intervention services under the IDEA	3
a. Of these, the number who were determined eligible to receive early intervention services:	
1. Prior to this program year	1
2. During this enrollment year	2
b. Of these, the number who have not received early intervention services under IDEA	0

Preschool primary disabilities (HS and Migrant programs)

C.26 Diagnosed primary disability	(1) # of children determined to have this disability	(2) # of children receiving special services
a. Health impairment	1	1
b. Emotional disturbance	0	0
c. Speech or language impairments	2	2
d. Intellectual disabilities	0	0
e. Hearing impairment, including deafness	0	0
f. Orthopedic impairment	0	0
g. Visual impairment, including blindness	0	0
h. Specific learning disability	0	0
i. Autism	0	0
j. Traumatic brain injury	0	0
k. Non-categorical/developmental delay	48	48
l. Multiple disabilities (excluding deaf-blind)	2	2
m. Deaf-blind	0	0

EDUCATION AND DEVELOPMENT TOOLS/APPROACHES

Screening

	# of children
C.27 Number of all newly enrolled children since last year's PIR was reported	213
C.28 Number of all newly enrolled children who completed required screenings within 45 days for developmental, sensory, and behavioral concerns since last year's PIR was reported	225
a. Of these, the number identified as needing follow-up assessment or formal evaluation to determine if the child has a disability	0

Classroom and home visit observation tools

	# of programs
C.32 Does the program routinely use classroom or home visit observation tools to assess quality?	2
C.33 Programs using classroom and home visit observation tools	
a. Center-based settings	2

FAMILY AND COMMUNITY PARTNERSHIPS

Number of families

	# of families at enrollment
C.34 Total number of families:	350
a. Of these, the number of two-parent families	137
b. Of these, the number of single-parent families	213

C.35 Of the total number of families, the number in which the parent/guardian figures are best described as:	# of families at enrollment
a. Parent(s) (e.g., biological, adoptive, stepparents)	329
1. Of these, the number of families with a mother only (biological, adoptive, stepmother)	186
2. Of these, the number of families with a father only (biological, adoptive, stepfather)	17
b. Grandparents	10
c. Relative(s) other than grandparents	3
d. Foster parent(s) not including relatives	6
e. Other	2

Parent/guardian education

C.36 Of the total number of families, the highest level of education obtained by the child's parent(s) / guardian(s):	# of families at enrollment
a. An advanced degree or baccalaureate degree	134
b. An associate degree, vocational school, or some college	21
c. A high school graduate or GED	179
d. Less than high school graduate	15

Employment, Job Training, and School

C.37 Total number of families in which:	# of families at enrollment
a. At least one parent/guardian is employed, in job training, or in school at enrollment	269
1. Of these families, the number in which one or more parent/guardian is employed	268
2. Of these families, the number in which one or more parent/guardian is in job training (e.g., job training program, professional certificate, apprenticeship, or occupational license)	3
3. Of these families, the number in which one or more parent/guardian is in school (e.g., GED, associate degree, baccalaureate, or advanced degree)	1
b. Neither/No parent/guardian is employed, in job training, or in school at enrollment (e.g., unemployed, retired, or disabled)	73

C.38 Total number of families in which:	# of families at end of enrollment
a. At least one parent/guardian is employed, in job training, or in school at end of enrollment	263
1. Of these families, the number of families that were also counted in C.37.a (as having been employed, in job training, or in school at enrollment)	263
2. Of these families, the number of families that were also counted in C.37.b (as having not been employed, in job training, or in school at enrollment)	0
b. Neither/No parent/guardian is employed, in job training, or in school at end of enrollment (e.g., unemployed, retired, or disabled)	70
1. Of these families, the number of families that were also counted in C.37.a	1
2. Of these families, the number of families that were also counted in C.37.b	70

C.39 Total number of families in which:	# of families at enrollment
a. At least one parent/guardian is a member of the United States military on active duty	6
b. At least one parent/guardian is a veteran of the United States military	16

Federal or other assistance

	# of families at enrollment	# of families at end of enrollment
C.40 Total number of families receiving any cash benefits or other services under the Federal Temporary Assistance to Needy Families (TANF) Program	9	9
C.41 Total number of families receiving Supplemental Security Income (SSI)	21	21
C.42 Total number of families receiving services under the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	204	203
C.43 Total number of families receiving benefits under the Supplemental Nutrition Assistance Program (SNAP), formerly referred to as Food Stamps	187	186

Family services

C.44 The number of families that received the following program service to promote family outcomes:	# of families
a. Emergency/crisis intervention (e.g., meeting immediate needs for food, clothing, or shelter)	252
b. Housing assistance (e.g., subsidies, utilities, repairs)	55
c. Asset building services (e.g., financial education, debt counseling)	273
d. Mental health services	275
e. Substance misuse prevention	0
f. Substance misuse treatment	0
g. English as a Second Language (ESL) training	1
h. Assistance in enrolling into an education or job training program	91
i. Research-based parenting curriculum	283
j. Involvement in discussing their child's screening and assessment results and their child's progress	266
k. Supporting transitions between programs (i.e., EHS to HS, HS to kindergarten)	281
l. Education on preventive medical and oral health	278
m. Education on health and developmental consequences of tobacco product use	229
n. Education on nutrition	287
o. Education on postpartum care (e.g., breastfeeding support)	3
p. Education on relationship/marriage	1
q. Assistance to families of incarcerated individuals	3
C.45 Of these, the number of families who were counted in at least one of the services listed above	295

Father engagement

C.46 Number of fathers/father figures who were engaged in the following activities during this program year:	# of father/ father figures
a. Family assessment	5
b. Family goal setting	4
c. Involvement in child's Head Start child development experiences (e.g., home visits, parent-teacher conferences, etc.)	4
d. Head Start program governance, such as participation in the Policy Council or policy committees	12
e. Parenting education workshops	1

Homelessness services

	# of families
C.47 Total number of families experiencing homelessness that were served during the enrollment year	0
	# of children
C.48 Total number of children experiencing homelessness that were served during the enrollment year	0
	# of families
C.49 Total number of families experiencing homelessness that acquired housing during the enrollment year	0

Foster care and child welfare

	# of children
C.50 Total number of enrolled children who were in foster care at any point during the program year	14
C.51 Total number of enrolled children who were referred to Head Start/Early Head Start services by a child welfare agency	1

D. GRANT LEVEL QUESTIONS

INTENSIVE COACHING

	# of education and child development staff
D.1 The number of education and child development staff (i.e., teachers, preschool assistant teachers, home visitors, family child care providers) that received intensive coaching	7
	# of coaches
D.2 The number of individuals that provided intensive coaching, whether by staff, consultants, or through partnership	2

EDUCATION MANAGEMENT STAFF QUALIFICATIONS

	# of education managers/coordinators
D.4 Total number of education managers/coordinators	3
a. Of these, the number of education manager/coordinators with a baccalaureate or advanced degree in early childhood education or a baccalaureate or advanced degree and equivalent coursework in early childhood education with early education teaching experience	3
b. Of these, the number of education manager/coordinators that do not meet one of the qualifications in D.4.a	0
1. Of the education manager/coordinators in D.4.b, the number enrolled in a program that would meet a qualification described in D.4.a	0

FAMILY SERVICES STAFF QUALIFICATIONS

	# of family services staff
D.5 Total number of family services staff:	6
a. Of these, the number that have a credential, certification, associate, baccalaureate, or advanced degree in social work, human services, family services, counseling, or a related field	6
b. Of these, the number that do not meet one of the qualifications described in D.5.a	0
1. Of the family services staff in D.5.b, the number enrolled in a degree or credential program that would meet a qualification described in D.5.a.	0

	<i># of family services staff</i>
2. Of the family services staff in D.5.b, the number hired before November 7, 2016	0

FORMAL AGREEMENTS FOR COLLABORATION

	<i># of partners or agencies</i>
D.6 Total number of child care partners in which a formal agreement was in effect	24
D.7 Total number of LEAs in the service area	24
a. Of these, the total number of LEAs in which a formal agreement was in effect to coordinate services for children with disabilities	23
b. Of these, the total number of LEAs in which a formal agreement was in effect to coordinate transition services	24
D.8 Total number of Part C agencies in the service area	1
a. Of these, the total number of Part C agencies in which a formal agreement was in effect to coordinate services for children with disabilities	1

Report Filters

<i>Filter Name</i>	<i>Filter Value</i>
Program Year	2023
Program Acronyms	CH, CI, CM, HI, HM, HP
Program Types	HS, EHS, Migrant HS, AIAN HS, AIAN EHS
Grants	06CH010743 - Little Dixie Community Action Agency, Inc.



Office of Head Start - Program Information Report (PIR) Summary Report - 2023 - Grant Level

For a summary of the filters selected to generate this report, please see the last page of this document.

A. PROGRAM INFORMATION

GENERAL INFORMATION

<i>Program Types</i>	<i># Programs</i>
Total	1
Head Start	0
Early Head Start	1
Migrant and Seasonal Head Start	0
Migrant and Seasonal Early Head Start	0
AIAN Head Start	0
AIAN Early Head Start	0

<i>Agency Types</i>	<i># Programs</i>
Community Action Agency (CAA)	1
Government Agency (Non-CAA)	0
Charter School	0
Private/Public For-Profit (e.g., for-profit hospitals)	0
Private/Public Non-Profit (Non-CAA) (e.g., church or non-profit hospital)	0
School System	0
Tribal Government or Consortium (American Indian/Alaska Native)	0

<i>Agency Descriptions</i>	<i># Programs</i>
Delegate agency	0
Grantee that delegates all of its programs; it operates no programs directly and maintains no central office staff	0
Grantee that directly operates program(s) and has no delegates	1
Grantee that directly operates programs and delegates service delivery	0
Grantee that maintains central office staff only and operates no program(s) directly	0

FUNDED ENROLLMENT

Funded enrollment by funding source

<i>Funded enrollment by funding source</i>	<i># of children / pregnant women</i>
A.1 Funded Enrollment	120
a. Head Start/Early Head Start Funded Enrollment, as identified on the NOA that captures the greatest part of the program year	120
b. Funded Enrollment from non-federal sources, i.e., state, local, private	0
c. Funded Enrollment from the MIECHV Grant Program using the Early Head Start home visiting model	0

Funded enrollment by program option

<i>Funded enrollment by program option</i>	<i># of slots</i>
A.2 Center-based option	
a. Number of slots equal to or greater than 1,020 annual hours for Head Start preschool children or 1,380 annual hours for Early Head Start infants and toddlers	120
1. Of these, the number that are available for the full-working-day and full-calendar-year	120
b. Number of slots with fewer than 1,020 annual hours for Head Start preschool children or 1,380 annual hours for Early Head Start infants and toddlers	0
1. Of these, the number that are available for 3.5 hours per day for 128 days	0
2. Of these, the number that are available for a full working day	0
A.3 Home-based option	0
A.4 Family child care option	0
A.5 Locally designed option	0
	<i># of pregnant women slots</i>
A.6 Pregnant women slots	0

Funded slots at child care partner

<i>Funded slots at child care partner</i>	<i># of slots</i>
A.7 Total number of slots in the center-based or locally designed option	120
a. Of these, the total number of slots at a child care partner	0
A.8 Total funded enrollment at child care partners (includes center-based, locally designed, and family child care program options)	

CLASSES IN CENTER-BASED

<i>Classes</i>	<i># of classes</i>
A.9 Total number of center-based classes operated	30
a. Of these, the number of double session classes	0

CUMULATIVE ENROLLMENT

Children by age

<i>A.10 Children by age:</i>	<i># of children at enrollment</i>
a. Under 1 year	52
b. 1 year old	54
c. 2 years old	63
d. 3 years old	18
e. 4 years old	0
f. 5 years and older	0

