LIFT

Community Action Agency, Inc.

Board of Directors Meeting

JANUARY 9, 2024 • 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, January 9, 2024 · 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. Recognition of William Smith as Elected Representative for Kiamichi Opportunities, Inc., a Low-Income Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2026*)

D. Recognition of Vicky Wade as Elected Representative for Gracefully Yours Foundation of Broken Bow, a Low-Income Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2026*)

E. Consideration, Discussion, and Vote to Accept Tami Barnes as Appointed Representative for the City of Fort Towson, a Public Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2026*)

F. Consideration, Discussion, and Vote to Accept Sandra Meeks as Appointed Representative for the Broken Bow Chamber of Commerce, a Private Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2026*)

G. Consideration, Discussion, and Vote to Accept Consuelo Splawn as Appointed Representative for the Choctaw Nation of Oklahoma, a Public Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2026*)

H. Finance/Audit/Loan Committee Report

Consent Docket *- The following items of business indicated by brackets (I and J, K, L) 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unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.*

I. Consideration, Discussion and Vote to Approve December 2023 Regular Meeting Minutes (*Organizational Standard 5.5*)

J. Consideration, Discussion, and Vote to Approve November 2023 Financial Reports; Distribution of December 2023 Financials for February 2024 Consideration and Vote (*OS 8.7*)

K. Consider Submission of Resolutions/Grant Applications, Vote to Approve – **$20,000**
1. 2024 Community Grants Program Application to Carolyn Watson Rural Oklahoma Community Foundation - ***$20,000***

L. Consider Acceptance of Grants/Contracts/Awards, Vote to Approve – **$10,000**
1. 2023 Grant Award from Potts Family Foundation, Inc. - ***$10,000***

M. Training over Board Member Duties, Roles, and Responsibilities/CSBG Information Memorandum #82 Tripartite Boards; Distribution, Discussion/Review, Completion, and Collection of Required Documents (including Code of Conduct and Conflict of Interest Policies/Certification; Board Member Job Descriptions; Demographic/Disclosure Questionnaire; Child Abuse and Neglect Information System Search Form; By-Laws/Addendum and Attestation) Relative to LIFT CAA's Governing Board Members, to be kept on file at the Administrative Office located at 209 N. 4th Street in Hugo, Oklahoma (*OS 5.4, 5.6, 5.7 & 5.8*)

N. Consideration, Discussion, and Vote to Approve Board Resolution Authorizing Executive Director to Conduct Business on Behalf of LIFT CAA

O. Board Training: Board Self-Assessment (*OS 5.7*)

P. Board Training/Programmatic Report: Victim Services Programs and Evaluation (*OS 5.7 & 5.9*)

Q. Consideration, Discussion, and Vote to Approve Victim Services Programs Evaluation

R. Presentation and Review of the Head Start/Early Head Start Governance, Leadership, and Oversight Capacity Screener and Training Plan

S. Consideration, Discussion, and Vote to Approve the Head Start/Early Head Start Governance, Leadership, and Oversight Capacity Screener and Training Plan

T. Board Training/Programmatic Report: Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA) and Distribution of 2024-2025 ERSEA Integrated Services Policies and Procedures with Prioritization Schedule/Point System for Review (*OS 5.7 & 5.9*)

U. 2023 LIFT CAA Customer Satisfaction Report: 4th Quarter (Oct. – Dec.) Results *(OS 1.3 & 6.4)*

V. Risk Assessment and Management Report

W. Recognition of January 2024 Employee of the Month:
Kimberly Wright, Program Manager – Work Ready Idabel

X. Recognition of Service Award:
Twenty-Five Years: Rhonda Teague, Planning Director – Administration

Y. Other Reports/Announcements/Correspondence: HS/EHS/EHS-Child Care Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Oklahoma CASA Association Notification; 2023 Holiday Food Basket Report; 2023 Salvation Army Red Kettle Campaign Report; National Stalking Awareness Month (*OS 5.9*)

Z. 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*)

AA. 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
December 12, 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, December 12, 2023 at 10:06 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 Andrea Henkel.

Roll Call was taken and a quorum was established (16 Board Members present, 10 absent). The following Board Members were present at the meeting site: Tami Barnes, Tiffany Brockway, Brad Burgett, Kevin Cory, Kristi Graham, David Hawkins, Andrea Henkel, Sharon Johnson, Vickie Leathers, Wade Scott, David Smith, William Smith, Consuelo Splawn, Jim Bob Sullivan, Leah Thomas, and Debra Williams. The following members were absent: Brent Franks, Patsy Guess, Jordan Hill, Jia Johnson, Trina Low, Kara Maness, Sandra Meeks, Carolyn Pool, Vicky Wade, and Craig Young. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Michelle Pulliam, Rhonda Teague, Sheree Ensley, Macy Self, Darla Galyon, Rebecca (Reynolds) Porter, Brittany Bailey, Sommer Springfield, Susie Mashburn, Mattie McKee, Brandon McDaniel, Jeannie McMillin, Tonya Finley, Branden Billy, Jordan Mack, DeeDee Atwood, Stella Dennis, Gary Teague Jr., Ken McDaniel, and Amber Duncan. LIFT CAA employees and/or visitors present, appearing remotely via the Zoom communications platform included: Kathy James.

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.

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Vickie Leathers as appointed representative for the Salvation Army, a Private Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2026). A motion was made by Brad Burgett and seconded by Wade Scott to accept Vickie Leathers as appointed representative for the Salvation Army, a Private Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 14; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item C).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Trina Low as appointed representative for the Pushmataha County Chamber of Commerce, a Private Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2026). A motion was made by Debra Williams and seconded by William Smith to accept Trina Low as appointed representative for the Pushmataha County Chamber of Commerce, a Private Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 14; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item D).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Debra Williams as appointed representative for Williams Drilling Company, a Private Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2026). A motion was made by Brad Burgett and seconded by Andrea Henkel to accept Debra Williams as appointed representative for Williams Drilling Company, a Private Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 14; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item E).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Kristi Graham as appointed representative for the McCurtain County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2024). A motion was made by Andrea Henkel and seconded by William Smith to accept Kristi Graham as appointed representative for the McCurtain County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 14; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item F).

Board Member Andrea Henkel was appointed to serve as Board Mentor for new Board Member Kristi Graham (Organizational Standard 5.7).

Sheree Ensley, Fiscal Officer, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on December 12, 2023 prior to the Board Meeting. 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 October 2023. The Committee was presented with the November 2023 Financial Reports and Meeting Minutes. The Committee received an update on the 403(b) Retirement Plan Audit, which is currently ongoing, and the 2023 Agency Audit fieldwork is scheduled to begin the week of March 11, 2024.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the November 2023 Regular Meeting Minutes and the October 2023 Financial Reports; the November 2023 Financials were distributed for consideration and vote at the January 2024 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Kevin Cory and seconded by David Smith to approve the November 2023 Regular Meeting Minutes and the October 2023 Financial Reports. The roll call vote was as follows: Yes 14; No 0; Abstain 0. The motion carried. The Voting Record is attached (Items I & J).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

1. FY 2024 Expendable Grant Application to NeighborWorks® America in the amount of $182,000; if awarded, funding under the Expendable category will be used for salary and other operational support of housing staff, including the Housing Director, Housing Counselors and Housing Outreach personnel.
2. FY 2024 Capital Grant Application to NeighborWorks® America in the amount of $50,000; if awarded, funding under the Capital category will be used to make improvements at LIFT CAA's multi-family properties and/or increase homeownership opportunities via the residential lending line of business.

After discussion and Board Member input with regards to the applications presented, a motion was made by Brad Burgett and seconded by Jim Bob Sullivan to approve the submission of resolutions and/or grant applications in the amount of $232,000 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item K).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

1. Christmas Food Basket Donation from International Paper Valliant Mill in the amount of $1,000; this funding will be used to provide food baskets to needy families in the tri-county service area during the 2023 Christmas holiday season.
2. PY 2023 Department of Energy Weatherization Assistance Program Grant Award from the Oklahoma Department of Commerce/Community Development in the amount of $273,906; these funds will be used to support LIFT's Weatherization Program and provision of services within Bryan, Carter, Choctaw, Coal, Love, McCurtain, Pontotoc, and Pushmataha Counties.
3. FY 2024 Head Start/Early Head Start Program Grant Award (New/Baseline) from Administration for Children and Families, Office of Head Start in the amount of $2,254,971; this partial funding award will provide support for program operations and training/technical assistance for the Head Start and Early Head Start Programs for a period of one year (12/1/2023–11/30/2024), with a funded Federal enrollment of 435 children (387 Head Start, 48 EHS).
4. Round Up Change Program Donation (Court Appointed Special Advocates) from Kwik Chek/McCraw Oil Company Incorporated in the amount of $1,500; these funds, which were raised locally at area Kwik Check stores through the Round Up Change Program, will be used to support operational expenses of the agency's CASA Program.

A motion was made by Jim Bob Sullivan and seconded by Debra Williams to approve acceptance of grants, contracts, and awards in the amount of $2,531,377 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item L).

Darla Galyon, Head Start/Early Head Start/EHS-Child Care Director, requested the Board's consideration, discussion, and vote to approve submission of a Teacher Qualifications Waiver Request for Lori Stiles to the Office of Head Start. The Head Start Program has been unsuccessful in recruiting qualified applicants for teaching positions, who have at least an Associate Degree in early childhood education or related field and the required coursework and

experience. Lori Stiles (who has served as a Head Start Teacher Assistant and past School Readiness AmeriCorps Member) meets the required qualification requirements to request a waiver, which is comparable to Oklahoma's Emergency Teacher Certification. Stiles holds a current Preschool Child Development Associate Credential, and is working to obtain an Associate of Arts Degree in Child Development. If approved, Stiles will be eligible to be hired as a Head Start Teacher to fill a vacant classroom position; during the timeframe for the requested three-year waiver, she will work with the Professional Development Specialist to ensure completion of her goals. A motion was made by Brad Burgett and seconded by Tami Barnes to approve submission of the Teacher Qualifications Waiver Request for Lori Stiles to the Office of Head Start. The roll call vote was: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item M).

Rhonda Teague, Planning Director, provided the Board with a report on the Agency-Wide Comprehensive Risk Assessment. To comply with Organizational Standard 4.6, each Community Action Agency must complete an in-depth Risk Assessment to help identify any potential for fraud, legal issues, safety concerns, and other things that could cause harm to the agency as a whole. Teague explained that the agency utilized an online risk assessment tool developed through a collaboration between the National Community Action Partnership and Nonprofit Risk Management Center. The Risk Assessment was completed on December 7, 2023 and generated a 70-page report containing feedback and recommendations based on the responses to each section of the assessment tool. The Risk Assessment covered general and specific topics, including governance, financial management, property, and human resources. Teague reviewed the report with the Board, outlining recommendations to minimize risk. Based on review of the report, the agency's practices, policies, and procedures appear to be sufficient to minimize and manage risk; no areas of the report showed any significant weakness or concerns. A more comprehensive, thorough review of the report will be conducted by the Risk Assessment and Management Committee in conjunction with the Risk Manager, LIFT CAA leadership, and staff. The goal will be to identify and prioritize potential risks, then develop strategies intended to reduce any and all risk to the greatest possible extent.

Brittany Bailey, ERSEA Specialist, provided a Board Training over Eligibility, Recruitment, Selection, Enrollment, and Attendance (Organizational Standard 5.7). This program training worked to inform the Board of processes, strategies, and policies/procedures used to ensure that Head Start/Early Head Start/EHS-Child Care only enrolls eligible children within the programs. Bailey reviewed each component of ERSEA—Eligibility, Recruitment, Selection, Enrollment, and Attendance—the processes involved with each, and how they are utilized or implemented within the three programs.

Susie Mashburn, Head Start/Early Head Start/EHS-Child Care Early Childhood Development and Curriculum Coach, provided a Board Training/Programmatic Report over the Head Start, Early Head Start, and Early Head Start-Child Care Programs' School Readiness/Child Outcomes Results for Fall 2023-2024 (Organizational Standards 5.7 and 5.9). Additionally, the training provided information on the use of Conscious Discipline methodology/strategies for improving the quality of student-teacher interactions within the programs as well as in enhancing the ability of the children served to self-regulate their feelings and emotions.

Rebecca (Reynolds) Porter, Executive Director, provided Board Training over the following: the Open Meeting Act, Open Records Act, and Role/Recording of the Board Minutes (Organizational Standard 5.7). The training was facilitated using material provided by the Oklahoma Office of the Attorney General and excerpts from "Tools for Top-Notch CAAs: A Practical Approach to Governance and Financial Excellence" by CAPLAW.

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided the Board with the Policy Council Report for the November 28, 2023 meeting (Organizational Standards 2.1 and 5.9).

Jeannie McMillin, Transit Director, provided the Board with the Transportation Advisory Council Report (Organizational Standard 5.9). The Transportation Advisory Council was established during the April 2021 Board Meeting for the Transit Program with regards to funding received from the Kiamichi Economic Development District of Oklahoma's Area Agency on Aging Division. These KEDDO funds help to fill a gap in transportation services for older Americans (60 years of age or older) who do not qualify for Medicaid, Tribal, or other free transportation services. 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 will serve an essential function in helping to identify and address transportation barriers, challenges, and resources. During the tenth meeting, held on December 12, 2023 (prior to the Board Meeting), Advisory Council members were briefed on the service results so far. Advisory Council members were asked to report on any new or additional identified gaps in transportation needs in their communities; no such gaps were reported. It was also noted that Sharon Johnson was appointed to fill the vacant seat on the Transportation Advisory Council.

Andrea Henkel, Board Member, provided the Board Giving Report (Organizational Standard 5.7). In total, 19 Board Members have provided a monetary donation to the agency during 2023 so far. Achieving 100% of Board giving is the goal as it is an eligibility requirement by many private funders and foundations. Any amount is appreciated and ensures the agency's ability to apply for funds where Board giving is a threshold requirement. Board Members can designate what program or activity the donation is to be used for, and employees of the agency can also make donations on behalf of Board Members. Since the funding entity typically looks at the year prior, by achieving 100% Board giving in 2023, the agency is eligible to apply for funding in 2024.

Rebecca (Reynolds) Porter, Executive Director, recognized the Victim and Youth Services Programs' staff members as the December 2023 Employees of the Month. This included employees of the CASA, Mentoring, Safe Place Healing Hearts, Safe Place Healing Hearts Too, and Victim Advocacy Services Programs. Employees recognized included: Doris Long (Director, Victim and Youth Services Programs), DeeDee Atwood (Victim Services Coordinator/Advocate Coordinator, Victim Advocacy Services and CASA Programs), Branden Billy (Program Coordinator/Victim Advocate, Safe Place Healing Hearts Too Program), and Tonya Finley (Program Coordinator/Victim Advocate, Safe Place Healing Hearts Program).

Rebecca (Reynolds) Porter, Executive Director, recognized Ken McDaniel (Maintenance Technician, Head Start/EHS/EHS-Child Care Programs) and Gary Teague Jr. (Maintenance Technician, Head Start/EHS/EHS-Child Care Programs) as the 2023 Employees of the Year.

Other Reports/Announcements/Correspondence were presented as follows: HS/EHS/ EHS-CC Monthly Reports – Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, and Data Analysis (Organizational Standard 5.9).

There being no other business to come before the Board, a motion was made by Brad Burgett and seconded by Jim Bob Sullivan 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 Y).

The Regular Meeting adjourned at 10:57 a.m.

_____
Brad Burgett, Secretary/Treasurer

10:06

B. Burgett / S. Wade | D. Williams / W. Smith | B. Burgett / A. Henkel | A. Henkel / W. Smith | K. Corey / D. Smith

	December 12, 2023	Present	Absent	C			D			E			F			I/J		
				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	Kevin Cory	✓		✓			✓			✓			✓			✓		
5	Brent Franks		✓															
6	Kristi Graham	✓		✓			✓			✓			✓			✓		
7	Patsy Guess		✓															
8	Andrea Henkel	✓		✓			✓			✓			✓			✓		
9	Jordan Hill		✓															
10	Jia Johnson		✓															
11	Sharon Johnson	✓		✓			✓			✓			✓			✓		
12	Vickie Leathers	✓		✓			✓			✓			✓			✓		
13	Trina Low		✓															
14	Kara Maness		✓															
15	Sandra Meeks		✓															
16	Carolyn Pool		✓															
17	Wade Scott	✓		✓			✓			✓			✓			✓		
18	David Smith	✓		✓			✓			✓			✓			✓		
19	William Smith	✓		✓			✓			✓			✓			✓		
20	Consuelo Splawn	✓																
21	Jim Bob Sullivan	✓		✓			✓			✓			✓			✓		
22	Leah Thomas	✓		✓			✓			✓			✓			✓		
23	Vicky Wade		✓															
24	Debra Williams	✓		✓			✓			✓			✓			✓		
25	Craig Young		✓															
26	David Hawkins	✓		✓			✓			✓			✓			✓		
27																		

10:57

B. Burgett / T. Sullivan — J. Sullivan / D. Williams — B. Burgett / T. Barnes — B. Burgett / J. Sullivan — / — /

	December 12, 2023	Present	Absent	K			L			M			Y					
				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	Kevin Cory	✓		✓			✓			✓			✓					
5	Brent Franks		✓															
6	Kristi Graham	✓		✓			✓			✓			✓					
7	Patsy Guess		✓															
8	Andrea Henkel	✓		✓			✓			✓			✓					
9	Jordan Hill		✓															
10	Jia Johnson		✓															
11	Sharon Johnson	✓		✓			✓			✓			✓					
12	Vickie Leathers	✓		✓			✓			✓			✓					
13	Trina Low		✓															
14	Kara Maness		✓															
15	Sandra Meeks		✓															
16	Carolyn Pool		✓															
17	Wade Scott	✓		✓			✓			✓			✓					
18	David Smith	✓		✓			✓			✓			✓					
19	William Smith	✓		✓			✓			✓			✓					
20	Consuelo Splawn	✓		✓			✓			✓			✓					
21	Jim Bob Sullivan	✓		✓			✓			✓			✓					
22	Leah Thomas	✓		✓			✓			✓			✓					
23	Vicky Wade		✓															
24	Debra Williams	✓		✓			✓			✓			✓					
25	Craig Young		✓															
26	David Hawkins	✓		✓			✓			✓			✓					
27																		

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

FINANCIAL ROW	AMOUNT (AS OF DEC 2023)	COMPARISON AMOUNT (AS OF ADJUST 2022)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	$9,636,792.52	$8,413,383.22	$1,223,409.30	14.54%
1020 - Payroll Account	$7,806.40	$1,753.85	$6,052.55	345.10%
1021 - First United Accounts Payable	$213,736.61	$6,250.82	$207,485.79	3,319.34%
1022 - First United TH Reserve	$139,341.24	$131,955.09	$7,386.15	5.60%
1023 - First United General Escrow	$160,819.37	$113,538.59	$47,280.78	41.64%
1024 - First United Marina License	$240.82	$240.46	$0.36	0.15%
1025 - First United Deposit (PayPal)	$2,115.20	$2,016.44	$98.76	4.90%
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	$1,835.61	$1,823.39	$12.22	0.67%
1040 - Petty Cash	$410.00	$410.00	$0.00	0.00%
1050 - McCurtain County National Bank	$47,731.03	$26,015.47	$21,715.56	83.47%
Total - 1000 - Cash	**$11,025,858.74**	**$9,560,585.69**	**$1,465,273.05**	**15.33%**
Total Bank	**$11,025,858.74**	**$9,560,585.69**	**$1,465,273.05**	**15.33%**
Accounts Receivable				
1100 - Receivables	**$890,266.90**	**$72,102.84**	**$818,164.06**	**1,134.72%**
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	$202,957.53	$192,896.53	$10,061.00	5.22%
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	**$1,320,140.94**	**$1,346,211.01**	**($26,070.07)**	**-1.94%**
Total Accounts Receivable	**$2,210,407.84**	**$1,418,313.85**	**$792,093.99**	**55.85%**
Other Current Asset				
1400 - Other assets				
1450 - Prepaid Expenses	$51,246.22	$24,618.06	$26,628.16	108.17%
1465 - Advances Paid	$347.60	$0.00	$347.60	0.00%
Total - 1400 - Other assets	**$51,593.82**	**$24,618.06**	**$26,975.76**	**109.58%**
1500 - Investments	**$685,011.86**	**$507,453.03**	**$177,558.83**	**34.99%**
NS097 - Interfund Due to /Due from	($155,455.34)	($109,231.26)	($46,224.08)	42.32%
Payroll Float	$2,442.38	$0.00	$2,442.38	0.00%
Total Other Current Asset	**$583,592.72**	**$422,839.83**	**$160,752.89**	**38.02%**
Total Current Assets	**$13,819,859.30**	**$11,401,739.37**	**$2,418,119.93**	**21.21%**
Fixed Assets				

FINANCIAL ROW	AMOUNT (AS OF DEC 2023)	COMPARISON AMOUNT (AS OF ADJUST 2022)	VARIANCE	% VARIANCE
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%
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	**$20,015,394.37**	**$17,597,274.44**	**$2,418,119.93**	**13.74%**
Liabilities & Equity				
Current Liabilities				
Accounts Payable	**($11,799.29)**	**$101,418.93**	**($113,218.22)**	**-111.63%**
Other Current Liability				
2100 - Accrued liabilities	**$1,144,326.28**	**$389,263.62**	**$755,062.66**	**193.97%**
2400 - Refundable Advances	**$7,100.67**	**$3,956.00**	**$3,144.67**	**79.49%**
Total Other Current Liability	**$1,151,426.95**	**$393,219.62**	**$758,207.33**	**192.82%**
Total Current Liabilities	**$1,139,627.66**	**$494,638.55**	**$644,989.11**	**130.40%**
Long Term Liabilities				
2700 - Long-term notes & loans payable				
2770 - Long-term liabilities - Mower Loan	$4,100.28	$9,545.47	($5,445.19)	-57.04%
Total - 2700 - Long-term notes & loans payable	**$4,100.28**	**$9,545.47**	**($5,445.19)**	**-57.04%**
Total Long Term Liabilities	**$4,100.28**	**$9,545.47**	**($5,445.19)**	**-57.04%**
Equity	**$18,871,666.43**	**$17,093,090.42**	**$1,778,576.01**	**10.41%**
Total Liabilities & Equity	**$20,015,394.37**	**$17,597,274.44**	**$2,418,119.93**	**13.74%**

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

FINANCIAL ROW	AMOUNT (JAN 2023 - DEC 2023)	COMPARATIVE AMOUNT (JAN 2022 - ADJUST 2022)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	**$42,767.82**	**$69,049.56**	**($26,281.74)**	**-38.06%**
4100 - Inkind Revenue	**$969,802.98**	**$1,291,033.69**	**($321,230.71)**	**-24.88%**
4200 - Miscellaneous Revenue	**$3,840,210.46**	**$2,004,891.58**	**$1,835,318.88**	**91.54%**
4400 - State Revenue	**$1,046,364.73**	**$4,794,084.40**	**($3,747,719.67)**	**-78.17%**
4500 - Federal Revenue	**$15,696,737.78**	**$23,261,693.66**	**($7,564,955.88)**	**-32.52%**
4900 - Recoveries from Programs	**$3,631,244.42**	**$3,119,843.96**	**$511,400.46**	**16.39%**
5000 - Rental Revenue	**$654,115.50**	**$636,571.50**	**$17,544.00**	**2.76%**
5100 - Program Fee Revenue	**$1,723,578.95**	**$2,082,811.45**	**($359,232.50)**	**-17.25%**
5300 - Interest and Dividends	**$160,875.95**	**$1,010,047.11**	**($849,171.16)**	**-84.07%**
5400 - Revenue from other sources	**$1,754,718.11**	**$1,156,674.32**	**$598,043.79**	**51.70%**
5800 - Special Event Expense	**$8,795.33**	**$0.00**	**$8,795.33**	**0.00%**
Total - Income	**$29,529,212.03**	**$39,426,701.23**	**($9,897,489.20)**	**-25.10%**
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	**$29,529,042.72**	**$39,424,640.51**	**($9,895,597.79)**	**-25.10%**
Expense				
7000 - Grants, contracts, & direct assistance	**$1,687,388.80**	**$2,008,078.68**	**($320,689.88)**	**-15.97%**
7200 - Salaries & related expenses	**$11,136,021.46**	**$18,189,681.74**	**($7,053,660.28)**	**-38.78%**
7300 - Indirect Cost Pool Expense	**$1,832,467.99**	**$2,796,846.95**	**($964,378.96)**	**-34.48%**
7500 - Contract/Consultant Services	**$1,768,636.93**	**$1,155,284.95**	**$613,351.98**	**53.09%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$628,478.17	$1,477,813.04	($849,334.87)	-57.47%
8120 - Other/Maint Supplies	$82,555.10	$723,283.92	($640,728.82)	-88.59%
8130 - Telephone & Internet	$232,169.94	$356,500.10	($124,330.16)	-34.88%
8140 - Postage & shipping	$12,282.81	$17,808.20	($5,525.39)	-31.03%
8150 - Medical/Dental Supplies	$58,200.43	$63,435.01	($5,234.58)	-8.25%
8160 - Events/Meeting Expense	$36,331.46	$69,838.93	($33,507.47)	-47.98%
8165 - SPECAIL EVENT/CHRISTMAS IN THE PARK	$0.00	$6,577.97	($6,577.97)	-100.00%
8170 - Printing & copying	$71,986.78	$87,501.03	($15,514.25)	-17.73%
8180 - Fatherhood	$500.00	$590.97	($90.97)	-15.39%
8190 - WX Materials	$40,721.08	$66,000.20	($25,279.12)	-38.30%
Total - 8100 - Non personnel expenses	**$1,163,225.77**	**$2,869,349.37**	**($1,706,123.60)**	**-59.46%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$193,214.00	$335,428.64	($142,214.64)	-42.40%
8215 - Equipment Lease	$4,285.58	$682.70	$3,602.88	527.74%
8220 - Electric	$268,164.68	$365,609.64	($97,444.96)	-26.65%
8225 - Water	$55,996.20	$60,260.25	($4,264.05)	-7.08%
8230 - Trash	$41,946.58	$17,191.60	$24,754.98	143.99%
8235 - Sewer	$32,023.24	$4,013.51	$28,009.73	697.89%
8240 - Natural Gas	$21,565.27	$7,684.11	$13,881.16	180.65%
8245 - FURNITURE, APPLIANCES & EQUIPMENT - NOT CAPITALIZED	$1,004.85	$0.00	$1,004.85	0.00%
8250 - Equip & Over $5000.00 (Inv Items)	$528,610.09	$400,775.64	$127,834.45	31.90%
8255 - WX Tools & Equipment	$41,855.51	$1,084.17	$40,771.34	3,760.60%
8260 - Repair/Maint for Building/Equip	$1,071,041.57	$797,163.24	$273,878.33	34.36%
8265 - Construction Rehab & Renovation	$314,055.34	$376,041.70	($61,986.36)	-16.48%
8270 - Deprec & amort - allowable	$55,357.23	$0.00	$55,357.23	0.00%

FINANCIAL ROW	AMOUNT (JAN 2023 - DEC 2023)	COMPARATIVE AMOUNT (JAN 2022 - ADJUST 2022)	VARIANCE	% VARIANCE
8290 - Construction Leverage	$188,622.55	$43,225.82	$145,396.73	336.37%
Total - 8200 - Facility & equipment expenses	**$2,817,742.69**	**$2,409,161.02**	**$408,581.67**	**16.96%**
8300 - Travel & meetings expenses	**$629,712.76**	**$1,284,462.43**	**($654,749.67)**	**-50.97%**
8400 - Insurance Expense	$2,052,548.78	$2,018,236.29	$34,312.49	1.70%
8600 - Business expenses	**$8,063.62**	**$650.00**	**$7,413.62**	**1,140.56%**
8700 - Food Expenses	**$1,592,473.59**	**$1,676,290.87**	**($83,817.28)**	**-5.00%**
8800 - In-Kind Expenses	**$970,152.98**	**$1,198,713.48**	**($228,560.50)**	**-19.07%**
Total - Expense	**$25,658,435.37**	**$35,606,755.78**	**($9,948,320.41)**	**-27.94%**
Net Ordinary Income	**$3,870,607.35**	**$3,817,884.73**	**$52,722.62**	**1.38%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$1,683,635.90**	**$1,877,451.95**	**($193,816.05)**	**-10.32%**
Total - Other Expense	**$1,683,635.90**	**$1,877,451.95**	**($193,816.05)**	**-10.32%**
Net Other Income	**($1,683,635.90)**	**($1,877,451.95)**	**$193,816.05**	**-10.32%**
Net Income	**$2,186,971.45**	**$1,940,432.78**	**$246,538.67**	**12.71%**