Pregnant women (EHS programs)

<i>Pregnant women (EHS programs)</i>	<i># of pregnant women</i>
A.11 Cumulative enrollment of pregnant women	0

Total cumulative enrollment

<i>Total cumulative enrollment</i>	<i># of children / pregnant women</i>
Total cumulative enrollment	187
Children	187
EHS Children	187
Infants and Toddlers - (EHS all ages) and (MSHS age 0-2)	187

Primary type of eligibility

<i>A.13 Report each enrollee only once by primary type of eligibility:</i>	<i># of children / pregnant women</i>
a. Income at or below 100% of federal poverty line	87
b. Public assistance (TANF, SSI, and SNAP)	66
c. Foster care	7
d. Homeless	2
e. Eligibility based on other type of need, but not counted in A.13.a through d	17
f. Incomes between 100% and 130% of the federal poverty line, but not counted in A.13.a through e	8

Prior enrollment

<i>A.15 Enrolled in Head Start or Early Head Start for:</i>	<i># of children</i>
a. The second year	52
b. Three or more years	52

Transition and turnover (EHS programs)

<i>Transition and turnover</i>	<i># of children</i>
A.18 Total number of infants and toddlers who left the program any time after classes or home visits began and did not re-enroll	80
a. Of the infants and toddlers who left the program above, the number of infants and toddlers who were enrolled less than 45 days	32
b. Of the infants and toddlers who left the program during the program year, the number who aged out of Early Head Start	46
1. Of the infants and toddlers who aged out of Early Head Start, the number who entered a Head Start program	15
2. Of the infants and toddlers who aged out of Early Head Start, the number who entered another early childhood program	31
3. Of the infants and toddlers who aged out of Early Head Start, the number who did not enter another early childhood program	0

<i>Transition and turnover</i>	<i># of pregnant women</i>
A.19 Total number of pregnant women who left the program after receiving Early Head Start services but before the birth of their infant, and did not re-enroll	0
A.20 Number of pregnant women receiving Early Head Start services at the time their infant was born	0
a. Of the pregnant women enrolled when their infant was born, the number whose infant was subsequently enrolled in the program	0
b. Of the pregnant women enrolled when their infant was born, the number whose infant was not subsequently enrolled in the program	0

Attendance

	# of children
A.22 The total number of children cumulatively enrolled in the center-based or family child care program option	187
a. Of these children, the number of children that were chronically absent	112
1. Of the children chronically absent, the number that stayed enrolled until the end of enrollment	60

Child care subsidy

Child care subsidy	# of children
A.24 The number of enrolled children for whom the program and/or its partners received a child care subsidy during the program year	65

Ethnicity and race

A.25 Ethnicity and Race:	# of Hispanic or Latino Origin children / pregnant women	# of Non-Hispanic or Non-Latino Origin children / pregnant women
a. American Indian or Alaska Native	2	41
b. Asian	0	0
c. Black or African American	5	39
d. Native Hawaiian or other Pacific Islander	0	0
e. White	4	60
f. Bi-racial/Multi-racial	6	30
g. Other	0	0
	# of children / pregnant women	
h. Unspecified ethnicity or race	0	

Primary language of family at home

A.26 Primary language of family at home:	# of children / pregnant women
a. English	187
1. Of these, the number of children acquiring/learning another language in addition to English	1
b. Spanish	0
c. Native Central American, South American & Mexican Languages	0
d. Caribbean Languages	0
e. Middle Eastern & South Asian Languages	0
f. East Asian Languages	0
g. Native North American/Alaska Native Languages	0
h. Pacific Island Languages	0
i. European & Slavic Languages	0
j. African Languages	0
k. American Sign Language	0
l. Other	0
m. Unspecified	0

Dual language learners

	# of children
A.27 Total number of Dual Language Learners	1

Transportation

	# of children
A.28 Number of children for whom transportation is provided to and from classes	0

B. PROGRAM STAFF & QUALIFICATIONS

TOTAL STAFF

Staff by type

	(1) # of Head Start or Early Head Start staff	(2) # of contracted staff
B.1 Total number of staff members, regardless of the funding source for their salary or number of hours worked	45	19
a. the number who are current or former Head Start or Early Head Start parents	15	6

TOTAL VOLUNTEERS

Volunteers by type

	# of volunteers
B.2 Number of persons providing any volunteer services to the program during the program year	68
a. Of these, the number who are current or former Head Start or Early Head Start parents	65

EDUCATION AND CHILD DEVELOPMENT STAFF

Infant and toddler classroom teachers (EHS and Migrant programs)

	# of classroom teachers
B.6 Total number of infant and toddler classroom teachers	30
<i>Of the number of infant and toddler classroom teachers, the number with the following:</i>	
a. An advanced degree in:	
1. Early childhood education with a focus on infant and toddler development or 2. Any field and coursework equivalent to a major relating to early childhood education, with experience teaching infants and/or toddlers	0
b. A baccalaureate degree in:	
1. Early childhood education with a focus on infant and toddler development or 2. Any field and coursework equivalent to a major relating to early childhood education, with experience teaching infants and/or toddlers	1
c. An associate degree in:	
1. Early childhood education with a focus on infant and toddler development or 2. A field related to early childhood education and coursework equivalent to a major relating to early childhood education with experience teaching infants and/or toddlers	2
d. A Child Development Associate (CDA) credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements	15
1. Of these, a CDA credential or state-awarded certification, credential, or licensure that meets or exceeds CDA requirements and that is appropriate to the option in which they are working	15

	# of classroom teachers
e. None of the qualifications listed in B.6.a through B.6.d	12
	# of classroom teachers
B.7 Total number of infant and toddler classroom teachers that do not have any qualifications listed above	12
a. Of these infant and toddler classroom teachers, the number enrolled in a degree, certification, credential, or licensure program that would meet one of the qualifications listed above	12

Home visitors and family child care provider staff qualifications

	# of home visitors
B.8 Total number of home visitors	0
a. Of these, the number of home visitors that have a home-based CDA credential or comparable credential, or equivalent coursework as part of an associate's, baccalaureate, or advanced degree	0
b. Of these, the number of home visitors that do not meet one of the qualifications described in B.8.a.	0
1. Of the home visitors in B.8.b, the number enrolled in a degree or credential program that would meet a qualification described in B.8.a.	0

	# of family child care providers
B.9 Total number of family child care providers	0
a. Of these, the number of family child care providers that have a Family Child Care CDA credential or state equivalent, or an associate, baccalaureate, or advanced degree in child development or early childhood education	0
b. Of these, the number of family child care providers that do not meet one of the qualifications described in B.9.a.	0
1. Of the family child care providers in B.9.b, the number enrolled in a degree or credential program that would meet a qualification described in B.9.a.	0

	# of child development specialists
B.10 Total number of child development specialists that support family child care providers	0
a. Of these, the number of child development specialists that have a baccalaureate degree in child development, early childhood education, or a related field	0
b. Of these, the number of child development specialists that do not meet one of the qualifications described in B.10.a.	0
1. Of the child development specialists in B.10.b, the number enrolled in a degree or credential program that would meet a qualification described in B.10.a.	0

Ethnicity and race

	(1) # of hispanic or latino origin non-supervisory child development staff	(2) # of non-hispanic or non-latino origin non-supervisory child development staff
B.13 Race and Ethnicity		

B.13 Race and Ethnicity	(1) # of hispanic or latino origin non-supervisory child development staff	(2) # of non-hispanic or non-latino origin non-supervisory child development staff
a. American Indian or Alaska Native	0	6
b. Asian	0	0
c. Black or African American	0	6
d. Native Hawaiian or other Pacific Islander	0	0
e. White	1	15
f. Biracial/Multi-racial	0	2
g. Other	0	0

	# of non-supervisory education and child development staff
h. Unspecified ethnicity or race	0

Language

	# of non-supervisory and child development staff
B.14 The number who are proficient in a language(s) other than English.	0
a. Of these, the number who are proficient in more than one language other than English	0

B.15 Language groups in which staff are proficient:	# of non-supervisory and child development staff
a. Spanish	0
b. Native Central American, South American, and Mexican Languages	0
c. Caribbean Languages	0
d. Middle Eastern and South Asian Languages	0
e. East Asian Languages	0
f. Native North American/Alaska Native Languages	0
g. Pacific Island Languages	0
h. European and Slavic Languages	0
i. African Languages	0
j. American Sign Language	0
k. Other	0
l. Unspecified	0

STAFF TURNOVER

All staff turnover

	(1) # of Head Start or Early Head Start staff	(2) # of contracted staff
B.16 Total number of staff who left during the program year (including turnover that occurred while the program was not in session, e.g., summer months)	9	10
a. Of these, the number who were replaced	7	10

Education and child development staff turnover

	# of staff
B.17 The number of teachers, preschool assistant teachers, family child care providers, and home visitors who left during the program year (including turnover that occurred while classes and home visits were not in session, e.g., during summer months)	13
a. Of these, the number who were replaced	13
b. Of these, the number who left while classes and home visits were in session	13
c. Of these, the number that were teachers who left the program	13
B.18 Of the number of education and child development staff that left, the number that left for the following primary reason:	# of staff
a. Higher compensation	13
1. Of these, the number that moved to state pre-k or other early childhood program	0
b. Retirement or relocation	0
c. Involuntary separation	0
d. Other (e.g., change in job field, reason not provided)	0
B.19 Number of vacancies during the program year that remained unfilled for a period of 3 months or longer	0

C. CHILD & FAMILY SERVICES

HEALTH SERVICES

Health insurance – Children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.1 Number of all children with health insurance	180	180
a. Number enrolled in Medicaid and/or CHIP	168	168
b. Number enrolled in state-only funded insurance (for example, medically indigent insurance), private insurance, or other health insurance	12	12
C.2 Number of children with no health insurance	7	7

Health insurance - pregnant women (EHS programs)

	(1) # of pregnant women at enrollment	(2) # of pregnant women at end of enrollment
C.3 Number of pregnant women with at least one type of health insurance	0	0
a. Number enrolled in Medicaid	0	0
b. Number enrolled in state-only funded insurance (for example, medically indigent insurance), private insurance, or other health insurance	0	0
C.4 Number of pregnant women with no health insurance	0	0

Accessible health care - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.5 Number of children with an ongoing source of continuous, accessible health care provided by a health care professional that maintains the child's ongoing health record and is not primarily a source of emergency or urgent care	176	175

	(1) # of children at enrollment	(2) # of children at end of enrollment
a. Of these, the number of children that have accessible health care through a federally qualified Health Center, Indian Health Service, Tribal and/or Urban Indian Health Program facility	14	14

Accessible health care - pregnant women (EHS Programs)

	(1) # of pregnant women at enrollment	(2) # of pregnant women at end of enrollment
C.6 Number of pregnant women with an ongoing source of continuous, accessible health care provided by a health care professional that maintains their ongoing health record and is not primarily a source of emergency or urgent care	0	0

Medical services – children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.7 Number of children who are up-to-date on a schedule of age-appropriate preventive and primary health care, according to the relevant state's EPSDT schedule for well child care	41	129

	# of children
C.8. Number of children diagnosed with any chronic condition by a health care professional, regardless of when the condition was first diagnosed	5
a. Of these, the number who received medical treatment for their diagnosed chronic health condition	1
b. Specify the primary reason that children with any chronic condition diagnosed by a health care professional did not receive medical treatment:	# of children
1. No medical treatment needed	0
2. No health insurance	0
3. Parents did not keep/make appointment	0
4. Children left the program before their appointment date	0
5. Appointment is scheduled for future date	0
6. Other	0