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

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	$9,636,792.52
1020 - Payroll Account	$7,806.40
1021 - First United Accounts Payable	$213,736.61
1022 - First United TH Reserve	$139,341.24
1023 - First United General Escrow	$160,819.37
1024 - First United Marina License	$240.82
1025 - First United Deposit (PayPal)	$2,115.20
1028 - First United Unrestricted Funds CD	$815,029.94
1030 - Shamrock Bank - Clayton	$1,835.61
1040 - Petty Cash	$410.00
1050 - McCurtain County National Bank	$47,731.03
Total - 1000 - Cash	**$11,025,858.74**
Total Bank	**$11,025,858.74**
Accounts Receivable	
1100 - Receivables	
1110 - Accounts Receivable	$592,268.01
1120 - Due From (A/R)	$297,998.89
Total - 1100 - Receivables	**$890,266.90**
1300 - Other receivables	
1320 - Notes/loans receivable	$352,041.49
1321 - Loans Receivable from Belmont	$162,809.48
1322 - Loans Receivable from Clayton	$202,957.53
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	**$1,320,140.94**
Total Accounts Receivable	**$2,210,407.84**
Other Current Asset	
1400 - Other assets	
1450 - Prepaid Expenses	$51,246.22
1465 - Advances Paid	$347.60
Total - 1400 - Other assets	**$51,593.82**
1500 - Investments	
1530 - Property/Lots held for Sale	$520,721.32
1599 - Undeposited Funds	$164,290.54
Total - 1500 - Investments	**$685,011.86**
NS097 - Interfund Due to /Due from	($155,455.34)
Payroll Float	$2,442.38
Total Other Current Asset	**$583,592.72**
Total Current Assets	**$13,819,859.30**
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

FINANCIAL ROW	AMOUNT
Total - 1600 - Fixed operating assets	**$13,843,062.03**
1700 - Accum deprec - fixed operating assets	
1725 - Accum deprec - building	($5,594,074.69)
1735 - Accum amort - leasehold improvements	($2,053,452.27)
Total - 1700 - Accum deprec - fixed operating assets	**($7,647,526.96)**
Total Fixed Assets	**$6,195,535.07**
Total ASSETS	**$20,015,394.37**
Liabilities & Equity	
Current Liabilities	
Accounts Payable	
2000 - Payables	**($11,799.29)**
Total Accounts Payable	**($11,799.29)**
Other Current Liability	
2100 - Accrued liabilities	
2105 - Accrued Expense Payables	$659,814.00
2120 - Accrued Employee Benefits	$191,111.70
2130 - Accrued payroll taxes	$3,613.96
2150 - Home Loan Escrow Accounts	($580.61)
2160 - Due to (Liab)	$297,066.31
2180 - Accrued Payroll Deductions	($6,699.08)
Total - 2100 - Accrued liabilities	**$1,144,326.28**
2400 - Refundable Advances	**$7,100.67**
Total Other Current Liability	**$1,151,426.95**
Total Current Liabilities	**$1,139,627.66**
Long Term Liabilities	
2700 - Long-term notes & loans payable	
2770 - Long-term liabilities - Mower Loan	$4,100.28
Total - 2700 - Long-term notes & loans payable	**$4,100.28**
Total Long Term Liabilities	**$4,100.28**
Equity	**$18,871,666.43**
Total Liabilities & Equity	**$20,015,394.37**

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	$2,186,971.45
Adjustments to Net Income	
Accounts Receivable	($792,093.99)
Other Current Asset	$16,805.94
Accounts Payable	($113,218.22)
Sales Tax Payable	$457.67
Other Current Liabilities	$757,749.66
Total Adjustments to Net Income	**($130,298.94)**
Total Operating Activities	**$2,056,672.51**
Financing Activities	
Long Term Liabilities	($5,445.19)
Opening Balance Equity	$16,684.48
Other Equity	($425,079.92)
Total Financing Activities	**($413,840.63)**
Net Change in Cash for Period	**$1,642,831.88**
Cash at Beginning of Period	**$9,547,317.40**
Cash at End of Period	**$11,190,149.28**

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

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	**$25,000.00**	**$42,767.82**	**($17,767.82)**	**171.07%**
4100 - Inkind Revenue	**$952,223.51**	**$969,802.98**	**($17,579.47)**	**101.85%**
4200 - Miscellaneous Revenue	**$28,311.00**	**$3,840,210.46**	**($3,811,899.46)**	**13,564.38%**
4400 - State Revenue	**$2,289,909.74**	**$1,046,364.73**	**$1,243,545.01**	**45.69%**
4500 - Federal Revenue	**$27,811,441.01**	**$15,696,737.78**	**$12,114,703.23**	**56.44%**
4900 - Recoveries from Programs	**$1,677,332.00**	**$3,631,244.42**	**($1,953,912.42)**	**216.49%**
5000 - Rental Revenue	**$0.00**	**$654,115.50**	**($654,115.50)**	**0.00%**
5100 - Program Fee Revenue	**$450,250.00**	**$1,723,578.95**	**($1,273,328.95)**	**382.80%**
5300 - Interest and Dividends	**$500.04**	**$160,875.95**	**($160,375.91)**	**32,172.62%**
5400 - Revenue from other sources	**$105,397.92**	**$1,754,718.11**	**($1,649,320.19)**	**1,664.85%**
5800 - Special Event Expense	**$0.00**	**$8,795.33**	**($8,795.33)**	**0.00%**
Total - Income	**$33,340,365.22**	**$29,529,212.03**	**$3,811,153.19**	**88.57%**
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	**$33,340,365.22**	**$29,529,042.72**	**$3,811,322.50**	**88.57%**
Expense				
7000 - Grants, contracts, & direct assistance	**$178,085.00**	**$1,687,388.80**	**($1,509,303.80)**	**947.52%**
7200 - Salaries & related expenses	**$17,430,526.31**	**$11,136,021.46**	**$6,294,504.85**	**63.89%**
7300 - Indirect Cost Pool Expense	**$2,837,560.30**	**$1,832,467.99**	**$1,005,092.31**	**64.58%**
7500 - Contract/Consultant Services	**$2,530,528.36**	**$1,768,636.93**	**$761,891.43**	**69.89%**
8100 - Non personnel expenses	**$2,428,189.88**	**$1,163,225.77**	**$1,264,964.11**	**47.91%**
8200 - Facility & equipment expenses	**$3,091,986.70**	**$2,817,742.69**	**$274,244.01**	**91.13%**
8300 - Travel & meetings expenses	**$1,844,004.06**	**$629,712.76**	**$1,214,291.30**	**34.15%**
8400 - Insurance Expense	$255,176.84	$2,052,548.78	($1,797,371.94)	804.36%
8600 - Business expenses	**$0.00**	**$8,063.62**	**($8,063.62)**	**0.00%**
8700 - Food Expenses	**$94,970.00**	**$1,592,473.59**	**($1,497,503.59)**	**1,676.82%**
8800 - In-Kind Expenses	**$788,545.94**	**$970,152.98**	**($181,607.04)**	**123.03%**
Total - Expense	**$31,479,573.39**	**$25,658,435.37**	**$5,821,138.02**	**81.51%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$2,533,214.16**	**$1,683,635.90**	**$849,578.26**	**66.46%**
Total - Other Expense	**$2,533,214.16**	**$1,683,635.90**	**$849,578.26**	**66.46%**
Net Income	**($672,422.33)**	**$2,186,971.45**	**($2,859,393.78)**	**-325.24%**

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	$15,258.10	$0.00	$15,258.10
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$1,135,099.50	$0.00	$2,854.87	$0.00	$2,854.87
4400 - State Revenue	$921.25	$0.00	$148,552.90	$0.00	$148,552.90
4500 - Federal Revenue	$89,983.26	$0.00	$95,601.78	$0.00	$95,601.78
4900 - Recoveries from Programs	$59,304.63	$358.17	$3,571,581.62	$0.00	$3,571,939.79
5000 - Rental Revenue	$12,729.00	$0.00	$0.00	$240,184.58	$240,184.58
5100 - Program Fee Revenue	$41,942.51	$0.00	($150.00)	($150.00)	($300.00)
5300 - Interest and Dividends	$989.59	$0.00	$29,291.36	$1,533.20	$30,824.56
5400 - Revenue from other sources	$0.00	$0.00	$941,405.39	$0.00	$941,405.39
5800 - Special Event Expense	$310.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$1,342,358.74	$358.17	$4,804,396.02	$241,567.78	$5,046,321.97
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	$4,584.31	$0.00	$335,934.39	$0.00	$335,934.39
7200 - Salaries & related expenses	($2,601,224.38)	$383,047.66	$1,274,808.33	$0.00	$1,657,855.99
7300 - Indirect Cost Pool Expense	($433,819.22)	$4,147.00	$5,142.07	$0.00	$9,289.07
7500 - Contract/Consultant Services	$90,059.85	$34,800.00	$231,585.79	$133,531.21	$399,917.00
8100 - Non personnel expenses	$43,190.49	($1,800.69)	$153,322.93	$20,210.77	$171,733.01
8200 - Facility & equipment expenses	$312,343.56	$4,476.29	$63,685.17	$194,200.01	$262,361.47
8300 - Travel & meetings expenses	$29,553.54	$303.91	$65,288.87	$2,672.43	$68,265.21
8400 - Insurance Expense	$13,403.24	$954.00	$1,442,550.96	$54,930.03	$1,498,434.99
8600 - Business expenses	$0.00	$0.00	$0.00	$0.00	$0.00
8700 - Food Expenses	$137,591.44	$106.26	$11,590.04	$5.81	$11,702.11
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Expense	($2,404,317.17)	$426,034.43	$3,583,908.55	$405,550.26	$4,415,493.24
Net Ordinary Income	$3,746,675.91	($425,676.26)	$1,220,487.47	($163,982.48)	$630,828.73
Other Income and Expenses					
Other Expense					
8500 - Other Expense	$189,694.42	$11,411.48	$236,106.46	$1,093.26	$248,611.20
Total - Other Expense	$189,694.42	$11,411.48	$236,106.46	$1,093.26	$248,611.20

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

Financial Row	20 Early Childhood								
		CACFP - Daycare Homes	Early Head Start - CC	Early Learning Centers		HS/EHS EHS	Head Start	Total	Total
	Amount	Amount	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	$10,000.00	$10,000.00	$10,000.00
4100 - Inkind Revenue	$18,816.55	$0.00	$2,486.92	$0.00	$0.00	$89,832.91	$612,817.79	$702,650.70	$723,954.17
4200 - Miscellaneous Revenue	$52,863.74	$0.00	$0.00	$507,164.72	$1,737,571.16	$0.00	$66,190.25	$1,803,761.41	$2,363,789.87
4400 - State Revenue	$0.00	$0.00	$0.00	$0.00	$63,303.10	$115,097.05	$115,065.94	$293,466.09	$293,466.09
4500 - Federal Revenue	$187,576.36	$1,076,488.54	$2,051,459.00	$62,229.23	$224,983.15	$944,303.00	$3,578,121.57	$4,747,407.72	$8,125,160.85
4900 - Recoveries from Programs	$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
5100 - Program Fee Revenue	$2,628.30	$0.00	$0.00	$701,080.90	$0.00	$0.00	$0.00	$0.00	$703,709.20
5300 - Interest and Dividends	$24.46	$0.00	$0.00	$10,056.54	$18,538.37	$0.00	$0.00	$18,538.37	$28,619.37
5400 - Revenue from other sources	$0.00	$1,437.39	$0.00	$0.00	$2,044.34	$0.00	$0.00	$2,044.34	$3,481.73
5800 - Special Event Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$261,909.41	$1,077,925.93	$2,053,945.92	$1,280,531.39	$2,046,440.12	$1,149,232.96	$4,382,195.55	$7,577,868.63	$12,252,181.28
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
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Expense									
7000 - Grants, contracts, & direct assistance	$0.00	$1,437.39	$0.00	$0.00	$2,044.34	$0.00	$0.00	$2,044.34	$3,481.73
7200 - Salaries & related expenses	$1,370,730.15	$95,459.83	$547,838.97	$831,313.29	$490,863.72	$710,146.24	$2,392,017.71	$3,593,027.67	$6,438,369.91
7300 - Indirect Cost Pool Expense	$245,887.93	$18,967.20	$108,469.36	$135,815.84	$271,012.32	$138,812.68	$254,869.60	$664,694.60	$1,173,834.93
7500 - Contract/Consultant Services	$46,150.94	$6,297.56	$806,221.16	$2,533.46	$59,212.82	$7,792.10	$41,763.74	$108,768.66	$969,971.78
8100 - Non personnel expenses	$21,755.70	$4,663.06	$130,167.22	$68,099.61	$120,433.93	$48,225.18	$225,063.98	$393,723.09	$618,408.68
8200 - Facility & equipment expenses	$30,596.63	$4,488.00	$21,202.33	$27,030.05	$341,506.47	$25,001.38	$496,646.91	$863,154.76	$946,471.77
8300 - Travel & meetings expenses	$2,888.01	$20,484.98	$18,448.68	$9,305.02	$6,101.45	$5,880.78	$43,947.70	$55,929.93	$107,056.62
8400 - Insurance Expense	$0.00	$0.00	$18,826.17	$16,653.62	$0.00	$16,414.83	$77,110.87	$93,525.70	$129,005.49
8600 - Business expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8700 - Food Expenses	$167,718.75	$644,207.17	$141.78	$164,356.74	$213,804.94	$21,346.07	$218,569.14	$453,720.15	$1,430,144.59
8800 - In-Kind Expenses	$18,816.55	$0.00	$2,486.92	$0.00	$0.00	$89,832.91	$613,167.79	$703,000.70	$724,304.17
Total - Expense	$1,904,544.66	$796,005.19	$1,653,802.59	$1,255,107.63	$1,504,979.99	$1,063,452.17	$4,363,157.44	$6,931,589.60	$12,541,049.67
Net Ordinary Income	($1,642,635.25)	$281,920.74	$400,143.33	$25,423.76	$541,460.13	$85,780.79	$19,038.11	$646,279.03	($288,868.39)
Other Income and Expenses									
Other Expense									
8500 - Other Expense	$35,029.81	$542.57	$287,127.62	$9,997.45	$155,483.32	$38,801.89	$60,163.19	$254,448.40	$587,145.85
Total - Other Expense	$35,029.81	$542.57	$287,127.62	$9,997.45	$155,483.32	$38,801.89	$60,163.19	$254,448.40	$587,145.85

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	$1,585.00	$0.00	$0.00	$50.00	$0.00	$50.00	$0.00	$50.00	$0.00	$13,165.00	$0.00	$0.00	$0.00	$0.00	$1,415.00	$16,265.00
4100 - Inkind Revenue	$0.00	$0.00	$23,155.90	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$24,340.24	$0.00	$0.00	$0.00	$0.00	$9,336.16	$56,832.30
4200 - Miscellaneous Revenue	$170.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,170.00
4400 - State Revenue	$5,468.43	$1,192.58	$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	$130,860.89
4500 - Federal Revenue	$0.00	$10,000.00	$77,508.00	$7,400.00	$8,904.00	$16,304.00	$1,229,336.00	$51,600.00	$298,330.00	$63,909.00	$0.00	$244,135.63	$200,741.84	$222,733.16	$403,797.00	$2,878,513.63
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	$197.02	$19.23	$94.28	$33.97	$2.57	$36.54	$14.44	$150.88	$19.23	$21.07	$0.00	$0.00	$15.85	$553.05	$18.59	$1,184.48
5400 - Revenue from other sources	$7,500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$7,500.00	$5,000.00	$15,000.00	$0.00	$0.00	$5,000.00	$0.00	$0.00	$40,000.00
5800 - Special Event Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,895.33	$0.00	$0.00	$0.00	$0.00	$3,590.00	$8,485.33
Total - Income	$14,920.45	$11,211.81	$100,758.18	$7,483.97	$8,906.57	$16,390.54	$1,231,350.44	$59,300.88	$303,349.23	$121,330.64	$6,540.95	$244,135.63	$205,757.69	$317,036.21	$418,156.75	$3,050,239.40
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
Expense																
7000 - Grants, contracts, & direct assistance	$224.27	$2,356.12	$0.00	$11,531.39	$3,477.89	$15,009.28	$0.00	$0.00	$0.00	$0.00	$0.00	$72,688.47	$0.00	$1,536.13	$93.00	$96,737.93
7200 - Salaries & related expenses	$0.00	$982.81	$48,716.82	$0.00	$0.00	$0.00	$630,891.26	$24,927.25	$197,041.98	$54,286.82	$3,193.72	$128,119.10	$112,471.21	$113,072.19	$189,078.64	$2,002,708.09
7300 - Indirect Cost Pool Expense	$0.00	$209.77	$9,255.65	$0.00	$0.00	$0.00	$123,527.71	$5,765.25	$39,649.47	$11,677.16	$644.84	$26,357.17	$22,850.69	$20,136.50	$38,235.19	$388,139.38
7500 - Contract/Consultant Services	$308.00	$0.00	$0.00	$0.00	$0.00	$0.00	$71,554.00	$2,099.46	$32.98	$0.00	$0.00	$10,965.61	$9,850.00	$0.00	($22,390.12)	$114,623.40
8100 - Non personnel expenses	$2,760.01	$0.00	$4,144.78	$0.00	$0.00	$0.00	$61,828.22	$8,177.08	$17,435.38	$2,008.65	$422.76	($50,416.16)	$8,828.06	$182.18	$7,669.83	$103,997.51
8200 - Facility & equipment expenses	$2,496.00	$0.00	$0.00	$0.00	$0.00	$0.00	$28,133.00	$614.00	$7,980.00	$3,003.00	$0.00	$3,276.26	$4,440.00	$2,415.93	$8,913.90	$66,867.04
8300 - Travel & meetings expenses	$810.85	$0.00	$15,482.72	$0.00	$0.00	$0.00	$49,391.73	$1,302.87	$8,516.76	$2,903.87	$238.45	$10,523.10	$20,718.45	$5,159.36	$14,722.65	$139,218.00
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	$3,381.24	$0.00	$0.00	$7,708.28	$0.00	$0.00	$0.00	$0.00	$256.90	$11,829.18
8800 - In-Kind Expenses	$0.00	$0.00	$23,155.90	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$24,340.24	$0.00	$0.00	$0.00	$0.00	$9,336.16	$56,832.30
Total - Expense	$6,599.13	$3,548.70	$101,138.63	$11,531.39	$3,477.89	$15,009.28	$968,839.16	$42,885.91	$270,656.57	$107,806.22	$4,499.77	$201,513.55	$179,158.41	$142,502.29	$250,145.15	$2,294,302.77
Net Ordinary Income	$8,321.32	$7,663.11	($380.45)	($4,047.42)	$5,428.68	$1,381.26	$262,511.28	$16,414.97	$32,692.66	$13,524.42	$2,041.18	$42,622.08	$26,599.28	$174,533.92	$168,011.60	$755,936.63
Other Income and Expenses																
Other Expense																
8500 - Other Expense	$881.35	$930.00	$512.27	$0.00	$0.00	$0.00	$168,305.27	$2,786.56	$16,627.77	$5,634.22	$0.00	$4,875.72	$2,628.70	$0.00	$129,975.97	$348,626.49
Total - Other Expense	$881.35	$930.00	$512.27	$0.00	$0.00	$0.00	$168,305.27	$2,786.56	$16,627.77	$5,634.22	$0.00	$4,875.72	$2,628.70	$0.00	$129,975.97	$333,157.83

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

Financial Row	40 Housing Department							
		Apartments	Construction	HUD Apartments (Lift)	Housing	Self Help Housing	TMA	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense								
Income								
4000 - Contribution Revenue	$0.00	$0.00	$0.00	$0.00	$121.72	$0.00	$0.00	$121.72
4100 - Inkind Revenue	$0.00	$26,373.28	$162,643.23	$0.00	$0.00	$0.00	$0.00	$189,016.51
4200 - Miscellaneous Revenue	$13,225.46	$162.00	$0.00	$0.00	$188,601.33	$0.00	$0.00	$201,988.79
4400 - State Revenue	$7,515.00	$0.00	$0.00	$0.00	$10,386.60	$0.00	$0.00	$17,901.60
4500 - Federal Revenue	$38,816.36	$165,492.66	$502,359.28	$0.00	$552,740.45	$646,175.00	$1,346,211.51	$3,251,795.26
4900 - Recoveries from Programs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5000 - Rental Revenue	$16,224.00	$384,977.92	$0.00	$0.00	$0.00	$0.00	$0.00	$401,201.92
5100 - Program Fee Revenue	$4,614.84	$5,891.82	($514.87)	$24,383.05	$139,127.02	$0.00	$0.00	$173,501.86
5300 - Interest and Dividends	$165,547.00	($109,393.46)	($48.00)	$0.00	$12,315.77	$0.00	$938.83	$69,360.14
5400 - Revenue from other sources	$0.00	$13,000.00	$0.00	$0.00	$503,434.39	$0.00	$0.00	$516,434.39
5800 - Special Event Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$245,942.66	$486,504.22	$664,439.64	$24,383.05	$1,406,727.28	$646,175.00	$1,347,150.34	$4,821,322.19
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
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Expense								
7000 - Grants, contracts, & direct assistance	$179,819.00	($117,009.00)	$0.00	$0.00	$81,321.03	$0.00	$630,167.33	$774,298.36
7200 - Salaries & related expenses	$352,952.35	$41,043.84	$355,151.69	$5,607.88	$295,130.27	$430,471.58	$543,390.15	$2,023,747.76
7300 - Indirect Cost Pool Expense	$63,878.86	$8,554.67	$67,995.66	$6,264.78	$43,541.92	$85,690.07	$109,073.90	$384,999.86
7500 - Contract/Consultant Services	$4,520.08	$35,085.80	$20,383.50	$0.00	$27,742.64	$688.39	$10,998.82	$99,419.23
8100 - Non personnel expenses	$24,806.78	$5,993.32	$33,754.83	($71.93)	$36,945.17	$7,109.44	$23,272.52	$131,810.13
8200 - Facility & equipment expenses	$123,295.08	$343,825.25	$242,346.76	$148.09	$150,719.46	$21,931.17	$14,348.99	$896,614.80
8300 - Travel & meetings expenses	$7,860.59	$6,041.08	$9,668.05	($382.30)	$21,993.64	$26,424.32	$62,890.22	$134,495.60
8400 - Insurance Expense	$0.00	$141,250.23	$2,173.00	($252.82)	$16,061.32	$147.00	$0.00	$159,378.73
8600 - Business expenses	$0.00	$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	$0.00	$737.14	$0.00	$0.00	$737.14
8800 - In-Kind Expenses	$0.00	$26,373.28	$162,643.23	$0.00	$0.00	$0.00	$0.00	$189,016.51
Total - Expense	$757,132.74	$499,222.09	$894,116.72	$11,313.70	$674,192.59	$572,461.97	$1,394,141.93	$4,802,581.74
Net Ordinary Income	($511,190.08)	($12,717.87)	($229,677.08)	$13,069.35	$732,534.69	$73,713.03	($46,991.59)	$18,740.45
Other Income and Expenses								
Other Expense								
8500 - Other Expense	$44,491.67	$13,708.76	$46,616.34	$168.00	$109,964.47	$5,728.09	$23,214.75	$243,892.08
Total - Other Expense	$44,491.67	$13,708.76	$46,616.34	$168.00	$109,964.47	$5,728.09	$23,214.75	$243,892.08

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

Financial Row		50 Transportation	
		Transit	Total
	Amount	Amount	Amount
Ordinary Income/Expense			
Income			
4000 - Contribution Revenue	$0.00	$0.00	$0.00
4100 - Inkind Revenue	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$121,982.43	$121,982.43
4400 - State Revenue	$284,319.00	$52,387.00	$336,706.00
4500 - Federal Revenue	$0.00	$1,205,683.00	$1,205,683.00
4900 - Recoveries from Programs	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$0.00	$0.00
5100 - Program Fee Revenue	$247.00	$377,622.78	$377,869.78
5300 - Interest and Dividends	$0.00	$1,701.82	$1,701.82
5400 - Revenue from other sources	$0.00	$250,498.22	$250,498.22
5800 - Special Event Expense	$0.00	$0.00	$0.00
Total - Income	$284,566.00	$2,009,875.25	$2,294,441.25
8000 - Cost of Goods Sold			
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00
Expense			
7000 - Grants, contracts, & direct assistance	$0.00	$250,498.22	$250,498.22
7200 - Salaries & related expenses	$307,990.31	$873,582.33	$1,181,572.64
7300 - Indirect Cost Pool Expense	$56,293.17	$171,175.04	$227,468.21
7500 - Contract/Consultant Services	$270.24	$23,879.98	$24,150.22
8100 - Non personnel expenses	$10,235.17	$43,740.20	$53,975.37
8200 - Facility & equipment expenses	$8,773.15	$139,103.92	$147,877.07
8300 - Travel & meetings expenses	$4,557.75	$133,656.91	$138,214.66
8400 - Insurance Expense	$0.00	$160,372.56	$160,372.56
8600 - Business expenses	$0.00	$0.00	$0.00
8700 - Food Expenses	$0.00	$0.00	$0.00
8800 - In-Kind Expenses	$0.00	$0.00	$0.00
Total - Expense	$388,119.79	$1,796,009.16	$2,184,128.95
Net Ordinary Income	($103,553.79)	$213,866.09	$110,312.30
Other Income and Expenses			
Other Expense			
8500 - Other Expense	$0.00	$15,741.08	$15,741.08
Total - Other Expense	$0.00	$15,741.08	$15,741.08

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

Financial Row	60 Economic Development							
		Economic Development/Lending		Clayton Lake	State Parks Hugo Lake	Raymond Gary	Total	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense								
Income								
4000 - Contribution Revenue	$0.00	$0.00	$0.00	$1.00	$0.00	$43.00	$44.00	$44.00
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$0.00	$0.00	$120.00	$12,205.00	$0.00	$12,325.00	$12,325.00
4400 - State Revenue	$4,752.50	$0.00	$0.00	$52,277.50	$0.00	$60,926.00	$113,203.50	$117,956.00
4500 - Federal Revenue	$0.00	$50,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$50,000.00
4900 - Recoveries from Programs	$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
5100 - Program Fee Revenue	$1,409.68	$20,733.11	$1,297.46	$34,122.28	$283,645.82	$85,647.25	$404,712.81	$426,855.60
5300 - Interest and Dividends	$706.32	$23,044.56	$0.00	$0.00	$3,838.97	$606.14	$4,445.11	$28,195.99
5400 - Revenue from other sources	$233.35	$0.00	$222.28	$0.00	$2,374.75	$68.00	$2,665.03	$2,898.38
5800 - Special Event Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$7,101.85	$93,777.67	$1,519.74	$86,520.78	$302,064.54	$147,290.39	$537,395.45	$638,274.97
8000 - Cost of Goods Sold								
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$169.31	$0.00	$169.31	$169.31
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$169.31	$0.00	$169.31	$169.31
Expense								
7000 - Grants, contracts, & direct assistance	$0.00	$221,853.86	$0.00	$0.00	$0.00	$0.00	$0.00	$221,853.86
7200 - Salaries & related expenses	$191,414.62	$4,550.62	$0.00	$57,733.63	$106,351.21	$72,941.37	$237,026.21	$432,991.45
7300 - Indirect Cost Pool Expense	$35,091.35	$948.22	$0.00	$11,549.24	$20,755.30	$14,211.65	$46,516.19	$82,555.76
7500 - Contract/Consultant Services	$9,499.35	$0.00	$0.00	$0.00	$54,076.10	$6,920.00	$60,996.10	$70,495.45
8100 - Non personnel expenses	$9,362.51	$0.00	$0.00	$2,088.51	$24,660.78	$3,998.78	$30,748.07	$40,110.58
8200 - Facility & equipment expenses	$84,488.69	$0.00	$0.00	$16,622.31	$64,666.11	$19,429.87	$100,718.29	$185,206.98
8300 - Travel & meetings expenses	$4,209.55	$0.00	$0.00	$1,613.42	$4,810.33	$2,275.83	$8,699.58	$12,909.13
8400 - Insurance Expense	$0.00	$0.00	$0.00	$4,476.26	$72,273.92	$8,964.39	$85,714.57	$85,714.57
8600 - Business expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8700 - Food Expenses	$0.00	$0.00	$0.00	$0.00	$469.13	$0.00	$469.13	$469.13
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Expense	$334,066.07	$227,352.70	$0.00	$94,083.37	$348,062.88	$128,741.89	$570,888.14	$1,132,306.91
Net Ordinary Income	($326,964.22)	($133,575.03)	$1,519.74	($7,562.59)	($46,167.65)	$18,548.50	($33,662.00)	($494,201.25)
Other Income and Expenses								
Other Expense								
8500 - Other Expense	$1,347.32	$0.00	$0.00	$4,813.06	$33,591.68	$10,172.72	$48,577.46	$49,924.78
Total - Other Expense	$1,347.32	$0.00	$0.00	$4,813.06	$33,591.68	$10,172.72	$48,577.46	$49,924.78