	# of children
C.9 Number of children diagnosed by a health care professional with the following chronic condition, regardless of when the condition was first diagnosed:	
a. Autism spectrum disorder (ASD)	6
b. Attention deficit hyperactivity disorder (ADHD)	0
c. Asthma	0
d. Seizures	0
e. Life-threatening allergies (e.g., food allergies, bee stings, and medication allergies that may result in systemic anaphylaxis)	6
f. Hearing Problems	0
g. Vision Problems	0
h. Blood lead level test with elevated lead levels >5 g/dL	0
i. Diabetes	0

Immunization services - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.11 Number of children who have been determined by a health care professional to be up-to-date on all immunizations appropriate for their age	154	158
C.12 Number of children who have been determined by a health care professional to have received all immunizations possible at this time but who have not received all immunizations appropriate for their age	1	0
C.13 Number of children who meet their state's guidelines for an exemption from immunizations	2	2

Medical services – pregnant women (EHS programs)

C.14 Indicate the number of pregnant women who received the following services while enrolled in EHS:	# of pregnant women
a. Prenatal health care	0
b. Postpartum health care	0
c. A professional oral health assessment, examination, and/or treatment	0
d. Mental health interventions and follow-up	0
e. Education on fetal development	0
f. Education on the benefits of breastfeeding	0
g. Education on the importance of nutrition	0
h. Education on infant care and safe sleep practices	0
i. Education on the risks of alcohol, drugs, and/or smoking	0
j. Facilitating access to substance abuse treatment (i.e., alcohol, drugs, and/or smoking)	0

Prenatal health – pregnant women (EHS programs)

C.15 Trimester of pregnancy in which the pregnant women served were enrolled:	# of pregnant women
a. 1st trimester (0-3 months)	0
b. 2nd trimester (3-6 months)	0
c. 3rd trimester (6-9 months)	0
C.16 Of the total served, the number whose pregnancies were identified as medically high risk by a physician or health care provider	0

Oral health

Accessible dental care - children

	(1) # of children at enrollment	(2) # of children at end of enrollment
C.17 Number of children with continuous, accessible dental care provided by an oral health care professional which includes access to preventive care and dental treatment	176	176

Preschool dental services (HS and Migrant programs)

	# of children at end of enrollment
C.18 Number of children who received preventive care during the program year	176
C.19 Number of all children, including those enrolled in Medicaid or CHIP, who have completed a professional dental examination during the program year	91
a. Of these, the number of children diagnosed as needing dental treatment during the program year - at end of enrollment	4
1. Of these, the number of children who have received or are receiving dental treatment - at end of enrollment	4
b. Specify the primary reason that children who needed dental treatment did not receive it:	# of children
1. Health insurance doesn't cover dental treatment	0
2. No dental care available in local area	0
3. Medicaid not accepted by dentist	0
4. Dentists in the area do not treat 3 – 5 year old children	0
5. Parents did not keep/make appointment	0
6. Children left the program before their appointment date	0
7. Appointment is scheduled for future date	0
8. No transportation	0
9. Other	0

Infant and toddler preventive dental services (EHS and Migrant programs)

	# of children at end of enrollment
C.20 Number of all children who are up-to-date according to the dental periodicity schedule in the relevant state's EPSDT schedule	118

Mental health consultation

	# of staff
C.21 Total number of classroom teachers, home visitors, and family child care providers	30
a. Indicate the number of classroom teachers, home visitors, and family child care providers who received assistance from a mental health consultant through observation and consultation	0

DISABILITIES SERVICES

IDEA eligibility determination

	# of children
C.22 The total number of children referred for an evaluation to determine eligibility under the Individuals with Disabilities Education Act (IDEA) during the program year	3
a. Of these, the number who received an evaluation to determine IDEA eligibility	2
1. Of the children that received an evaluation, the number that were diagnosed with a disability under IDEA	2
2. Of the children that received an evaluation, the number that were not diagnosed with a disability under IDEA	0
1. Of these children, the number for which the program is still providing or facilitating individualized services and supports such as an individual learning plan or supports described under Section 504 of the Rehabilitation Act.	0
b. Of these, the number who did not receive an evaluation to determine IDEA eligibility	1

C.23 Specify the primary reason that children referred for an evaluation to determine IDEA eligibility did not receive it:	<i># of children</i>
a. The responsible agency assigned child to Response to Intervention (RTI)	0
b. Parent(s) refused evaluation	1
c. Evaluation is pending and not yet completed by responsible agency	0
d. Other	0

Preschool disabilities services (HS and Migrant programs)

	<i># of children</i>
C.24 Number of children enrolled in the program who had an Individualized Education Program (IEP), at any time during the program year, indicating they were determined eligible by the LEA to receive special education and related services under the IDEA	0
a. Of these, the number who were determined eligible to receive special education and related services:	
1. Prior to this program year	0
2. During this program year	0
b. Of these, the number who have not received special education and related services	0

Infant and toddler part C early intervention services (EHS and Migrant programs)

	<i># of children</i>
C.25 Number of children enrolled in the program who had an Individualized Family Service Plan (IFSP), at any time during the program year, indicating they were determined eligible by the Part C Agency to receive early intervention services under the IDEA	5
a. Of these, the number who were determined eligible to receive early intervention services:	
1. Prior to this program year	3
2. During this enrollment year	2
b. Of these, the number who have not received early intervention services under IDEA	0

EDUCATION AND DEVELOPMENT TOOLS/APPROACHES

Screening

	<i># of children</i>
C.27 Number of all newly enrolled children since last year's PIR was reported	79
C.28 Number of all newly enrolled children who completed required screenings within 45 days for developmental, sensory, and behavioral concerns since last year's PIR was reported	52
a. Of these, the number identified as needing follow-up assessment or formal evaluation to determine if the child has a disability	2

Classroom and home visit observation tools

	<i># of programs</i>
C.32 Does the program routinely use classroom or home visit observation tools to assess quality?	1
C.33 Programs using classroom and home visit observation tools	
a. Center-based settings	1

FAMILY AND COMMUNITY PARTNERSHIPS

Number of families

	# of families at enrollment
C.34 Total number of families:	164
a. Of these, the number of two-parent families	49
b. Of these, the number of single-parent families	115
C.35 Of the total number of families, the number in which the parent/guardian figures are best described as:	# of families at enrollment
a. Parent(s) (e.g., biological, adoptive, stepparents)	149
1. Of these, the number of families with a mother only (biological, adoptive, stepmother)	107
2. Of these, the number of families with a father only (biological, adoptive, stepfather)	2
b. Grandparents	4
c. Relative(s) other than grandparents	5
d. Foster parent(s) not including relatives	4
e. Other	2

Parent/guardian education

C.36 Of the total number of families, the highest level of education obtained by the child's parent(s) / guardian(s):	# of families at enrollment
a. An advanced degree or baccalaureate degree	72
b. An associate degree, vocational school, or some college	9
c. A high school graduate or GED	76
d. Less than high school graduate	7

Employment, Job Training, and School

C.37 Total number of families in which:	# of families at enrollment
a. At least one parent/guardian is employed, in job training, or in school at enrollment	152
1. Of these families, the number in which one or more parent/guardian is employed	150
2. Of these families, the number in which one or more parent/guardian is in job training (e.g., job training program, professional certificate, apprenticeship, or occupational license)	5
3. Of these families, the number in which one or more parent/guardian is in school (e.g., GED, associate degree, baccalaureate, or advanced degree)	3
b. Neither/No parent/guardian is employed, in job training, or in school at enrollment (e.g., unemployed, retired, or disabled)	11
C.38 Total number of families in which:	# of families at end of enrollment
a. At least one parent/guardian is employed, in job training, or in school at end of enrollment	136
1. Of these families, the number of families that were also counted in C.37.a (as having been employed, in job training, or in school at enrollment)	136
2. Of these families, the number of families that were also counted in C.37.b (as having not been employed, in job training, or in school at enrollment)	0
b. Neither/No parent/guardian is employed, in job training, or in school at end of enrollment (e.g., unemployed, retired, or disabled)	6
1. Of these families, the number of families that were also counted in C.37.a	0

C.38 Total number of families in which:	<i># of families at end of enrollment</i>
2. Of these families, the number of families that were also counted in C.37.b	6

C.39 Total number of families in which:	<i># of families at enrollment</i>
a. At least one parent/guardian is a member of the United States military on active duty	1
b. At least one parent/guardian is a veteran of the United States military	4

Federal or other assistance

	<i># of families at enrollment</i>	<i># of families at end of enrollment</i>
C.40 Total number of families receiving any cash benefits or other services under the Federal Temporary Assistance to Needy Families (TANF) Program	10	10
C.41 Total number of families receiving Supplemental Security Income (SSI)	5	5
C.42 Total number of families receiving services under the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	134	134
C.43 Total number of families receiving benefits under the Supplemental Nutrition Assistance Program (SNAP), formerly referred to as Food Stamps	101	102

Family services

C.44 The number of families that received the following program service to promote family outcomes:	<i># of families</i>
a. Emergency/crisis intervention (e.g., meeting immediate needs for food, clothing, or shelter)	61
b. Housing assistance (e.g., subsidies, utilities, repairs)	0
c. Asset building services (e.g., financial education, debt counseling)	59
d. Mental health services	60
e. Substance misuse prevention	0
f. Substance misuse treatment	0
g. English as a Second Language (ESL) training	0
h. Assistance in enrolling into an education or job training program	46
i. Research-based parenting curriculum	59
j. Involvement in discussing their child's screening and assessment results and their child's progress	61
k. Supporting transitions between programs (i.e., EHS to HS, HS to kindergarten)	60
l. Education on preventive medical and oral health	60
m. Education on health and developmental consequences of tobacco product use	19
n. Education on nutrition	60
o. Education on postpartum care (e.g., breastfeeding support)	0
p. Education on relationship/marriage	1
q. Assistance to families of incarcerated individuals	0
C.45 Of these, the number of families who were counted in at least one of the services listed above	61

Father engagement

C.46 Number of fathers/father figures who were engaged in the following activities during this program year:	# of father/ father figures
a. Family assessment	3
b. Family goal setting	3
c. Involvement in child's Head Start child development experiences (e.g., home visits, parent-teacher conferences, etc.)	7
d. Head Start program governance, such as participation in the Policy Council or policy committees	2
e. Parenting education workshops	0

Homelessness services

	# of families
C.47 Total number of families experiencing homelessness that were served during the enrollment year	1
	# of children
C.48 Total number of children experiencing homelessness that were served during the enrollment year	2
	# of families
C.49 Total number of families experiencing homelessness that acquired housing during the enrollment year	0

Foster care and child welfare

	# of children
C.50 Total number of enrolled children who were in foster care at any point during the program year	9
C.51 Total number of enrolled children who were referred to Head Start/Early Head Start services by a child welfare agency	0

D. GRANT LEVEL QUESTIONS

INTENSIVE COACHING

	# of education and child development staff
D.1 The number of education and child development staff (i.e., teachers, preschool assistant teachers, home visitors, family child care providers) that received intensive coaching	29
	# of coaches
D.2 The number of individuals that provided intensive coaching, whether by staff, consultants, or through partnership	2

EDUCATION MANAGEMENT STAFF QUALIFICATIONS

	# of education managers/ coordinators
D.4 Total number of education managers/coordinators	3
a. Of these, the number of education manager/coordinators with a baccalaureate or advanced degree in early childhood education or a baccalaureate or advanced degree and equivalent coursework in early childhood education with early education teaching experience	3

	# of education managers/ coordinators
b. Of these, the number of education manager/coordinators that do not meet one of the qualifications in D.4.a	0
1. Of the education manager/coordinators in D.4.b, the number enrolled in a program that would meet a qualification described in D.4.a	0

FAMILY SERVICES STAFF QUALIFICATIONS

	# of family services staff
D.5 Total number of family services staff:	3
a. Of these, the number that have a credential, certification, associate, baccalaureate, or advanced degree in social work, human services, family services, counseling, or a related field	1
b. Of these, the number that do not meet one of the qualifications described in D.5.a	2
1. Of the family services staff in D.5.b, the number enrolled in a degree or credential program that would meet a qualification described in D.5.a.	2
2. Of the family services staff in D.5.b, the number hired before November 7, 2016	0

FORMAL AGREEMENTS FOR COLLABORATION

	# of partners or agencies
D.6 Total number of child care partners in which a formal agreement was in effect	3
D.7 Total number of LEAs in the service area	0
a. Of these, the total number of LEAs in which a formal agreement was in effect to coordinate services for children with disabilities	0
b. Of these, the total number of LEAs in which a formal agreement was in effect to coordinate transition services	0
D.8 Total number of Part C agencies in the service area	1
a. Of these, the total number of Part C agencies in which a formal agreement was in effect to coordinate services for children with disabilities	1

Report Filters

<i>Filter Name</i>	<i>Filter Value</i>
Program Year	2023
Program Acronyms	CH, CI, CM, HI, HM, HP
Program Types	HS, EHS, Migrant HS, AIAN HS, AIAN EHS
Grants	06HP000312 - Lift Community Action Agency, Inc.