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

NAME	AMOUNT (GROSS)
CAPITAL ONE	$5,990.30
DAVISON FUELS & OIL, LLC	$6,574.87
HOME DEPOT BRC/GECF	$3,134.42
TCM BANK NA	$21,020.87
WAL-MART COMMUNITY BRC	$5,234.67
Total	**$41,955.13**

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

Program	Facility & equipment expenses			Food Expenses				Grants, contracts, & direct assistance	Non personnel expenses							Other Expense						Travel & meetings expenses					Total
	Repair/Maint for Building/Equip	WX Tools & Equipment	Total	Food Nutrition Cost	Non -Food, Nutrition Cost	Other Food Expense	Total	VICTIM ASSISTANCE	Events/Meeting Expense	Medical/Dental Supplies	Office/Teaching Supplies	Other/Maint Supplies	Telephone & Internet	Total	Computer & Software Related Expenses	Fees/Dues	Other Expenses	Recognition	Training & TTA	Total	Fuel Cost	Non Reimb Travel	Out of Area Travel	Total	
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Administration			$0.00			$1,284.79	$1,284.79		$82.53		$1,031.20			$1,113.73	$882.43	$2,107.39	$606.55	$663.04	$0.00	$4,259.41			$125.76	$125.76	$125.76	$6,783.69
Apartments			$0.00				$0.00							$0.00						$0.00	$94.76			$94.76	$94.76	$94.76
CASA			$0.00				$0.00							$0.00		$275.00				$275.00				$0.00	$275.00	$275.00
Early Head Start			$0.00			($164.41)	($164.41)				($56.80)			($56.80)						$0.00				$0.00	($221.21)	($221.21)
Early Head Start Child Care			$0.00				$0.00							$0.00		$54.25			$2,388.00	$2,442.25	$108.16			$108.16	$2,550.41	$2,550.41
Early Learning Centers			$0.00	$226.27	$205.77	$162.40	$594.44				$803.23			$803.23		$650.00			$853.50	$1,503.50				$0.00	$2,901.17	$2,901.17
Head Start			$0.00		$897.23	$648.22	$1,545.45		$123.27	$83.51	$903.56	$419.24		$1,529.58	$14.98	$645.25	$70.40	$173.36	$1,295.00	$2,198.99	$519.90			$519.90	$5,793.92	$5,793.92
Healthy Start			$0.00			$1,376.13	$1,376.13							$0.00						$0.00				$0.00	$1,376.13	$1,376.13
Housing	$178.80	$90.00	$268.80				$0.00							$0.00	$57.96	$3,050.05			$225.98	$3,333.99	$662.50			$662.50	$4,265.29	$4,265.29
Safe Place Healing Hearts			$0.00				$0.00	$225.00						$0.00						$0.00				$0.00	$225.00	$225.00
Second Chance			$0.00				$0.00				$54.32			$54.32						$0.00			$1,905.36	$1,905.36	$1,959.68	$1,959.68
Self-Help Housing			$0.00				$0.00							$0.00						$0.00	$35.31			$35.31	$35.31	$35.31
State Park Operations	$691.82		$691.82				$0.00		$169.74		$15.27	$853.14	$848.69	$1,886.84		$530.19				$530.19	$330.87			$330.87	$3,439.72	$3,439.72
T&MA			$0.00				$0.00							$0.00	$135.92	$353.94				$489.86		$3,138.40		$3,138.40	$3,628.26	$3,628.26
Transit			$0.00				$0.00		$75.75		$92.38			$168.13		$40.00				$40.00	$4,666.54			$4,666.54	$4,874.67	$4,874.67
Tri-CORPS			$0.00				$0.00				$26.20			$26.20						$0.00				$0.00	$26.20	$26.20
Youth Build			$0.00				$0.00				$413.74			$413.74			$192.14		$990.00	$1,182.14	$116.83			$116.83	$1,712.71	$1,712.71
Total	**$870.62**	**$90.00**	**$960.62**	**$226.27**	**$1,103.00**	**$3,307.13**	**$4,636.40**	**$225.00**	**$451.29**	**$83.51**	**$3,283.10**	**$1,272.38**	**$848.69**	**$5,938.97**	**$1,091.29**	**$7,706.07**	**$869.09**	**$836.40**	**$5,752.48**	**$16,255.33**	**$6,534.87**	**$3,138.40**	**$2,031.12**	**$11,704.39**	**$39,720.71**	**$39,720.71**

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

EHS CC 23-24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	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**	**$786,372.00**	**$1,430,373.00**	**35.47%**
Total - Income	**$2,216,745.00**	**$786,908.41**	**$1,429,836.59**	**35.50%**
Gross Profit	**$2,216,745.00**	**$786,908.41**	**$1,429,836.59**	**35.50%**
Expense				
7200 - Salaries & related expenses	**$610,157.00**	**$230,644.16**	**$379,512.84**	**37.80%**
7300 - Indirect Cost Pool Expense	**$123,968.00**	**$46,638.64**	**$77,329.36**	**37.62%**
7500 - Contract/Consultant Services	**$1,016,075.00**	**$373,672.06**	**$642,402.94**	**36.78%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$64,000.00	$66,201.74	($2,201.74)	103.44%
8120 - Other/Maint Supplies	$5,000.00	$325.05	$4,674.95	6.50%
8130 - Telephone & Internet	$14,400.00	$1,824.19	$12,575.81	12.67%
8140 - Postage & shipping	$0.00	$78.12	($78.12)	0.00%
8150 - Medical/Dental Supplies	$1,000.00	$471.49	$528.51	47.15%
8160 - Events/Meeting Expense	$0.00	$16.65	($16.65)	0.00%
8170 - Printing & copying	$15,000.00	$2,102.09	$12,897.91	14.01%
8180 - Fatherhood	$2,000.00	$0.00	$2,000.00	0.00%
Total - 8100 - Non personnel expenses	**$101,400.00**	**$71,019.33**	**$30,380.67**	**70.04%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$224.96	($224.96)	0.00%
8220 - Electric	$720.00	$3,864.07	($3,144.07)	536.68%
8225 - Water	$500.00	$66.52	$433.48	13.30%
8230 - Trash	$300.00	$297.43	$2.57	99.14%
8235 - Sewer	$300.00	$30.66	$269.34	10.22%
8240 - Natural Gas	$500.00	$108.88	$391.12	21.78%
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	$2,131.94	$45,118.06	4.51%
Total - 8200 - Facility & equipment expenses	**$171,692.00**	**$6,724.46**	**$164,967.54**	**3.92%**
8300 - Travel & meetings expenses	**$17,750.00**	**$6,991.69**	**$10,758.31**	**39.39%**
8400 - Insurance Expense	$6,300.00	$8,286.51	($1,986.51)	131.53%
8700 - Food Expenses	**$3,000.00**	**$141.78**	**$2,858.22**	**4.73%**
8800 - In-Kind Expenses	**$0.00**	**$536.41**	**($536.41)**	**0.00%**
Total - Expense	**$2,050,342.00**	**$744,655.04**	**$1,305,686.96**	**36.32%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	$25,000.00	$9,093.00	$15,907.00	36.37%
8530 - Fees/Dues	$1,500.00	$769.45	$730.55	51.30%
8540 - Training & TTA	$42,863.00	$12,930.70	$29,932.30	30.17%
8560 - Computer & Software Related Expenses	$0.00	$6.12	($6.12)	0.00%
8570 - Advertising & Community Sponsorships	$7,500.00	$3,142.37	$4,357.63	41.90%
8590 - Other Expenses	$2,000.00	$0.00	$2,000.00	0.00%
8595 - Subsidy Expense	$89,540.00	$67,519.30	$22,020.70	75.41%
Total - 8500 - Other Expense	**$168,403.00**	**$93,460.94**	**$74,942.06**	**55.50%**
Total - Other Expense	**$168,403.00**	**$93,460.94**	**$74,942.06**	**55.50%**
Net Income	**($2,000.00)**	**($51,207.57)**	**$49,207.57**	**2,560.38%**

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

HS 23-24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4500 - Federal Revenue	**$0.00**	**$132,170.00**	**($132,170.00)**	**0.00%**
Total - Income	**$0.00**	**$132,170.00**	**($132,170.00)**	**0.00%**
Gross Profit	**$0.00**	**$132,170.00**	**($132,170.00)**	**0.00%**
Expense				
7200 - Salaries & related expenses	**$0.00**	**$132,985.53**	**($132,985.53)**	**0.00%**
7300 - Indirect Cost Pool Expense	**$0.00**	**$27,846.02**	**($27,846.02)**	**0.00%**
7500 - Contract/Consultant Services	**$0.00**	**$1,428.43**	**($1,428.43)**	**0.00%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$0.00	$12,593.34	($12,593.34)	0.00%
8130 - Telephone & Internet	$0.00	$3,099.77	($3,099.77)	0.00%
8140 - Postage & shipping	$0.00	$15.84	($15.84)	0.00%
8150 - Medical/Dental Supplies	$0.00	$105.22	($105.22)	0.00%
8170 - Printing & copying	$0.00	$680.94	($680.94)	0.00%
Total - 8100 - Non personnel expenses	**$0.00**	**$16,495.11**	**($16,495.11)**	**0.00%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$235.00	($235.00)	0.00%
8220 - Electric	$0.00	$1,136.75	($1,136.75)	0.00%
8225 - Water	$0.00	$311.46	($311.46)	0.00%
8230 - Trash	$0.00	$688.83	($688.83)	0.00%
8235 - Sewer	$0.00	$267.38	($267.38)	0.00%
8240 - Natural Gas	$0.00	$25.95	($25.95)	0.00%
8260 - Repair/Maint for Building/Equip	$0.00	$812.88	($812.88)	0.00%
Total - 8200 - Facility & equipment expenses	**$0.00**	**$3,478.25**	**($3,478.25)**	**0.00%**
8300 - Travel & meetings expenses	**$0.00**	**$3,912.14**	**($3,912.14)**	**0.00%**
8400 - Insurance Expense	$0.00	$7,718.06	($7,718.06)	0.00%
8700 - Food Expenses	**$0.00**	**($2,281.58)**	**$2,281.58**	**0.00%**
Total - Expense	**$0.00**	**$191,581.96**	**($191,581.96)**	**0.00%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8530 - Fees/Dues	$0.00	$216.00	($216.00)	0.00%
8540 - Training & TTA	$0.00	$505.70	($505.70)	0.00%
8570 - Advertising & Community Sponsorships	$0.00	$331.41	($331.41)	0.00%
Total - 8500 - Other Expense	**$0.00**	**$1,053.11**	**($1,053.11)**	**0.00%**
Total - Other Expense	**$0.00**	**$1,053.11**	**($1,053.11)**	**0.00%**
Net Income	**$0.00**	**($60,465.07)**	**$60,465.07**	**0.00%**

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

EHS 23-24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4500 - Federal Revenue	**$0.00**	**$32,417.00**	**($32,417.00)**	**0.00%**
Total - Income	**$0.00**	**$32,417.00**	**($32,417.00)**	**0.00%**
Gross Profit	**$0.00**	**$32,417.00**	**($32,417.00)**	**0.00%**
Expense				
7200 - Salaries & related expenses	**$0.00**	**$32,133.83**	**($32,133.83)**	**0.00%**
7300 - Indirect Cost Pool Expense				
7310 - Indirect Expense	$0.00	$6,215.77	($6,215.77)	0.00%
Total - 7300 - Indirect Cost Pool Expense	**$0.00**	**$6,215.77**	**($6,215.77)**	**0.00%**
7500 - Contract/Consultant Services	**$0.00**	**$300.80**	**($300.80)**	**0.00%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$0.00	$1,400.86	($1,400.86)	0.00%
8130 - Telephone & Internet	$0.00	$304.82	($304.82)	0.00%
8140 - Postage & shipping	$0.00	$3.39	($3.39)	0.00%
8150 - Medical/Dental Supplies	$0.00	$4.65	($4.65)	0.00%
8170 - Printing & copying	$0.00	$138.80	($138.80)	0.00%
Total - 8100 - Non personnel expenses	**$0.00**	**$1,852.52**	**($1,852.52)**	**0.00%**
8200 - Facility & equipment expenses				
8220 - Electric	$0.00	$465.00	($465.00)	0.00%
8225 - Water	$0.00	$75.81	($75.81)	0.00%
8230 - Trash	$0.00	$52.06	($52.06)	0.00%
8235 - Sewer	$0.00	$17.58	($17.58)	0.00%
8240 - Natural Gas	$0.00	$13.26	($13.26)	0.00%
8260 - Repair/Maint for Building/Equip	$0.00	$23.28	($23.28)	0.00%
Total - 8200 - Facility & equipment expenses	**$0.00**	**$646.99**	**($646.99)**	**0.00%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$0.00	$396.26	($396.26)	0.00%
8320 - Out of Area Travel	$0.00	$78.14	($78.14)	0.00%
8330 - Fuel Cost	$0.00	$43.28	($43.28)	0.00%
Total - 8300 - Travel & meetings expenses	**$0.00**	**$517.68**	**($517.68)**	**0.00%**
8400 - Insurance Expense	$0.00	$1,654.63	($1,654.63)	0.00%
8700 - Food Expenses	**$0.00**	**($588.27)**	**$588.27**	**0.00%**
Total - Expense	**$0.00**	**$42,733.95**	**($42,733.95)**	**0.00%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8530 - Fees/Dues	$0.00	$54.25	($54.25)	0.00%
8540 - Training & TTA	$0.00	$1,039.10	($1,039.10)	0.00%
8570 - Advertising & Community Sponsorships	$0.00	$71.06	($71.06)	0.00%
Total - 8500 - Other Expense	**$0.00**	**$1,164.41**	**($1,164.41)**	**0.00%**
Total - Other Expense	**$0.00**	**$1,164.41**	**($1,164.41)**	**0.00%**
Net Income	**$0.00**	**($11,481.36)**	**$11,481.36**	**0.00%**

Carolyn Watson RURAL Oklahoma Community Foundation
An Affiliate of the OKLAHOMA CITY COMMUNITY FOUNDATION

1000 N. Broadway Ave.
Oklahoma City, OK 73102

405.235.5603 · occf.org

RURAL OKLAHOMA COMMUNITY GRANTS

2024 Grant Guidelines

IMPORTANT DATES & DEADLINES

Grant Application Opens: Wednesday, December 13, 2023
Grant Information Meeting (Zoom): 3 p.m. on Tuesday, January 9, 2024 (register here)
Letter of Intent (LOI) Deadline: 5 p.m. on Friday, February 9, 2024
Grant Application Deadline: 5 p.m. on Friday, February 16, 2024

GRANT RANGE: Up to $40,000

PROGRAM OVERVIEW

The Carolyn Watson Rural Oklahoma Community Foundation was established in 1995 by Carolyn Watson, the CEO and chairman of Shamrock Bank N.A. To date, the foundation has distributed more than $3 million to support nonprofit organizations in their efforts to enhance the quality of life in rural Oklahoma communities. The foundation's grant programs are administered by the Oklahoma City Community Foundation. For more information, visit www.occf.org/ruraloklahoma.

GEOGRAPHIC FOCUS

501(c)(3) nonprofit organizations serving rural communities within the following Oklahoma counties: **ADAIR**, **ATOKA**, **BRYAN**, **CADDO**, **CHEROKEE**, **CHOCTAW**, **COAL**, **HASKELL**, **JOHNSTON**, **KIOWA**, **LATIMER**, **MCCURTAIN**, **MCINTOSH**, **OKFUSKEE**, OR **PUSHMATAHA**.

NOTE: Priority will be given to projects targeting cities or towns with populations under 6,000.

FUNDING CATEGORIES

1) Arts, Culture & History
2) Health & Safety
3) Libraries & Literacy
4) Economic Development

CATEGORY 1: ARTS, CULTURE & HISTORY

- **Education and Access:** Initiatives to enhance education, public engagement, and access to arts, culture, and history.
- **Cultural and Historical Preservation and Enhancement:** Initiatives dedicated to preserving and celebrating the unique culture, history, and heritage of rural communities.

CATEGORY 2: HEALTH & SAFETY

- **Direct Health Services:** Initiatives providing essential health services to underserved or uninsured community members.
- **Healthcare Access and Capacity Enhancement:** Projects that improve access to health services or strengthen the public health workforce.
- **Community Safety and Security:** Projects aimed at enhancing local emergency and safety services, with an emphasis on supporting fire departments, EMS, and police departments.

CATEGORY 3: LIBRARIES & LITERACY

- **Library Enhancement:** Initiatives to strengthen rural libraries as key community and knowledge centers.
- **Community-based Literacy Programs:** Initiatives that take place outside of the formal education system to address community literacy needs. This can include early childhood and family literacy, tutoring programs, GED preparation, adult literacy, and English as a Second Language (ESL) programming.

CATEGORY 4: ECONOMIC DEVELOPMENT

- Programs that promote economic growth and stability in rural areas through workforce development, entrepreneurship support, vocational training in areas such as business planning, financial literacy, and technology, and community asset enhancement to attract investments.

ELIGIBILITY

- 501(c)(3) nonprofit organizations that serve one or more of the eligible Oklahoma counties.
- Nonexempt organizations that qualify for the use of charitable dollars such as museums, libraries, schools, and other state or local government agencies may apply if the funding request is for public programs that take place in eligible Oklahoma counties.
- Grants will not be made to individuals or private foundations.

FUNDING LIMITATIONS

Funding for the following items is generally not considered:

- Fundraising events/activities.
- Capital campaigns.
- Vehicle purchases.
- Retroactive projects.
- Equipment unless central to the success of the project.

APPLICATION PROCESS

1) Submit a Letter of Intent (LOI)

All potential applicants must fill out an online LOI form **no later than 5:00 p.m. on Friday, February 9, 2024**. To complete an LOI, go to our online grant portal (click here) and refer to the instructions on the homepage to log in. Once logged in, you will select the "Apply" icon in the top left-hand corner of your screen and input the access code **ROCOMM24**. Please direct all login and access questions to Keaton Van Sickle at k.vansickle@occf.org.

2) Complete an Official Application

If you meet the eligibility requirements, you will receive an email granting you access to the official application. The deadline to apply is **5:00 p.m. on Friday, February 16, 2024**.

QUESTIONS?

Contact Leslie Woodward at L.woodward@occf.org / (405) 606-2911.

FAQs

If my organization received a Rural Oklahoma Community Grant last year, am I eligible to apply again this year?

Yes, you may apply if the following conditions have been met:

- The funds from your previous grant have been fully expended.
- All follow-up evaluation reports have been submitted.

When will I be notified of a funding decision?

All applicants will be notified of a decision by the end of March 2024 following the semi-annual Carolyn Watson Trustee meeting.

What is the timeline to implement my project/expend the awarded grant funds?

You may start your activities shortly after you receive notification of your award (late March 2024). If you would like to align your timeline with our funding cycle (outlined below), you will have approximately 11 months to finalize your project activities, utilize the awarded funds, and submit your final evaluation report. Please note that aligning your activities with our funding cycle is optional, but you will not be eligible for another grant until the conditions of the grant agreement are met.

Carolyn Watson Rural Oklahoma Community Grants Program Timeline (2024-25):

- **December 13, 2023 – February 16, 2023:** Application submissions
- **February – March 2024:** Internal and external application review process (all current grantees who intend to reapply for funding must submit final evaluations)
- **Late March 2024:** Trustee meeting and grant award notifications
- **April 2024 – late February 2025:** Project implementation

Can I submit more than one application?

Yes, but due to funding limitations, we are only able to award one grant per organization per funding cycle.

Can I request funding for the same program or project that I previously received a grant for?

Yes. Ongoing projects and programs are eligible for renewed funding.

Potts Family Foundation Grant Notification
Potts Family Foundation <administrator@grantinterface.com>
Thu 11/16/2023 3:33 PM

11/16/2023

Hello again, LIFT Community Action Agency, Inc., and thank you for the critical work that you do. **We were honored to support your mission and your ongoing work with our grant in the amount of $10,000.00 used for the Families Learning Together.**

Please Logon to your Foundant account to complete and submit the Grant Agreement by December 15, 2023. After the Agreement is complete, we will process your check as soon as possible. You will also find the **Mid-Year Grant Evaluation** available to fill out by **July 31, 2024**.

Please Logon to your account to complete and submit the Final Grant Evaluation by January 31, 2025. The purpose of this is to learn how your Potts Family Foundation funded project(s) has progressed over the past year and any challenges or changes that you have faced related to the project(s).

Please keep in mind that the focus of our work is:

- Access to Evidence Based Literacy/Numeracy programs
- Access to Affordable, High Quality Child Care
- Access to Affordable Preventive Health Care (includes Brain Health)
- Access to Evidence Based Family Support (home-based) Programs

And our two major program areas are:

- Family Positive Workplace practices

and

- Raising Resilient Oklahomans (practices aimed at reducing or mitigating Adverse Childhood Experiences).

Also, if you are willing to write up a short article for our monthly bulletin, we would love to add it and share with our Board. No deadline for the article, if you choose to write one. Let us know if you have any questions--email Cassady and he'll be happy to help.

The Potts Family Foundation

Powers, Responsibilities, and Role of the Board

LIFT Community Action Agency's Board of Directors shall possess the following specific powers:

- Appointing an Executive Director;
- Evaluating the Executive Director annually;
- Determining the rules of procedures for the Board;
- Determining the policies under which the Board and Agency shall operate;
- Determining within regulations and policies, the major fiscal, personnel, and program policies;
- Reviewing and approving programs and expenditures;
- Considering and approving all program proposals and budgets;
- Enforcing compliance with all conditions on grants;
- Determining overall program plans and priorities;
- Determining the use of all discretionary money;
- Compliance with the Oklahoma Open Meeting Act, 25 O.S. §301, et seq., as revised, and Oklahoma Open Records Act, 51 O.S. §24A.1, et seq.; and
- Compliance with the Code of Conduct.

The role of the Board shall include, but not be limited, to:

- Being a catalyst for positive change in the community;
- Bringing the problems and needs of the community to the Board for discussion;
- Looking at options for solving some of the problems or fulfilling the needs of the community;
- Examining issues affecting the quality of life in the community;
- Raising money;
- Serving as an advocate for clients and being a catalyst for institutional change in institutions that serve them;
- Serving as a link between the Board of Directors and the people or groups represented;
- Serving as a good public relations advocate for the programs, projects, and activities of the Agency;
- Recruiting volunteers and space for programs and activities; and
- Mobilizing resources for the entire community.

Role of the Tripartite Board

A nonprofit board generally has the authority under its state nonprofit corporation act to manage all of the affairs of the organization. Legally, this means that the tripartite board **IS** the organization. Thus, it is crucial that board members understand the legal obligations that arise from this very crucial role that they play.

Under state law, every board member of a nonprofit CAA is a fiduciary of the organization and thus, owes a duty of care and a duty of loyalty to the organization.

The duty of care is a standard of diligence. Generally, board members are not subject to liability for decisions made as board members of an organization if the board has exercised the duty of care. The duty of care is a requirement to exercise **diligence and deliberation** – board decisions must be made via a deliberative process. Assessing whether board members have fulfilled their duty of care involves asking questions such as – was a decision based on facts that were developed through an orderly process, or did the board just do what felt right at the time of the decision?

The **duty of care** is evaluated from a **reasonable person standard** – a board member must exercise the care that an ordinarily prudent person would exercise under similar circumstances. Attending board meetings, reading board materials, asking hard questions are all factors that are considered when determining if a board member has met his/her duty of care.

Even if the board's decision turns out to be a bad one, it has discharged its duty of care if the decision was the result of a deliberative process that involved a weighing of facts and alternatives.

The **duty of loyalty** is a standard of faithfulness – a board member must give **undivided allegiance** to the CAA and its mission when making decisions affecting the agency. This means that a board member can never use information obtained as a board member for personal gain (or self-dealing), but must act in the best interests of the agency. Board members must disclose and avoid conflicts of interest and recuse themselves from any decisions that might result in personal benefit.

The **duty of obedience** means that board directors must make sure that the nonprofit is **abiding by all applicable laws and regulations** and doesn't engage in illegal or unauthorized activities. The duty of obedience also means that board directors must carry out the organization's mission in accordance with the purpose they stated in getting qualified as a nonprofit organization.

Key Board Responsibilities

Unpacking what it means for board members to manage all the affairs of a nonprofit corporation can seem daunting and overwhelming. For nonprofit CAAs, a board member's responsibilities are often driven by the requirements of the state and federal funding they receive. For example, the federal CSBG Act requires board members to be fully engaged in the development, planning, implementation and evaluation of the CSBG program.

The following summarizes a Board's responsibilities as managers of the corporation and pursuant to funding source directives by focusing on key responsibilities that encompass many of the actions board members must take to effectively fulfill their duties.

Engaged boards acting and monitoring in the following six key areas are likely to be meeting and exceeding the governance requirements applicable to them.

Mission: Our first focus is the mission of an organization. The mission is the reason your organization exists and is therefore the most important statement your organization makes. A mission statement seems simple but is actually quite complex as it serves multiple purposes.

Planning: A significant responsibility of the tripartite board is to set the direction for the organization. The planning required to do so involves, among other tasks, assessing needs, reviewing existing programs, forecasting future financial stability and growth, and making (sometimes tough, sometimes exciting) decisions about the future. Planning also requires constant assessing and revising.

Engagement: Being fully engaged in the organization means that board members not only meet their fiduciary duty of care to make well-informed, reasonable decisions but also help the organization with its efforts to connect with the community it serves.

Generating Funds: Ensuring the fiscal soundness of a nonprofit CAA is not only a key board responsibility, it is a critical one. The tripartite board is ultimately responsible for a CAA's survival and that survival is tied to having sufficient funds to operate and do so in compliance with the rules that govern the federal and state funds it receives.

Performance: We now live in a data-driven society. Being able to show that a program is producing results is often the key to sustaining and attracting funding. This area involves overseeing the performance of a CAA's programs, including the use of ROMA.

Accountability: The tripartite board plays an instrumental role in ensuring that a CAA is accountable, i.e., fiscally strong, legally complaint and operationally sound. Maintaining accountability requires the implementation of systems, policies and procedures that the board oversees, reviews and approves. To gain and maintain public trust, a CAA must be able to show that it has a strong commitment to ethical principles, transparency and accountability.

OFFICE OF COMMUNITY SERVICES
An Office of the Administration for Children & Families

CSBG IM #82 Tripartite Boards

Published: June 12, 2012

Audience: Community Services Block Grants (CSBG)
Category: Guidance, Policies, Procedures, Information Memorandums (IM)

Transmittal No. 82 **Date: March 23, 2005**

TO: State Community Services Block Grant Program Directors, Community Services Block Grant State Association Directors and Community Services Block Grant Eligible Entities

SUBJECT: Tripartite Boards

PURPOSE: This Information Memorandum addresses a number of policy questions that have arisen in recent years concerning the composition, role, and responsibilities of local community action agency tripartite boards. In addition, the Memorandum describes steps that may be taken by State CSBG lead agencies and State Community Action Associations to promote the continued viability and effectiveness of eligible entities through appropriately constituted and well-functioning tripartite boards.