LIFT C.A.A., Inc.
Head Start/Early Head Start/Early Head Start-Child Care
Policy Council
1005 South 5th Street
Hugo, OK 74743

October 17, 2023
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, October 17, 2023 at 10:30 a.m. at 1005 S. 5th Street in Hugo, Oklahoma. Notice of time, place and agenda of meeting was posted within prominent view at 1005 S 5th Street, Hugo, Oklahoma twenty-four (24) hours prior to the meeting.

The meeting was called to order at 10:32 a.m. by Lindsey Kent, Chairperson. A quorum was met. Members present were Key'Osha Jones; Cabbage Patch, Steve Woldanski; Hugo EHS, Lindsey Kent; Idabel III, Lisa Heady, Kara Maness, Consuelo Splawn, and Clinton Crawley; Community Representatives.

HS/EHS/EHS-CC staff present included: Darla Galyon, HS/EHS/EHS-CC Director; Jordan Mack, HS/EHS/EHS-CC Assistant Director; Mattie McKee, HS/EHS/EHS-CC Assistant Director; Ronda Spear, Health Assistant Specialist; Susie Mashburn, Education Specialist; Sommer Springfield, Education Assistant; Sara Moore, Professional Development Specialist; Brittany Bailey, ERSEA Specialist; Brianna Nelson, ERSEA Assistant; Rita Burke, Disability/Mental Health Specialist; Christina Merritt, FCE/Disability/Mental Health Assistant; and Tori Williams, Health Specialist

Consideration, Discussion and Vote to Accept the minutes from the September 19, 2023: Copies of the minutes were provided to the council for review. Kara Maness made a motion to approve the minutes as written, and Clinton Crawley seconded the motion. The motion carried.

Consideration, Discussion and Vote to approve the 2023-2024 Community Representatives: Kara Maness, LIFT Board Member; Consuelo Splawn, LIFT Board Member Alternate; Clinton Crawley, Washington Community Center; Lisa Heady, Choctaw County Library and Patsy Guess, Kiamichi Technology Center. Darla Galyon, HS/EHS/EHS-CC Director explained the roles and responsibilities of the Community Representatives and asked for a motion to approve. Lindsey Kent made a motion to approve and Key'Osha Jones seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Enter into Executive Session to Discuss the employment, transfer, hiring, appointment, promotion, demotion or disciplining of employees: Tatianna Davis-Substitute, Cyriah Ellis-Substitute, Lisa Gamlin-HS/EHS/EHS-CC Program Clerk, Ashlyn Ray- Antlers II Teacher Aide, Inell Spencer-Hugo EHS Cook, Nathan Williams-Valliant Cook, Kelsey Holley-Rattan Special Needs Aide, and Sandra Barcheers from Hugo IV

Teacher Assistant to Hugo II Teacher Assistant, pursuant LIFT, CAA Okla. Stat. title 25§ 307 (b) (1). No motion was made therefore no vote was needed.

Consideration, Discussion, and Vote to Adjourn Out of the Executive Session and the Regular Board Meeting Be Reconvened. Did not enter into Executive Session, therefore no vote was needed.

Consideration, Discussion and Vote to Approve New Hires, Transfers and Terminations Recommended by the Personnel Committee. Kara Maness made a motion to approve and Lisa Heady seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Approve the Submittal of the 2023 Grant application to Potts Family Foundation, Inc.- \$10,000: Darla Galyon, HS/EHS/EHS-CC Director explained that this money will be used for the Raising A Reader program that benefits HS/EHS/EHS-CC children. Lisa Heady made a motion to approve submittal and Steve Woldanski seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Approve the Acceptance of the Head Start/Early Head Start Child and Adult Care Food Program (CACF) Application to Oklahoma Dept. of Education in the amount of \$626,691.33: Darla Galyon, HS/EHS/EHS-CC Director explained to the council these funds will provide an opportunity to be reimbursed for a portion of the costs of meals and snacks served to enrolled children in the 28 Head Start classrooms and three Early Head Start centers. The total requested is an estimate of food, milk, food-related supplies, and cooks' salaries/benefits needed for food service operations under the program. Kara Maness made a motion to approve acceptance and Key'Osha Jones seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Approve the Acceptance of the SFY 2024 Community Action Agencies State Appropriated Head Start Funds for Head Start Award from Oklahoma Dept. Of Commerce- \$83,602: Darla Galyon, HS/EHS/EHS-CC Director explained to the council that these funds go toward Head Start/Early Head Start Teacher Salaries and is a supplement grant for the programs. Lisa Heady made a motion to approve acceptance and Clinton Crawley seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Approve Hiring of Kellogg & Sovereign Consulting, LLC as the E-Rate Consultants for the 2024-2025 E-Rate Funding Year: Mattie McKee, HS/EHS/EHS-CC Assistant Director gave an overview of who Kellogg & Sovereign Consulting are and stated that Kellogg & Sovereign Consulting will file forms, assess needs, prepare & post requests & other duties required in maintaining E-Rate funding. Lisa Heady made a motion to approve and Steve Woldanski seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve Head Start/Early Head Start/EHS-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy: Jordan Mack, HS/EHS/EHS-CC Assistant Director provided copies and reviewed the Policy Council Operating Procedures; the purpose in serving as a link to parents, grantees, public and private organizations and the communities served; the membership, as representatives of Head Start

families and as community representatives; offices duties, including Chairperson, Vice-Chairperson, and Secretary; committees, such as Parent Committees, Grievance Committees, and special committees as needed. Jordan Mack also explained that the Impasse Policy is a conflict resolution policy between the Policy Council and the Governing Board. Kara Maness made a motion to approve and Steve Woldanski seconded the motion. The motion carried.

Policy Council Training: Recognizing and Reporting Child Abuse: Christina Merritt, FCE/Disability Mental Health Assistant presented training on reporting procedures, who is a mandated reporter and a video on signs of child abuse & neglect.

Consideration, Discussion and Vote to accept HS, EHS, EHS-CC, SAF, Community Facilities, OECP, USDA, and Non-Fed August, 2023 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director provided copies and an overview of the August, 2023 financial statements and Credit Card Distribution Report for the Council and it was reviewed and recommend by the Finance Committee to vote for approval. Lisa Heady made a motion to accept and Clinton Crawley seconded the motion. The motion carried.

Presentation of September, 2023 Financial Statements and Credit Card Distribution Reports: Darla Galyon provided a copy and overview of the September, 2023 Financial Statements and Credit Card Distribution Report for review along with an explanation of where non-fed monies come from for members to review and vote on at the November 28, 2023 meeting. Copies will be mailed to members not present.

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey, ERSEA Specialist reported that as of today, 10/17/2023 260 children have been enrolled in the Head Start classrooms. Head Start attendance for August, 2023 was 92.2 %. Early Head Start currently has 43 children enrolled and attendance for August, 2023 was 84.3%. Early Head Start-CC currently has 94 children enrolled and attendance for August, 2023 was 85.4%. Recruitment is on-going and applications are still be accepted and processed.

Governing Board Report: Mattie McKee- Mattie McKee reported the Governing Board met on October 10, 2023 and gave an overview of the agenda, which was attached for review and that all HS/EHS/EHS-CC items were approved.

Data Analysis-Jordan Mack- Jordan Mack gave an overview of the data assessed for September, 2023.

USDA Meals and Snack Report-Jordan Mack, Jordan Mack, HS/EHS/EHS-CC Assistant Director provided a copy and an overview summary of meals and snacks served for September, 2023.

OHS Communications and Guidance-Darla Galyon presented and reviewed all OHS Communications and Guidance received since the last council meeting.

Program Summary Report-Darla Galyon presented the HS/EHS/EHS-CC Program Summary for the council to review.

Consideration, Discussion, and Vote on New Business (Not known about or which could not have been reasonably foreseen prior to time of posting the agenda. Okla. Stat. Title 25 § 311): There was none.

There being no other business to come before the board, Kara Maness made a motion to adjourn and Clinton Crawley seconded the motion. The motion carried and the meeting ended at 11: 05 a.m.

Lindsey Kent-Chairperson
Key'Osha Jones-Vice-Chairperson
Titeuna Mitchell-Secretary



Employee of the Month Nomination

Please place an X beside all of the qualities that apply to the person you are nominating, and then write a few words about how each characteristic applies to the person being nominated.

Example: X --Has good customer service--Mary always smiles and says hi to everyone who comes in the office.

Not all qualities will apply to every person. You may also add additional good qualities that the person has in the "other" blanks on the back side of this form. If you would like to elaborate, you can use the empty square on the second page of this form to provide more details of the good work habits of the person you are nominating. Or, you can use the empty space to describe something really good that the person has done.

Date: Oct 17, 2023

Name of Person being nominated for Employee of the Month: Kristy Priddy

Name of Person submitting the nomination: Susie Mashburn, Sommer Springfield

<u>Yes</u>	Is a hard worker	<u>Kristy definitely is a consistent, dependable employee.</u>
<u>Yes</u>	Respects others	<u>Respect is a characteristic that Kristy models to those around her.</u>
<u>Yes</u>	Is on time	<u>Kristy is prompt and punctual!</u>
<u>Yes</u>	Is organized	<u>Organization is one of Kristy's strengths.</u>
<u>Yes</u>	Keeps a positive attitude	<u>Kristy has a positive attitude in interactions parents, staff, and children.</u>
<u>Yes</u>	Encourages other people	<u>She is an encourager to everyone around her.</u>
<u>Yes</u>	Is willing to help others	<u>She is always available to help during any circumstance.</u>
<u>Yes</u>	Makes a good first impression	<u>She relates well to the families and staff she serves.</u>
<u>Yes</u>	Follows all workplace rules	<u>Kristy understands and complies with all HS Performance Standards.</u>
<u>Yes</u>	Uses resources wisely	<u>Kristy seeks ways to use her resources in a creative way.</u>
<u>Yes</u>	Has good work attendance	<u>She is consistent in her attendance.</u>
<u>Yes</u>	Represents the agency well	<u>She is a good role model for fellow employees.</u>
<u>Yes</u>	Is a loyal employee	<u>She has been a loyal employee for twenty two years.</u>
<u>Yes</u>	Handles crisis well	<u>She is quick to react in a positive and appropriate way.</u>
<u>Yes</u>	Goes above and beyond the call of duty	<u>She definitely goes beyond expectations in all areas of responsibility.</u>
<u>Yes</u>	Works well with others (team player)	<u>Kristy is a leader and works well with her staff.</u>

LIFT Community Action Agency, Inc.
209 North 4th Street, Hugo, OK 74743
Telephone (580) 326-3351 Fax (580) 326-2305
www.liftca.org



Yes Is creative As a teacher, Kristy enjoys learning and sharing creative activities.