This Information Memorandum is not intended to be definitive or binding on State or local agencies, but to serve as a guide on key issues.

BACKGROUND: Since 1968, local community action agencies have been required to have tripartite governing boards to gain and retain designation as eligible entities and to receive CSBG funding. Effective tripartite boards reflect and promote the unique anti-poverty leadership, action, and mobilization responsibilities assigned by law to community action agencies. Boards are responsible for assuring that agencies continue to assess and respond to the causes and conditions of poverty in their community, achieve anticipated family and community outcomes, and remain administratively and fiscally sound.

The nature of poverty and our nation's response to it continues to evolve. Many community action agencies are in the process of passing the baton to a new generation of leaders. This Information Memorandum restates and amplifies how tripartite boards help preserve community action focus, effectiveness, and accountability in these changing times.

Questions and Responses

The following questions and OCS responses convey important information about the roles and responsibilities of tripartite boards as required by statute and suggestions on how State CSBG authorities, State community action associations, and local agency officials can help assure that boards function effectively.

Question* 1 - *What does the law require?

Roles and Responsibilities o/Tripartite Boards

Sections 676B of the Community Services Block Grant Reauthorization Act of 1998 requires that, as a condition of designation, private nonprofit entities and public organizations administer their CSBG program through tripartite boards that "fully participate in the development, planning, implementation, and evaluation of the program to serve low-income communities."

Board Composition

•Low-Income Individuals and Families

For private nonprofit entities, a minimum of one-third of tripartite board membership must be democratically selected representatives of low-income individuals and families who reside in the geographic area being served by the agency.

For public organizations, such as city, county, or town governments, the law also requires that a minimum of one-third of tripartite board membership be comprised of representatives of low income individuals and families who reside in areas served. The statute allows public organizations to utilize State-specified mechanisms other than tripartite boards that "assure

decision-making and participation by low-income individuals in the development, planning, implementation, and evaluation of programs..."

OCS does not recommend including in this community representation category for either public or private agency boards individuals who provide services or supports to low-income residents but who are neither low-income or residents of the agency's service area. Such individuals may qualify for board membership as representatives of another board category -- "major groups or interests in the community."

•Elected Officials or Their Representatives

One-third must be elected officials, holding office at their time of selection, or their representatives. If a sufficient number of elected officials or their representatives are not available to serve, appointive public officials or their representatives may take the place of elected officials.

• Major Groups and Interests in the Community Served

The remaining board members must be chosen from "business, industry, labor, religious, law enforcement, education, or other major groups and interests in the community served."

Question 2 - Who appoints members to a tripartite board?

The law states that members of tripartite boards "shall be selected by the entity" in accord with the conditions described above. States must assure that local agencies comply with Federal statute and any applicable State statutes, and that the bylaws of tripartite boards reflect and advance statutory requirements.

Question 3 - Are term limits permissible?

The CSBG statute is silent on term limits. However, many CAAs find term limits helpful to keep boards revitalized and current. Community action agencies may impose such limits through their own bylaws if they wish.

To achieve the purposes intended by statute for each of the three components of agency boards, State and local agencies are encouraged to consider the following term limit considerations:

Representatives of Low-Income Individuals and Families

The statute requires that representatives of low-income individuals and families be "chosen in accordance with democratic selection procedures." The implicit intent of this requirement is to insure that those who *currently* live in areas served by the agency are represented so that they have a strong voice in agency governance and direction and are able to convey to those they represent the presence and significance of community action in their lives. And, because some programs within community action agencies, especially Head Start, also require governance involving families being served, overall agency coordination and communications across programs are further enhanced when a few (one or two) members of Head Start Policy Councils serve on agency tripartite boards. The Head Start regulations require that the Policy Council and the Board cannot have *identical membership*, so this must be observed.

Every effort should be made by eligible entities to assure that board members representing low-income individuals and families:

• Have been selected on the basis of some form of democratic procedure either directly through election, public forum, or, if not possible, through a similar democratic process such as election to a position of responsibility in another significant service or community organization such as a school PTA, a faith-based organization leadership group; or an advisory board/governing council to another low-income service provider;

• Are truly representative of *current* residents of the geographic area to be served,including racial and ethnic composition, as determined by periodic selection or reselection by the community. Being *current* should be based on the recent or annual demographics changes as documented in the needs/ community assessment. This does not preclude extended service of low-income community representatives on boards, but does suggest that continued board participation of longer term members be revalidated from and kept current through some form of democratic process and the assessment of community changes.Ultimately, it is the responsibility of the State to assure that agencies uphold both the letter and intent of the law governing appointment of low-income community representatives to tripartite boards. Particular attention should be paid to the two conditions described above.

Elected Public Officials or their Representatives

The overarching purposes for having elected officials serve on tripartite boards are to encourage awareness of poverty needs within the community and action by local governments, and to foster close coordination and partnership between public agencies and the eligible entities. State CSBG lead agencies, State community action associations, and local agency officials should ensure that the nature and number of public officials serving on each agency board supports and promotes these goals. The statute requires that elected public officials must be "holding office on the date of selection" to a tripartite board. The statute does not identify which public officials ought to serve on the tripartite board. The statute allows public officials (elected, or if necessary,

appointed) to name someone to represent them on the board. Again, while the statute does not set term limits for this category of board membership, the spirit of the law, that local governments participate in agency oversight and governance, suggests that:

• Elected officials serve on boards in this capacity only while they are in office.

Similarly, individuals designed by elected or appointed officials to represent them on boards
serve only while their principals are in office or are re-designated by those in office. Agencies are responsible for making sure that this category of board membership remains current through such procedures as prompt notification of newly elected or currently elected public officials of the opportunity for board service or representation, and timely replacement of board members (or their representatives) who no longer hold public office.

Local agencies that wish to extend the board service of either formerly elected officials or their representatives may chose to appoint them as representatives of "major groups and interests in the community."

Representatives of Major Groups and Interests in the Community

While the statute does not set term limits for these board members, their role is to reflect and involve key interests and resources within the community to guide agency actions and outcomes. For this category, agencies should strive to assure that:

• Groups and interests with current influence or resources deemed critical to the success of the agency are represented.

• Members are empowered by their organizations to participate in board activities and play a role in agency outcomes.

Question 4 - What does "fully participate in the development, planning, implementation, and evaluation of the program" mean?

Tripartite boards are responsible for oversight and governance of community action agencies:

Development

As the designated anti-poverty-agencies within their community, both public and private eligible entities are required to conduct periodic needs assessments of the causes and conditions of poverty within their service area and to decide what role, or mission, the agency will assume relative to other community organizations and resources, in addressing those needs.

Tripartite boards are key players in the developmental processes described above:

• Needs Assessment -- Board members, especially those that live in communities to be served and that represent low-income people, ought to be a primary source of information and insight concerning the conditions in their neighborhoods. Representatives of low-income families can help fashion agency outreach and communication strategies, on an ongoing basis, to assure that agency staff and programs are responsive to changing community needs and conditions. Board members that represent elected officials, and other community groups and interests, all bring critical information and perspective to the needs assessment process. Elected officials or their representatives can commission or make available government-sponsored studies of local economic, social, educational, and key conditions that affect poverty. Business, labor, religious, and other community group representatives offer similar information from the private sector and access to short-term and longer-range service and resource assessments and/or development plans that may impact the nature or extent of poverty in the community.

• Clarifying Agency Mission -- The way each community action agency perceives its role, or mission, is central to what they do and how they assess their effectiveness. Tripartite boards, if correctly constituted, provide an agency with a broadly-based, in-house, panel of "experts" on most aspects of community need, resources, and opportunities. Their expertise should help inform agency leadership and staff concerning the role(s) community action should and could play to reduce poverty vis-a.-vis other public and private programs and initiatives. Creating or reviewing mission statements can provide a focus for collaborative strategic planning among board members and agency leadership and staff, and a foundation for meaningful board oversight of agency operations and effectiveness.

Planning

Tripartite boards are important participants in agency annual and longer-range planning
activities. Specifically, individual members of the board, and the board as a whole, ought to
contribute to, and benefit from, various aspects of program planning:

• Long-range Strategic Planning- For those CSBG entities that are 501(c)(3) non-profit agencies, tripartite boards are ultimately responsible for the overall direction, conduct, and effectiveness of agency programs and activities. Public agency boards are "advisory" and are intended to guide public officials that manage their agencies, both elected and appointed, with information and advice on how to reduce poverty within the geographic area being served. As such, participation of boards is essential in strategic planning discussions of how the mission of the agency is to be accomplished through its programs and activities, and how the agency will determine what constitutes its "success." Tripartite boards should be encouraged to help the agency: a) identify broad goals and results it hopes to achieve through its work among low-income individuals and families, and within the community being served; b) mobilize and

array programs and activities, both within and outside the agency, to achieve those goals and results; and c) establish and maintain procedures for gathering and presenting information on goals and results for agency and board use.

• Annual Planning - Tripartite boards of both public and private entities should participate in the identification of what the agency hopes to accomplish each year and to help the agency establish specific performance expectations, in terms of both the nature and number of improvements to be achieved among low-income people and within the community, to guide agency programs and activities. Milestones, or intermediate steps toward achieving the ultimate results, ought to be identified by agency staff so that board members will be able to track progress throughout the year. In addition, boards are encouraged to identify possible ways to strengthen agency operations, including needed staff or facility enhancements, and to identify specific results it expects to be achieved. Boards may chose to utilize annual agency performance expectations, or anticipated program results, as important components of annual performance plans and compensation agreements they negotiate with the agency's executive director and other key staff.

Implementation

Because members of tripartite boards have "fiduciary" responsibility for the overall operation of private, non-profit community action agencies and statutorily described "advisory"
responsibilities in public agencies, members are expected to carry out their duties as any
"reasonably prudent person" would do. At a minimum, CAPLAW suggests that this would
require:

1. Regular attendance at board and committee meetings;
2. Thorough familiarity with core agency information, such as the agency's bylaws, articles of incorporation, sources of funding, agency goals and programs, Federal and State CSBG statutes;
3. Careful review of materials provided to board members;
4. Decision-making based on sufficient information;
5. Ensuring that proper fiscal systems and controls, as well as a legal compliance system, are in place; and
6. Knowledge of all major actions taken by the agency.

Two aspects of the requirements described by CAPLAW above warrant further discussion –board oversight of agency programs and board oversight of fiscal controls:

• Agency Program Implementation - Boards are encouraged to stay informed of agency programs and activities throughout the year, and to receive periodic reports from agency staff that focus on progress toward achieving milestones and ultimate results among clients and communities being served. Timely board awareness of program implementation progress allows for possible reassessment of performance expectations or program realignments should the need arise.

Board members are also encouraged to help the agency establish and maintain working relationships, or partnerships, with other public and private agencies and programs in the community that can help achieve community action results. For example:

1. Members that are either elected officials or that represent elected officials may
identify public resources and programs that could contribute to client or
community outcomes and facilitate communication and coordination between the community action agency and the public program;
2. Members that represent critical community interests, such as commercial or
financial institutions, may help identify possible sources of support for the
agency's low-income clients, including employment opportunities, asset
formation assistance, or access to other financial services;
3. All members of the tripartite board may be enlisted in an agency's advocacy
efforts to increase or preserve needed services and programs in the community
that support greater self-sufficiency among low-income families.

• Fiscal Controls - Because tripartite boards of private, non-profit agencies are ultimately

responsible for assuring that agency funds are spent and accounted for in accord with all
applicable Federal, State, and local statutes and regulations, boards must make sure that fiscal controls and procedures are put in place and maintained by the agency that provide for:

1. Trained and qualified staff to manage fiscal accounts and records of the agency on a day-to-day basis;
2. Commonly accepted financial procedures for transactions, recordkeeping, and
reporting such as those required by the CSBG Act, Part 74 of the Code of Federal
Regulations, and OMB Circular 133;
3. Frequent reports to the board by agency fiscal staff on overall agency fiscal status,
procedures, practices, and transactions;
4. Required board review and prior approval of all "substantial" agency fiscal

transactions or commitments, as defined by statute or agency bylaws; and
5. Audits and audit reports to the board by a CPA firm independent of board member or agency staff association.

Evaluation

As indicated, tripartite boards of both public and private agencies are encouraged to focus their attention on results in all phases of agency program activity, including program development, planning, implementation, and especially evaluation. Boards should request, and be provided with, information concerning actual changes or improvements that have occurred among clients and community as a result of agency assistance. To determine the relative "success" of the agency, its staff and programs, boards may compare the nature and level of these outcomes with performance expectations, or targets, which were developed during the agency's planning cycle.
Outcome or performance-focused information from one year can inform and strengthen program planning by the agency and its board in subsequent years.

Question 5 - What kind of training should board members receive?

Board members need to be trained to carry out both the legal, or fiduciary, aspects of their service and their leadership responsibilities to help guide the agency toward "success."

At a minimum, it is recommended that board training cover the following topics:

• Fiduciary Responsibilities

1. Orientation to statutory and regulatory requirements (CSBG Act, other Federal, State or local statutes and regulations, including non-profit board requirements;
2. Agency articles of incorporation, bylaws, etc.
3. Overview of Board functioning - appointment, representation, meetings, committees, conflict of interest policy, relationship to executive director and staff, etc.
4. Role and Responsibilities of the Executive Director
5. Role and Responsibilities of the Board regarding the employment, retention, and compensation of the Executive Director and key agency staff
6. Overview of agency administration and financial management policies and procedures - oversight role and responsibilities of the board
7. Orientation to, and how to oversee, agency mission, long-range and annual plans
8. Orientation to, and how to oversee, agency programs and services
9. Orientation to, and how to oversee, agency evaluation and reporting policies and procedures - role of the board in program and personnel performance evaluation.

• Agency Leadership - Board Roles and Responsibilities

Results Oriented Management

1. Agency Development -
o Needs Assessment-
o Agency Mission determination -
2. Agency Planning
o Strategic Long-Range Planning
o Annual Planning - performance expectations and targets
o Forming Partnerships with other resources in the community
3. Program Implementation -
o Tracking of Milestones, interim performance results and reports
o Making mid-course corrections to improve performance

Results Oriented Accountability

4. Evaluation - (Results Oriented Accountability)
o Result-Focused Evaluation - clients and community
o Results-Focused Evaluation - agency and staff
o Using Information for Planning
o Using Information for Additional Funding and Advocacy

Note: In rural areas or where transportation is challenging, teleconference calls and other technological devices have assisted board communication.