Yes Likes to learn new things Kristy is always open to new ideas.

Yes Is a good listener Kristy listens well and uses what she learns in a positive manner.

Yes Communicates well She is attentive to how she comes across in all aspects of the work environment.

Yes Dependable We can always depend on Kristy in all aspects of her position.

Yes Respectful, considerate of others Kristy thinks of others before considering herself.

Yes Safety conscious Kristy is knowledgeable of safety requirements.

Yes Good problem solving skills As director, Kristy has great problem solving skills.

YES Other Kristy is a winner in our Head Start/EHS/EHS-CC world!!

Other _____

Other _____

Use this space if you have anything additional that you would like to say about the person being nominated.

Kristy has worked in Head Start and Early Head Start for twenty two years. She is currently the director of Hugo Early Head Start. She coordinates monthly meetings with staff to ensure a cohesive environment and workplace positivity. Kristy has interactions with parents, ensuring the children's well being and school readiness. Her repoire with families is evident daily as she greets children and parents to the center. She coordinates monthly parent meetings and Dad's Day to encourage parental involvement and to facilitate family/staff relationships.

Kristy steps in as teacher/caregiver of children on numerous occasions when there are staff shortages. She also fills in for the cook when needed. The position as a director of an Early Head Start includes reports, paperwork, licensing requirements, maintenance and upkeep of the facility, purchasing of groceries and supplies, and general oversight and scheduling of three teachers and a cook. She is responsible to see that all staff complete lesson plans, required screenings, classroom organization, Home Visits and Parent Teacher Conferences, teaching and computer programs such as Child Plus, ASQ, and Teaching Strategies Gold. Kristy facilitates enrollment of new students, ensuring that parents understand their responsibilities related to health, immunization, and dental checkups.

Kristy's expertise is evident as she establishes relationships with the children entrusted in her care. Their love for her is evident in their desire to be near and held by her. She responds to their needs and teaches children based on their developmental level.

Submit nominations by the 30th of the month for consideration. Submit nominations to Kathy James at the Administration Office, by mail (209 N. 4th St., Hugo, OK 74743), by fax (580-326-2305), or by email (kathy.james@liftca.org). Nominations are judged by a five-member committee. If the person you nominate is not selected, it is okay to nominate that person again the following month if you feel he/she is deserving of the award.

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Program Summary
Head Start/Early Head Start/Early Head Start-Child Care Programs
November 2023

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of October there were 42 children, age birth to 3, that were provided services in the Early Head Start centers and 95 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 257 children, age 3 to 4 years old in the Head Start centers within the tri-county service area.

The Outreach Specialist prepared and sent out radio ads that reached across our service area. Our ad was included on local restaurant menus. Daily social media posts are also made on our LIFTCA Facebook page.

Family Advocates and other Head Start, Early Head Start, and Early Head Start Child Care staff have been placing recruitment flyers, recruitment apple signs, recruitment cards and other recruitment items in and around various businesses within the tri-county service area, along with placing recruitment items online, to ensure all enrollment opportunities are filled as they occur. Partnering childcare facilities are also actively recruiting children for the program.

Family & Community Engagement

For the Month of August, we had 256 parents that participated in Parent Meetings. Family Advocates are starting goals with families through the Family Partnership Agreements. The centers started inviting parents and community members in to participate in Parent Ready to Read by having a story time with the children; there were 22 participants, with 6 of them being father figures.

Father Involvement

The Dad's Day activities for the month of August were various school bus, scarecrow, animal, and airplane crafts as well as a water relay and the Idabel center did crafts to display at the county fair (where they ended up 2 first place finishes for their age division). For the August Dad's Day, there were 111 people that participated in Dad's Day activities with 68 being father figures. In addition, 51 dads/father figures participated in parent meetings for August. Since the beginning of the 2023-2024 school year, we have had 125 father figures participate in family engagement activities.

Nutrition

In the month of October, the nutrition team completed their first round of CACFP kitchen checks, Head Start 1st round folders checks, EHS & EHS-CC 3rd round folder checks. We were pleased to find there was no findings in our first round of CACFP checks. We are looking to fill, Valliant HS and Antlers Early Head Start cook positions. The nutrition team is starting to dive into the new school year with our new nutrition paperwork, as well as getting the nutritional needs of children situated, we have been continuously tracking our special dietary needs they are growing daily. The red dye 40 has become a very popular issue this school year so far, we have made arrangements for any items containing the red dye ingredient to be removed from that said center along with any other allergies the same precautions are taken.

Health

During the month of October employee Physical tracking continued. ELCCT meeting was held. Most folder checks were completed for HS. We have continued to receive updates for Child Plus immunizations and Physicals received from centers for entry into Child Plus. Two CPR classes was held in October. HS centers were updated on requirements regarding physicals and immunizations due and coming due. Of the 261 children that is currently enrolled in head start only 2 need hearing/vision screens and these are new students. 33 dental are need out of the 261, 44 physicals are needed. 51 lead results are needed out of 261, 65 hemoglobin's are needed out of 261, and 18 children need immunizations. EHS & ELC-CC are ongoing with their health screens and are looking good as well.

Education

As the education specialists, Sommer and I would like to thank parents for their involvement in the lives of children. Many parents volunteer their time to Policy Council, reading to children, Parent Meetings, Dad's Day, etc. Thanksgiving Holidays gave children and teaching staff a much-needed break. We are appreciative of our teaching staff and the effort they put into educating young children. As parents and visitors see the classroom, they may be unaware that staff are responsible for lesson plans, observations/documentations, screenings, family contacts, health, disability, mental health, transition paperwork. Please take time to thank your child's teacher for their devotion in educating children.

Professional Development

During the month of October, the Professional Development Specialist scheduled CPR/First Aid classes taught by LIFT CPR Instructors Tori Williams/Taryn Creasman/Ronda Spear, where several LIFT employees received or renewed their Adult and Infant CPR and First Aid certifications. The Professional Development Specialist also scheduled an ELCCT class in which three newly hired LIFT employees participated.

Professional Development Ladders and Oklahoma Directors Credentials were renewed or received for several employees in October.

In October, the Professional Development Specialist coordinated in-service held at the Hugo Kiamichi Technology Center for Head Start/Early Head Start/Early Head Start – Child-Care staff. The October in-service covered various topics such as the Strategic Plan, Attendance updates, and the required CACFP Civil Rights and Child Abuse Awareness training. Steven Lacy from Oklahoma DHS presented the Child Abuse Awareness training this year. Brandi Elwood from the Oklahoma Warmline presented a very captivating and compelling training on Children's Challenging Behaviors.

The Professional Development Specialist has been busy ensuring that all staff members are on track to meet any education requirements in the proper timeframe. Staff members have been making progress and are on track to be completed within requirement deadlines.

We have been working to ensure all new staff meet requirements for the programs they work for including trainings as well. We strive for excellence and want to make staff as well seasoned and informed as possible.

Disabilities/Mental Health/Transition

Sooner Start has an online process for referrals that goes directly to the Oklahoma State Department of Education. This process has streamlined the referral process. In Early Head Start, two children have an IFSP and 3 others have been referred to Sooner Start through the online process. In the EHS-Child Care program, there are four children that have been identified to receive Sooner Start services and 5 others are in the referral process.

In Head Start for the school year 2023-2024, fifty-five students have been evaluated and have an IEP and will receive special education services from the staff/consultants from the public schools. Sixteen other students have been accepted that have been referred to the public schools for an evaluation to determine eligibility for services.

The Mental Health Consultant and staff provide classroom observations and follow-up activities and resources. Teachers, staff and parents have the opportunity to visit with the Mental Health Consultant while she is in the classroom or other appointments can be made at the discretion of the parents and staff. A classroom written report will be completed by the Mental Health Consultant for each classroom with ideas to share with the parents and staff.

Early Head Start-Child Care Center Staff and the Early Head Start Center staff have been providing transition activities for children ages 2 ½ to 3 years old to promote a smoother transition to the next level. In the month of October, six students have completed transition activities.

Recruitment/Outreach

The following recruitment and outreach strategies/activities were implemented or held during the month of October 2023.

Health Care Provider Outreach

- **Engaging Healthcare Providers and Mental Health Services**

- Throughout the school year, we are always looking for ways to engage health care providers and mental health services and include them in our school readiness and health initiatives, along with ensuring our information is available at their health care facilities. To bring awareness to the importance of oral health in the early childhood years and as way to further bring awareness of our Head Start and Early Head Start programs, we provided youth dental kits to our local health care and mental health providers.



- - Hugo Family Medical Clinic
 - Irvin Medical Clinic

- Choctaw County Health Department
- Kiamichi Family Medical-Hugo
- Kiamichi Family Medical-Battiest
- Brighter Heights Oklahoma Mental Health Services
- Rowland Flatt Clinic-Antlers
- Restore Medical Clinic-Antlers
- Pushmataha County Health Department
- Tawana Duncan Family Dentistry
- Pushmataha Family Medical Clinic-Clayton
- Pushmataha Family Medical Clinic- Boswell
- McCurtain Memorial Hospital
- Shamrock Medical Clinic
- McCurtain County Health Department
- Idabel Childrens Clinic
- Walkup Family Medical
- STAT Clinic
- My Doctor Pediatrics
- Kiamichi Family Medical Clinic- Idabel
- Burgess Family Healthcare
- McCurtain Memorial Clinic in Idabel

Events

- **Shine the Light on Darkness Domestic Violence Event**
 - Provided promotional materials to be distributed at the event



-
- **Pumpkin Festival**
 - Provided promotional materials to be distributed at the event. It was set up at a table with high-traffic and had this informational flyer regarding our program. A QR code was included on the flyer, which provides direct access to an application.



○

- **Drug Take Back Event in McCurtain County**

- Promotional items were provided for the event.



-
- **Fall Festival in Downtown Hugo**

- Set up a booth at the community event. We had several hundred people visit our booth.



-
- **Pushmataha Fall Festival**

- Provided promotional materials to be handed out at the event.



-
- **McCurtain County Community Baby Shower**

- Provided Help Me Grow Developmental Skill Building Kits - included Head Start applications
- Provided early learning books to promote the importance of early literacy
- Head Start/Early Head Start/Early Head Start-Child Care information was included on all marketing incentives



- **LIFT CA HR (Darlene Wood) participated in a job fair in McAlester and Idabel**
 - Head Start/Early Head Start provided information about our sign-on incentives and open positions



Email Outreach

- **Help Me Grow Newsletter**
 - Email blast



Restaurant Menus

- **Red B Restaurant in Idabel requested more Kids Menus.**



Social Media

- **Help Me Grow Facebook Data**
 - Since we are still experiencing issues with our LIFT Head Start/Early Head Start page, we are moving forward with dissemination of information through our Help Me Grow Oklahoma Facebook page, which is an initiative under Head Start to provide family resources to our families. The data shows that we are slowly gaining traction and seeing progress in sharing/liking posts.



- Post Impressions: 3,365

- Post Reach: 2,896
- Engagement: 271



- - Post Impressions: 1,004
 - Post Reach: 909
 - Engagement: 64



- - Post Impressions: 1,505
 - Post Reach: 1,207
 - Engagement: 79



- - Post Impressions: 4,429
 - Post Reach: 4,039
 - Engagement: 220
- **Overall Facebook Data for October**
 - 64 new likes

- 108 new followers
- Facebook Reach: 6,136
- Page and Profile Visits: 772- that is up 404% since the last month
- **LIFT Community Action Facebook Page**
 - The LIFT Community Action Facebook page shared our posts to help spread important information regarding our open positions and enrollment.



Other Outreach

- **Be a Neighbor**
 - We are currently in the process of creating our Be a Neighbor account, through the Oklahoma State Department of Health, to be included on their resource website. Our account has been created and accepted but we are waiting on them to make corrections to the information on our page.
- **Attend monthly coalition/partner meetings**
 - Discussed enrollment, open job positions and engaging healthcare providers
- **Antlers Library**
 - updated flyers and provided more applications
- **Radio Ad**
 - Head Start is Hiring! We are accepting applications for Special Needs Aides in Choctaw, McCurtain and Pushmataha counties. This entry-level position is a great opportunity to gain hands-on experience, with future advancement opportunities in Head Start. The Special Needs Aide will work one-on-one with preschool aged children and is responsible for the care, well-being, safety, and education of a special needs child. The Special Needs Aide assists the Teacher and Teacher Assistant to create and manage a positive, warm and challenging learning environment. We are currently offering a \$1,200 sign-on incentive to join our team as a Special Needs Aide. If you have a passion for working with young children, submit your application today at www.liftca.org. Questions? Call us! 580-326-7581. Again, join our Head Start team by applying at www.liftca.org and click on "careers".
*Incentives will be discussed during the interview process.



Office of Head Start

Explore content posted to the [Early Childhood Learning and Knowledge Center \(ECLKC\)](#) throughout the month of October. These email announcements and resources are helpful for Head Start and Early Head Start programs and other early childhood staff. Find information and tools related to your work with the children and families you support daily. Select the links below to get started. Use the [Español button](#) on each ECLKC page to see its Spanish translation.

News from OHS

- [Biden-Harris Administration Announces Increased Investment in Tribal Colleges and Universities-Head Start Partnership Program](#) (press release)
- [Biden-Harris Administration Announces Nearly \\$3.7B to Help Lower Home Energy Costs, Launches National LIHEAP Eligibility Tool](#) (press release)
- [Child Health and Safety Incident Reporting: FY24 RAN Informational Session](#) (video)
- [Celebrate Head Start Awareness Month in October!](#) (email)
- [Director Garvin Celebrates Head Start Awareness Month 2023](#) (vlog)
- [First Tribal Integration of Title IV-B Child Welfare Programs Into a “477” Plan](#) (press release)
- [Funding School Buses That Reduce Pollution, Save Money, and Protect Health](#) (email)
- [Head Start Work Is Heart Work](#) (email)
- [HHS Awards \\$9.85 Million to Support Domestic Violence and Sexual Assault Victims and Their Children](#) (email)
- [National Head Start Fellows Announced](#) (press release)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- [Biting Behavior in Toddlers and How to Respond](#) (podcast)

Health, Behavioral Health, and Safety

- [Fathers, Families, and Mental Health](#) (video)
- [Health Manager Orientation Guide](#) (email)
 - Available in [Spanish \(español\)](#)
- [Improving Staff Wellness and Job Satisfaction](#) (video)
- [Trauma-informed Strategies for Head Start Programs](#) (video)

Professional Development

- [Professional Development for Education Staff](#) (e-blast)

Program Management and Fiscal Operations

- [Natural Disasters and Head Start Facilities](#)

Newsletters

- [Disabilities Services Newsletter Issue No. 72](#)
- [Resources to Make You Smile! Issue No. 32](#)

- Available in [Spanish \(español\)](#)
- [Sesame Street in Communities Issue No. 25](#)
 - Available in [Spanish \(español\)](#)

[Subscribe now](#) to get all your favorite newsletters direct to your inbox.

Head Start Careers

- [Early Head Start Director](#) *Washington, DC*
- [Head Start AIAN Grantee Specialist](#) *Region XI, remote position*
- [Staff Development Coordinator](#) *Watsonville, CA*

Find more [Head Start program employment opportunities](#) in the ECLKC Job Center.

Upcoming Events for November

- Thursday, Nov. 2
 - [Applying for a CDA® Assessment in Another Language](#)
 - [Crafting Winter Memories: Activities and Recipes](#)
 - [Playful Learning and Joyful Teaching in Preschools](#)
- Tuesday, Nov. 7: [Measuring the Quality of Caregiver–Child Interactions](#)
- Wednesday, Nov. 8
 - [Fall Garden Storytime](#)
 - [Understanding the Foundations of the Home Visitor Role](#)
 - [Health Services Certification Information Session](#)
- Thursday, Nov. 9
 - [The CDA Exam Experience](#)
 - [Reducing Environmental Health Hazards in Early Childhood Settings](#)
 - [GroMoreGood Grant Application Walk-through](#)
 - [MyPeers Orientation](#)
- Tuesday, Nov. 14: [Tackling Challenging Behaviors with Insight](#)
- Wednesday, Nov. 15
 - [Promoting Health and Wellness Through Head Start Partnerships](#)
 - [Coaching to Support Equity, Inclusion, and Belonging](#)
- Thursday, Nov. 16
 - [NHSA and the Zoo in the Classroom: Pre-Math with Cheetahs](#)
 - [Leadership and Planning for LGBTQIA2S+ Inclusivity in Head Start Programs](#)
- Monday, Nov. 27
 - [Infant and Early Childhood Mental Health Consultation National Office Hours](#)
 - [MyPeers Orientation](#)
- Wednesday, Nov. 28–29: [The Future of ERSEA in Head Start Programs](#)
- Thursday, Nov. 29
 - [Social and Emotional Well-being with Sesame Workshop](#)
 - [Framework for Effective Practice Through an Equity Lens \[in Spanish\]](#)

Visit the ECLKC for a full list of [upcoming events](#).

Stay connected! Follow the Office of Head Start on [X](#), [Facebook](#), and [Instagram](#). Visit the [Family Room blog](#) to learn more about the activities of the Administration for Children and Families (ACF).

Office of Head Start (OHS) | 330 C Street, SW | 4th Floor Mary E. Switzer Building | Washington, DC 20201
| <https://eclkc.ohs.acf.hhs.gov> | 1-866-763-6481 | [Contact Us](#)



Office of Head Start

Head Start Work Is Heart Work

Dear Head Start grant recipients and delegate agencies,

Happy Head Start Awareness Month! We hope you are celebrating in your programs and communities by raising awareness about how Head Start programs and services help vulnerable children and families succeed in school and in life. You can share messages from our [digital toolkit](#) or see what others are doing to celebrate by browsing #HeadStartAwarenessMonth, #HeadStartWorkHeals, and #CelebratingHSAM.

We at the Office of Head Start (OHS) continually work toward [our mission](#) for eligible children and families to receive high-quality services in safe and healthy settings to prepare children for school and life. OHS has five national priority areas to support this mission, described below. At the center of each is an unwavering commitment to equity, inclusion, and belonging.

Fundamental to this commitment is the belief that all children, families, staff, and communities — including those adversely impacted by persistent poverty, racism, and bias — should have the opportunity to thrive and reach their full potential. This ideal includes a Head Start workforce that is representative of the communities served, as well as programs that intentionally embed the language, culture, and lived experiences of enrolled children and families in their systems and services. Your program's leadership is key to this effort. They create conditions favorable for a program culture that facilitates opportunities for staff, families, and community partners to have safe spaces for open dialogue about equity, and to develop actionable strategies that promote belonging and address bias in program systems and services.

More than ever, [equity](#) is the foundation of the Head Start program and a lens that informs each of our priorities.

Child Health and Safety

Reduce or eliminate children's risk of exposure to harm and hazards.

OHS expects that each child served in Head Start and Early Head Start programs is properly safeguarded. As a major part of many communities where vulnerable children and families live, Head Start programs will be a safe space for them to thrive. For decades, Head Start programs have served as familiar and welcoming places for children and families. OHS will ensure that programs remain [safe environments](#) that children and families can trust for the critical services they need to support their success.

Partnerships with State Systems

Expand Head Start programs' capacity to coordinate services with state systems and national programs.

As the needs of children and families are becoming more complex, OHS is prioritizing the coordination of Head Start services with state systems and national programs to strengthen outcomes for children birth to age 5 and their families. We will leverage the resources of [Head Start Collaboration Offices \(HSCOs\)](#) across the country to strengthen partnerships with school systems that lead to the developmentally appropriate alignment of curriculum, assessment, and instruction through Early Head Start and Head Start and across the early elementary grades. We will further leverage the HSCOs to facilitate partnerships with schools to support successful transitions to kindergarten and to provide inclusive and responsive services for children with special needs. OHS will also broker stronger relationships with child welfare programs and work to strengthen cross-

collaborations with other programs administered by the Administration for Children and Families to provide integrated services for eligible children and families.

Reaching Children and Families

Ensuring that Head Start resources are targeted to children, families, and communities of greatest need.

The children and families most in need of Head Start services may also be the hardest to [recruit](#) and [enroll](#) in the program. Lingered effects of the pandemic have disproportionately affected people with the lowest incomes, including increasing the number of children and families experiencing homelessness. OHS is pursuing several strategies to help grant recipients consistently reach children and families who would benefit most from the program. This includes incentivizing innovative approaches to meeting the evolving needs of children and families eligible for Head Start and Early Head Start services through our grant-making process. We will issue regular guidance on special populations eligible for Head Start services — including children in foster care placement and families receiving public assistance — as well as clarify the requirements of the McKinney-Vento Homeless Assistance Act and how to actualize [45 CFR §1302.15\(c\)](#) of the Head Start Program Performance Standards. In addition, OHS will expand its technical assistance presence to further build programs' capacities to identify and prioritize children and families [experiencing homelessness](#) for enrollment.

Investing in the Workforce

Supporting a highly-skilled workforce with competitive pay, benefits, and access to supports for staff wellness.

OHS is committed to building and sustaining a strong and representative workforce across the Head Start system that delivers high-quality customer service experiences, effective program administration, and one that is fully equipped to support the needs of all children and families served. We will develop a workforce built for the 21st century that is responsive to the persistent effect of staffing shortages and that strategically positions Head Start to compete with other industries. This includes cultivating talent amongst enrolled parents as well as members of the community through investments made in their ability to access training, development, and attainment of credentials.

We will work with programs to implement policies and procedures and devote resources that support [staff wellness](#), [professional development](#) for staff to improve skills and practices, and opportunities to expand their roles in the program and field. Our objective is to create a workplace culture across the Head Start system in which staff view their roles in the context of a career pathway.

Quality Environments

Strengthening the key components of infrastructure that assist Head Start programs with operating most effectively.

OHS will work with Head Start programs to build a [solid foundation of strong systems](#) to support quality outcomes for children and families. To ensure Head Start services are delivered at the highest level of quality, programs will establish healthy fiscal, human resources, data and evaluation, technology, and facilities and learning environments.

OHS endeavors to ensure all Head Start and Early Head Start programs advance and promote equity. Thank you for the work you do on behalf of children and families.

/ Khari M. Garvin /

Khari M. Garvin
Director
Office of Head Start

MEALS SERVED TO CHILDREN IN HEAD START & EARLY HEAD START 12 Month Summary Report

Children that eat 2 meals and a snack at Head Start/ Early Head Start receives
1/2 to 2/3 of their daily nutritional needs.

Month	Breakfast	Lunch	Snack	Monthly Total
October-22	2851	2830	3810	9491
November-22	2375	2554	3141	8070
December-22	1901	1889	2343	6133
January-23	2459	2634	3575	8668
February-23	2191	2220	3084	7495
March-23	2435	2410	3386	8231
April-23	2767	2830	3868	9465
May-23	1937	1936	2385	6258
June-23	568	613	541	1722
July-23	628	716	643	1987
September-23	3070	3091	4006	10167
October-23	3069	3074	4035	10178
YEARLY TOTALS	26251	26797	34817	87,865

September 2023 HEAD START TIME & ATTENDANCE REPORT													
As of 9/30/23	ENROLLED			DROPPED									ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Drop	Monthly Drop	YTD Drop	Currently Enrolled	30 Day Count	Date Dropped	Total Enrollment	AI	Kid Days	Monthly ADA
Antlers 1	12		12			0	12	0		12		17	91.7%
Antlers 2			0			0	0	0		0			
Battiest	8		8			0	8	0		8	4	15	90.0%
Boswell 1	10		10	1		1	9	0		9	5	15	96.3%
Boswell 2	10		10		5	5	5	5	9/7/2023	10	2	15	94.9%
Broken Bow 1	14	3	17		2	2	15	2	9/21/2023	17		19	86.6%
Broken Bow 3	11	1	12			0	12	0		12		19	83.3%
Clayton 1	11	1	12			0	12	0		12	3	19	90.7%
Clayton 2	9		9			0	9	0		9	2	19	87.1%
Forest Grove 1	11		11		1	1	10	1	9/27/2023	11	5	15	83.5%
Forest Grove 2	13	2	15			0	15	0		15	8	15	86.6%
Fort Towson	7	4	11		1	1	10	1	9/28/2023	11	5	15	87.3%
Haworth	9	1	10		1	1	9	1	9/11/2023	10		13	89.7%
Horace Mann 1	10		10			0	10	0		10		19	95.8%
Horace Mann 2	13		13			0	13	0		13	4	20	95.8%
Horace Mann 3	10	1	11	1		1	10	0		10		20	92.0%
Hugo 2	5		5			0	5	0		5		20	88.0%
Hugo 4	8		8			0	8	0		8	1	20	91.9%
Idabel 1	10	1	11			0	11	0		11		19	89.7%
Idabel 2			0			0	0	0		0			
Idabel 3	13	1	14	1	1	2	12	1		13		19	91.7%
Rattan 1	12		12		1	1	11	1	9/12/2023	12	3	16	92.9%
Rattan 2	3		3			0	3	0		3	3	16	95.8%
Rattan 3	7		7	1		1	6	0		6	1	16	93.8%
Soper 1	10		10	1		1	9	0		9	3	20	93.9%
Soper 2	20		20		1	1	19	1	9/28/2023	20	10	20	84.7%
Valliant 1			0			0	0	0		0			
Valliant 2	13	1	14		2	2	12	2	9/22/2023	14		20	92.6%
TOTALS	259	16	275	5	15	20	255	15		270	59		90.1%

September 2023 Pre-K TIME & ATTENDANCE REPORT

As of 9/30/23	ENROLLED			DROPPED					ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Drop	Monthly Drop	YTD Drop	Currently Enrolled	Kid Days	Monthly ADA
Antlers 2			0			0	0		
Battiest			0			0	0		
Boswell 1			0			0	0		
Boswell 2		4	4			0	4	15	96.7%
Broken Bow 3			0			0	0		
Clayton 2			0			0	0		
Forest Grove 1			0			0	0		
Fort Towson			0			0	0		
Horace Mann 2			0			0	0		
Hugo 2			0			0	0		
Hugo 4			0			0	0		
Rattan 2			0			0	0		
Rattan 3			0			0	0		
Soper 2			0			0	0		
TOTALS	0	4	4	0	0	0	4		96.7%

September 2023 EHS Time and Attendance												
As of 9/30/23	ENROLLED			DROPPED								ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Dropped	Monthly Drop	YTD Drop	Currently Enrolled	AI	30 Day Count	Date Dropped	Kid Days	Monthly ADA
Antlers	47	2	49	24	2	26	23	1	2	9/18/2023	19	84.5%
Hugo	25		25	14		14	11	1	0		20	88.2%
Idabel	23	1	24	15		15	9	2	0		20	87.8%
TOTALS	95	3	98	53	2	55	43	4	2			86.1%

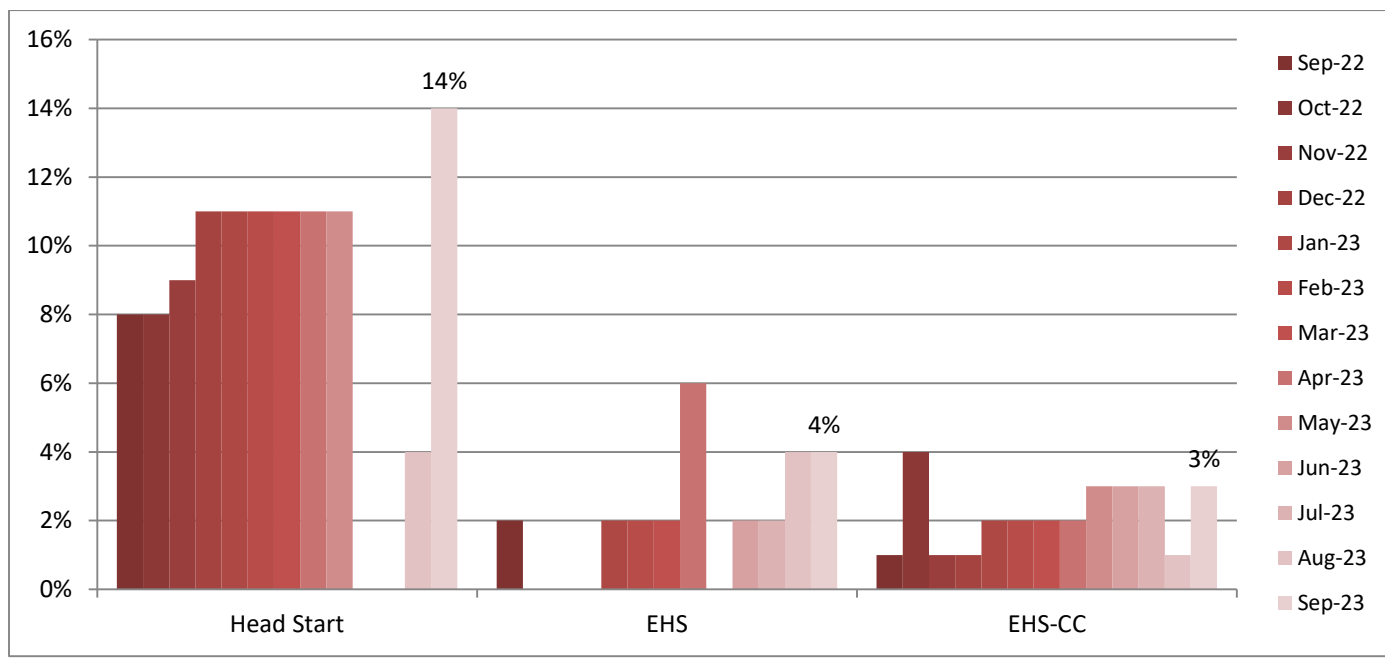
September 2023 EHS-CC Time and Attendance												
As of 9/30/23	ENROLLED			DROPPED								ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Dropped	Monthly Drop	YTD Drop	Currently Enrolled	AI	30 Day Count	Date Dropped	Kid Days	Monthly ADA
ELC-Antlers	17		17	9	1	10	7		1	9/19/2023	19	90.3%
ELC-Broken Bow	38	4	42	22	4	26	16		4	9/22/2023	20	80.5%
ELC-Hugo	16	1	17	9		9	8		0		20	86.8%
ELC-Idabel	32	3	35	22		22	13	3	0		20	83.9%
Cabbage Patch	29	1	30	12		12	18	5	0		20	91.4%
The LearningTree	66	4	70	32	1	33	37	1	1	9/14/2023	20	89.2%
TOTALS	198	13	211	106	6	112	99	9	6			87.3%

Data Analysis Report Summary

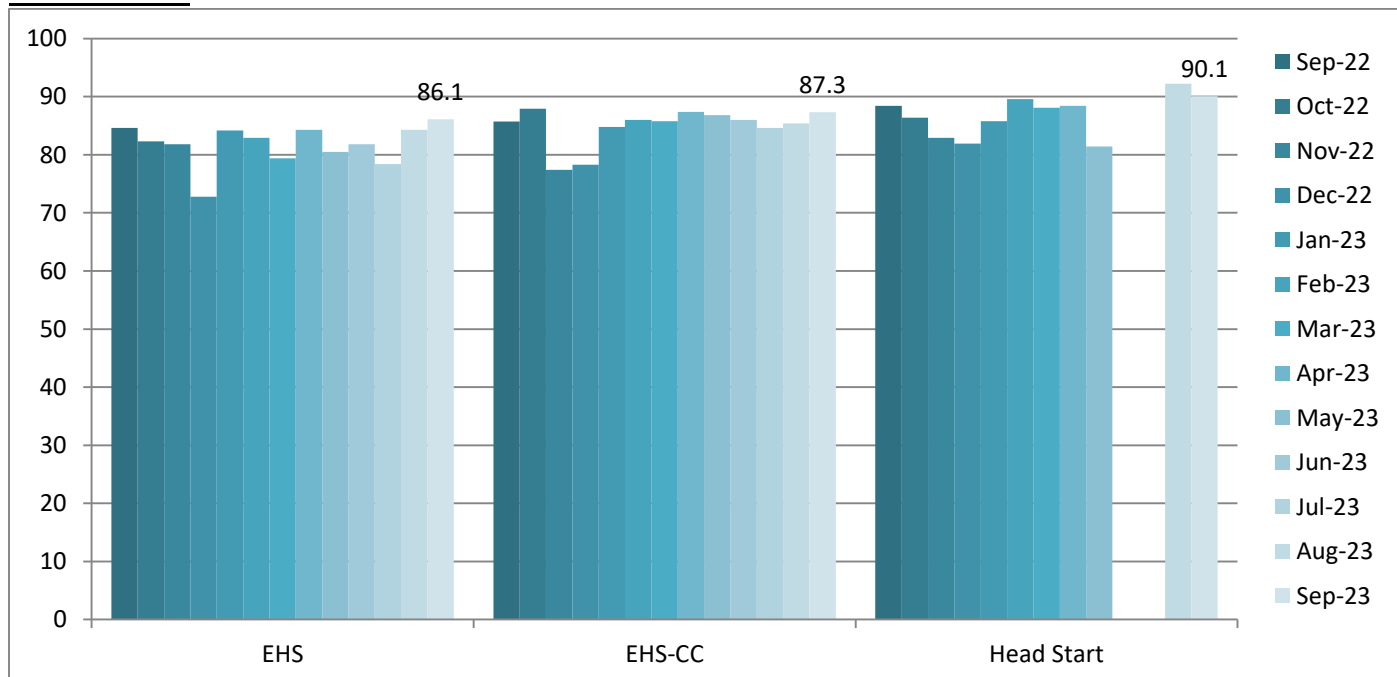
September 2023

Disabilities

IEP/IFSP –

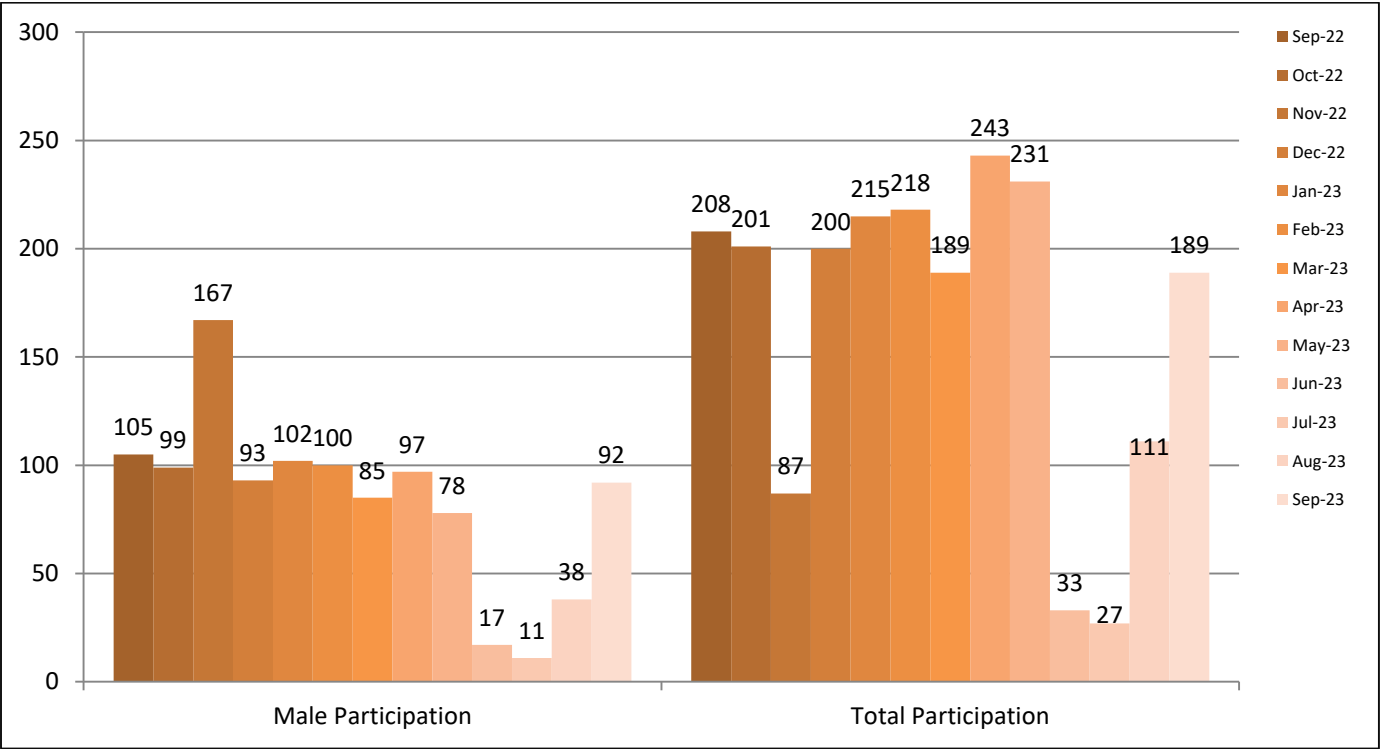


Attendance

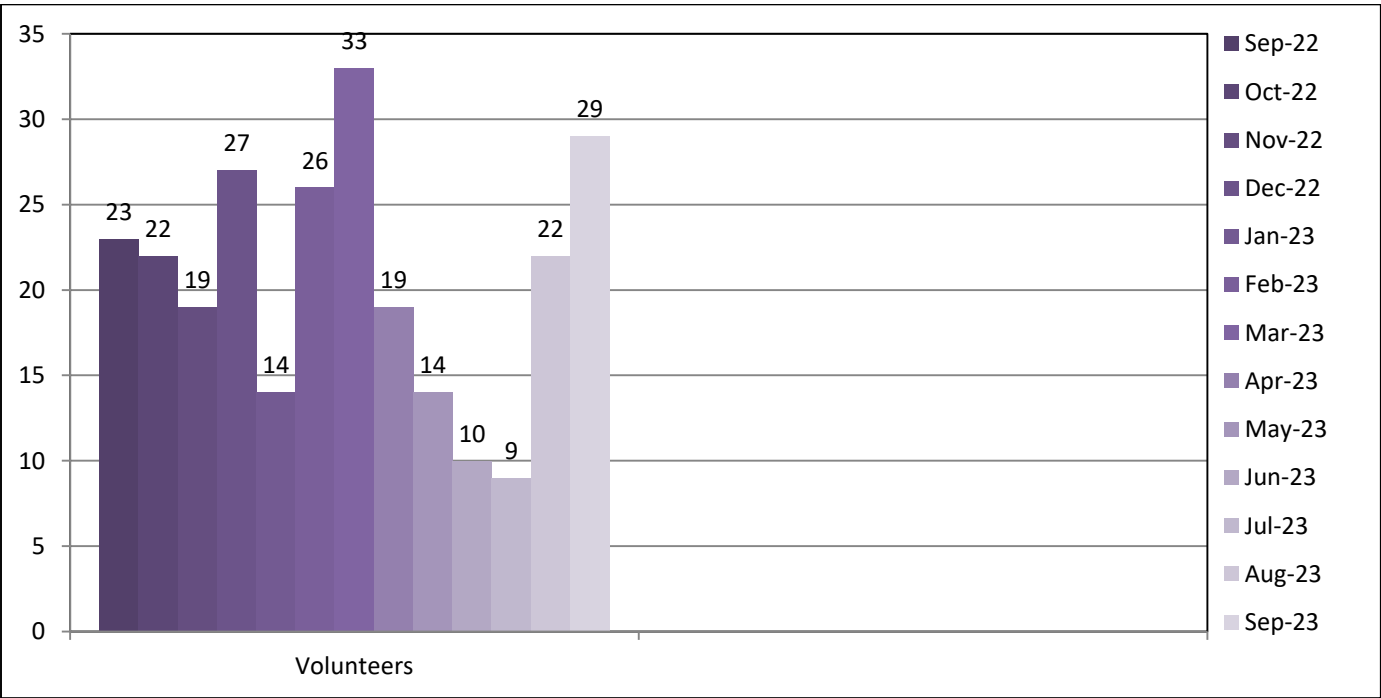


Family & Community Engagement

Dad's Day



Parents Ready to Read



October 23, 2023

Dear William:

NeighborWorks America believes that *how* boards work is just as important as *what* boards work on. Highly effective boards intentionally engage a variety of individual members and partner constructively with the CEO/Executive Director. The purpose of this letter is to familiarize you, as the leader of the board, with the governance strengthening tools and resources available to you and your board as a member of the NeighborWorks network.

NeighborWorks America Provides

- **Relationship Manager (RM)**: A NeighborWorks America staff member is assigned to your organization to assist with any board governance needs. Your RM will help identify how to best connect your organization with board tools, training opportunities, and resources from NeighborWorks America. **Feel free to contact** your Relationship Manager to introduce yourself and learn more about these resources and opportunities. RMs can also present tools and resources to your full board of directors at a regularly scheduled board meeting. Your RM is cc'd to this email.
- **NeighborWorks America's Excellence in Governance program (EIG)**: Focused on accountability, team building, and governance excellence, the EIG program weaves together assessment, content expertise, REDI (race, equity, diversity & inclusion), and peer-learning through a multi-year program. Moving to a hybrid model starting in 2024, EIG Academy will allow more board members from more organizations to participate. To join the information distribution list, contact exingov@nw.org.
- **Data & Dashboards Your Board Can Use**: NeighborWorks organizations work hard to report data to NeighborWorks every quarter, and the Business Intelligence Team at NeighborWorks America provides that data back to the NeighborWorks network in interactive dashboards. The dashboards cover topics such as homeownership activity, rental housing, NeighborWorks organization staff salaries by cohort, with new dashboards added regularly! The dashboards will automatically update with the most recent quarter's data once it's been processed and we're always making improvements to make the visualizations more flexible, insightful, and easy to use. The Tableau dashboards below are a result of common BIS analysis requests and feedback from the network so if there's an analysis or visualization you think would be impactful, let us know! The URL for the dashboards is <https://nwinfo.my.site.com/NWMemberBI/s/>, and all network organizations and their Board members can be granted access to the site. If you need a login, please contact businessintelligence@nw.org.

Complimentary Governance Memberships & Resources

- **JOIN: Nonprofit Risk Management Center “Organizational Membership”:**
NeighborWorks purchases an annual Organizational Membership from the Nonprofit Risk Management Center for all network staff and board members. Login at www.nonprofitrisk.org - click the white ‘Affiliate Login’ button (or three bars) in the upper right, click the orange ‘Create Your Account’ button, complete the short form and enter “NeighborWorks America” in the “Affiliate” line. Allow 24 hours for approval to arrive via email. Contact bdgovernance@nw.org and copy your RM with any issues accessing the membership.
- **JOIN: BoardSource “Organizational Membership”:** NeighborWorks purchases an annual Organizational Membership from BoardSource for all network staff and board members. Membership includes posts on board governance trends and best practices plus access to their robust member website. Go to www.boardsource.org/neighborworks to add yourself to the Organizational Member list. Contact bdgovernance@nw.org and copy your RM with any issues accessing the membership.
- **Complimentary BoardSource Assessments:** Contact your RM for the link to access the assessments.
 - **Board Self-Assessment**, a \$1,574 value. This tool helps boards identify strengths and improvements needed. In addition to a thorough report, BoardSource provides a customized to your organization PowerPoint report with thought-starter questions to guide your board thru the assessment results to determine next steps. Your RM is available to assist with a board debrief and action planning. Each network organization may utilize one BoardSource Board Self-Assessment each year. *NOTE: NeighborWorks recommends that a written board self-assessment be completed every three years.*
 - **Chief Executive Assessment**, a \$1,199 value. In addition to providing constructive feedback for the CEO/Executive Director on their annual performance including their relationship with the board, this process allows the CEO/Executive Director to identify his/her own strengths and areas for improvement. Each network organization may utilize one BoardSource CEO Assessment each year. *NOTE: NeighborWorks recommends that a written ED/CEO assessment be completed every year.*
- **Executive Transition resources:** NeighborWorks believes that every organization with an CEO/Executive Director must be prepared for an unplanned executive transition. Contact your RM for sample transition policies, emergency and scheduled succession plan samples PLUS articles, resources for an executive search including strategies to increase new executive satisfaction and retention!

- **NeighborWorks Member Site:** The [Board Section of the NeighborWorks member site](#) has a resource library full of governance templates, samples, and articles that you can access at any time. To access the Member Site - <https://member.nw.org> – you will be prompted to create a username and password. Contact members@nw.org and copy your RM with any issues accessing the member site.

Governance Training and Education

- **Online Learning:** We strongly recommend our popular, foundational online course - [Board Governance and Oversight \(ML240el\)](#) - be part of every new board member orientation process. Topics include the three legal duties of all board members, full board and individual board member role & responsibilities, how committees function best, the importance of board and CEO assessments, etc. Cost is \$115; *bulk purchase discount is available* for this course. Contact bdgovernance@nw.org and copy your RM to request the bulk purchase discount. Learn more here: <https://www.neighborworks.org/Training-Services> then click on Online Training.
- **In-Person Training:** NeighborWorks America provides in-person governance training through the NeighborWorks Training Institutes (NTIs). Find details here <https://www.neighborworks.org/Training-Services> about upcoming NTIs and courses offered. Contact your CEO/Executive Director for more information on registration.

Feel free to contact your Relationship Manager, Leon Gray, at lgray@nw.org to introduce yourself and learn more about these resources and opportunities. RMs can also present tools and resources to your full board of directors at a regularly scheduled board meeting.

I hope you'll find one or more of the offerings above useful this year.

NeighborWorks America thanks you for your board service.

Sincerely,



Deletta Dean, Regional Vice President

cc: Becky Reynolds, Executive Director
Leon Gray, Sr. Relationship Manager



2023

Save the Date

PLEASE JOIN US TO CELEBRATE

The Graduating Class of Winter 2023

for LIFT Choctaw County Youthbuild

DECEMBER 02, 2023 AT 11:00 AM
KIAMICHI TECHNOLOGY CENTER
107 SOUTH 15TH STREET, HUGO, OK 74743