Question 6 - What constitutes "conflicts of loyalty or interest" among board members and how best should they be avoided.

Individuals serve on tripartite boards first and foremost to advance the interests of the agency, its clients, and the community. They do not serve to advance their own interests and have a "duty of loyalty'.' to the agency. But, the very nature of the tripartite board, which calls for the representation of, and expected outreach to, various sectors of the community, creates possible situations in which distinctions of "loyalty" or "interest" need to be kept very clear and unambiguous.

To safeguard against situations in which the loyalty, interest, or intent, of board member action may be questionable, the following minimum conflict of interest practices are recommended:

• Have a clear, written policy

Each agency should have a clear, written policy concerning conflicts of loyalty or interest among board members and agency staff that describes in detail:

1. Full disclosure of financial interest requirements for all board members and staff;
2. Conditions and procedural requirements for board member and/or staff withdrawal from any action for which a real or potential conflict of interest might exist;
3. "Transparency" and full record keeping of all board or agency financial decisions or actions and the parties involved in the decisions or actions;
4. Policies and procedures for selective (i.e. meet a certain threshold of expenditure or financial commitment) "independent" prior review of actions or decisions that may pose potential conflict of interest issues.

• Avoid situations that advantage board member interests or the appearance of advantage

As indicated, the very nature of tripartite representation on boards creates potential conflict of loyalty or interest situations in which board members help the agency establish linkages with public and private community resources and services. Often, this outreach may result in financial arrangements or contracts involving expenditure of agency funds. In addition, board members have "inside" knowledge of agency activities and operations, including current and future employment opportunities within the agency. To avoid situations in which a conflict of interest or loyalty would occur, or the appearance of such a conflict, the following is recommended:

1. Competitive bidding procedures should be used for large financial transaction situations in which a board member or agency staff member has an interest in, or relationship to, one or more providers of the needed goods or services. If such a potential is unclear, the agency and its board should refer the issue to a pre-identified "independent" conflict of interest consultant or group for a determination. For smaller transactions that may involve board or staff member interests, a process involving collection of comparable quotes, prices, or salaries may suffice.

2. If, after a competitive process, a provider with ties to a board member(s) or staff is selected to enter into a financial arrangement with the agency, the affected board member(s) and staff must disassociate themselves from participating in any decisions regarding the conduct of the financial relationship. Neither board member(s) nor staff may benefit personally, in any way, from the financial relationship between the agency and the provider with which they have a connection.

3. Board membership should not be used as a "stepping stone" to agency employment.
Board members should not seek or receive employment from the agency in any part- time or full time capacity during their service on the board. Board members wishing to be considered for employment ought to resign their position and wait a reasonable period of time before applying for a paid position within the agency. This waiting period is recommended to avoid both the actuality and appearance of undue advantage board membership affords in the hiring of agency management and staff.

4. Board members and their families should not enjoy any financial gain from their position, including receipt of salary, goods or special services for their board participation. Board members may be reimbursed for expenses associated with board service, such as incidental costs of supplies, or mileage, per diem, and lodging expenses incurred while attending out of town conferences or training approved by the entire board.

5. Agencies and boards should err on the side of caution in all matters that might create or appear to be a conflict of interest. They should use the proverbial "smell test" in all
potentially questionable conflict of interest situations and call upon independent, outside counsel, both legal and ethical, to screen plans before action.

It should be noted that board members, especially those that represent low-income individuals or families, are not excluded from being clients of the agency and receiving program services for which they are eligible. These board members should not receive preferential treatment in the nature or timing of such services.

Question 7- What is the best relationship between a tripartite board and the agency executive director?

The best relationship between a tripartite board and the agency executive director is one that advances the work of the agency in achieving results, or improvements, in the lives of low-income people and the community in which they live.

That said, there are organizational and functional issues that have prompted this question from a number of locations around the country over the past few years. While situations vary from agency to agency, and community to community, the following general principles are offered to promote strong, focused, and effective working relationships between tripartite boards and agency executive directors:

• Boards Establish Policy, Executive Directors Execute Policy

Tripartite boards are responsible for establishing and approving policies that govern all aspects of agency operations, including agency and board bylaws, administrative and fiscal control policies, and personnel policies. Executive directors are responsible to assuring that the board established policies are carried out by the agency, and for providing information to the board on the execution of its policies as requested by the board. In many agencies, boards work with the executive director and agency staff collaboratively to develop agency policies and procedures, but the ultimate responsibility for promulgating such policies remains with the board.

• Boards Set Agency Mission, Executive Directors Accomplish Agency Mission

Boards are responsible for determining the overall mission, or direction, of the agency taking into account the needs of the community and the relative anti-poverty role played by the agency vis-à-vis other programs and resources in the community. Executive directors are responsible for providing the necessary information and assistance to the board that will help them determine the overall mission or direction of the agency, and for organizing the agency's programs and services in such a way that will best accomplish the mission. Again, in many communities, boards and executive directors (and agency staff) work collaboratively to both set the agency's mission and organize programs and services toward that end.

• Boards Set Performance Targets, Executive Directors Guide Work to Achieve Targets

Ideally, tripartite boards will officially approve annual performance targets, or outcomes they expect the agency to achieve among low-income families and the community. In most cases, these performance targets will be in the form of recommendations from the agency's executive director developed ideally in concert with the board, agency staff, and key community partners. How the agency organizes and operates services and programs to achieve these board-approved performance targets is the responsibility of the executive director and the staff of the agency. Boards, therefore, should not routinely be involved in the day-to-day manner in which services are provided, but should pay particular attention to following the consequences, or results of agency programs as they unfold and are reported throughout the year.

• Boards and Executive Directors Evaluate Agency Performance, Both are Accountable

Based on reports of results generated by the agency, boards are ultimately responsible for deciding whether or not the agency and the executive director have been "successful" in accomplishing the mission of the agency. Boards are encouraged to focus on client and community results as a major factor in evaluating the work of the agency, its executive director, and staff. Indeed, such results may point to institutional needs, such as staff enhancement and training or program revisions, which may improve performance in subsequent years.

• Boards Supervise Directly Only One Employee - the Executive Director

One of the most important concepts conveyed by agencies that have well-functioning relationships between their tripartite board and executive director is, "Boards supervise directly only one employee - the Executive Director."

This concept embodies the notion that board and agency staff functions are indeed separate, but they are joined through the relationship between the board and the one person they must hold accountable for the work of everyone else -- the executive director. This clearly means the boards must hold the executive director responsible for the activities of the agency. The board should appraise the executive director's performance on an ongoing basis, but at a minimum, the board should have a complete appraisal annually. Adopting this concept of "one employee" enables boards to refrain from bypassing their agency's executive director to provide day-to-day instructions to agency staff (what many call "micromanaging"). But, it must be clear that the concept should not protect an executive director from gaining too much authority over all aspects of agency policy and operations by assuming roles and functions that clearly reside with the tripartite board.

The concept is not intended to diminish or distort the fiduciary responsibility of tripartite boards of private, non-profit agencies to oversee the overall functioning of their agency and the cumulative work of agency staff.

When a tripartite board is faced with the responsibility of recruiting and hiring a new executive director for their agency, members may set whatever criteria they deem appropriate. Boards are encouraged to seek out and employ a leader capable of:

1. Working cooperatively with the board to assure there is on-going consensus concerning the agency's antipoverty purpose, or mission, among board members, agency staff, and the broader community;
2. Mobilizing and coordinating programs and services both within and outside the

agency toward accomplishing this mission;
3. Serving as a key community leader and advocate for the preservation and expansion of opportunities to assist low-income individuals and neighborhoods move out of poverty;
4. Achieving strong administration and fiscal control over agency resources; and
5. Employing performance-based management concepts embodied in Results Oriented Management and Accountability (ROMA) as the framework for relating to the board, and for all aspects of agency operations including program planning, resource allocation, service provision, program and staff evaluations.

Question 8 - How can State CSBG agencies and State Community Action Associations advance the effectiveness of tripartite boards?

At a minimum, OCS recommends that State CSBG agencies and State community action associations work together to assure that:

• **All board members receive timely and continuous training.**

OCS has funded the development of a number of board training curricula that are now available upon request and that contain many of the elements of effective training described in this Information Memorandum. For information on these training materials, please contact:

Barbara Mooney
Training Director
Community Action Association
of Pennsylvania
222 Pine Street
Harrisburg, PA 17101
Phone: (724) 852-2272
E-Mail: **barbaramooney@allte1.net**

Owen Heiserman
Mid-Iowa Community Action Agency
1001 S. 18th Street
Marshalltown, Iowa 50158
Phone: (641) 752-7162
E-Mail: **owen@micaonline.org**

Elliot Pagliaccio
Vice President
The Rensselaerville Institute
690 Saratoga Road, PMB 130
Burnt Hills, NY 12027-9402
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E-Mail: **epagliaccio@Rinstitute.org**

Connie Greer
Director, Office of Economic
Opportunity
Minnesota Depart. of Human Services
444 Lafayette
St. Paul, Minnesota 55144
Phone: (651) 284-4470
E-Mail: **connie.greer@state.mn.us**

• Board representatives participate actively in statewide community action training and technical assistance meetings and conferences.

Board chairs or other members ought to be encouraged to participate in statewide community action meetings and conferences sponsored by both the State CSBG authority and the State CAA association. Such meetings will not only provide an opportunity for board members to contribute to discussions and training, but will also provide a means of conveying to all board members the status of community action in the State, information about the programs, services, and accomplishments of other agencies, and how their boards can continue to help improve the focus and outcomes in their own agencies.

• State CSBG monitoring or CAA association assessments focus on board functioning (both fiduciary and leadership responsibilities)

State CSBG officials should meet routinely with boards as part of their overall monitoring of local agencies to determine the extent to which the boards are aware of, and are carrying out, their responsibilities. Assessment should be made of agency compliance with statutory requirements for board composition and functioning. Similar assessments are encouraged in those States in which CAA associations have developed and are using agency self-assessment procedures in conjunction with State CSBG monitoring. State CSBG authorities and State community action associations are encouraged to provide technical assistance to agencies to help them achieve or maintain compliance with the law.

Please don't hesitate to contact me if you have questions concerning this Information Memorandum.

_____/s/_____ __
Margaret J. Washnitzer, DSW
Director of State Assistance
Office of Community Services

LIFT
Community Action Agency, Inc.

Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman

RESOLUTION

WHEREAS, it has come to the attention of the Board of Directors of LIFT Community Action Agency, Inc. that it becomes necessary from time to time for the Executive Director to take action on various matters, and

WHEREAS, the Executive Director of the agency is available and willing to perform as the contracting official for the agency, and

WHEREAS, the officers of the agency are not always readily available when a timely action or response is required.

WHEREAS, the Board of Directors have previously authorized the Executive Director to contract for and execute such legal matters and documents on behalf of the agency as may be required.

WHEREAS, it has come to the attention of the Board of Directors that the Executive Director is required to sign some legal documents as "President" of the agency.

NOW, THEREFORE, BE IT RESOLVED that the Executive Director of LIFT Community Action Agency, Inc. is authorized to contract for and execute such legal matters on behalf of the agency as may be required and that said Executive Director may execute such documents on behalf of the agency as "Executive Director" or as "President", whichever may be required.

BE IT FURTHER RESOLVED, that this resolution shall remain in effect until rescinded by the Board of Directors.

Adopted and approved on this 9th day of January, 2024, in a regular meeting of the Board of Directors of LIFT Community Action Agency, Inc.

_____

David Hawkins, Chairman
Board of Directors
LIFT Community Action Agency, Inc.

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DECK

BOARD SELF-ASSESSMENT

LIFT Community Action Agency
Highlights & Overview

BoardSource®

In this DECK



1. Understanding the Data
2. Performance at a Glance
3. Question Breakdown
   - Highest- and lowest-scoring questions
   - “Don’t know” responses
4. Benchmarking Data
5. Checklist of Board Practices
6. Board Composition: Diversity, Equity, and Inclusion
7. Board Effectiveness
8. Board Commitment and Experience

Understanding the Data

This report provides an overview of how well the board thinks it is meeting its ten areas of governance responsibility as organized into the following four broad categories:

The People



Board Composition

Board Structure

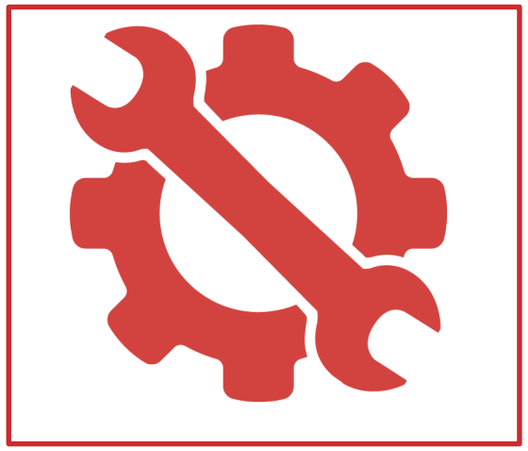
Board Meetings

The Culture



Culture

The Work



Mission, Vision, & Strategic Direction

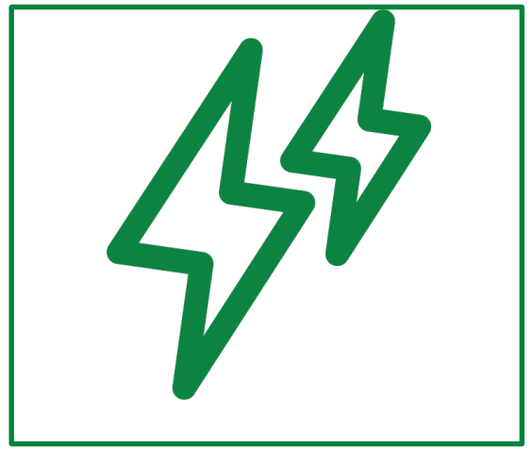
Program Oversight

Financial Oversight

Chief Partnership & Executive Oversight

Funding & Public Image

The Impact

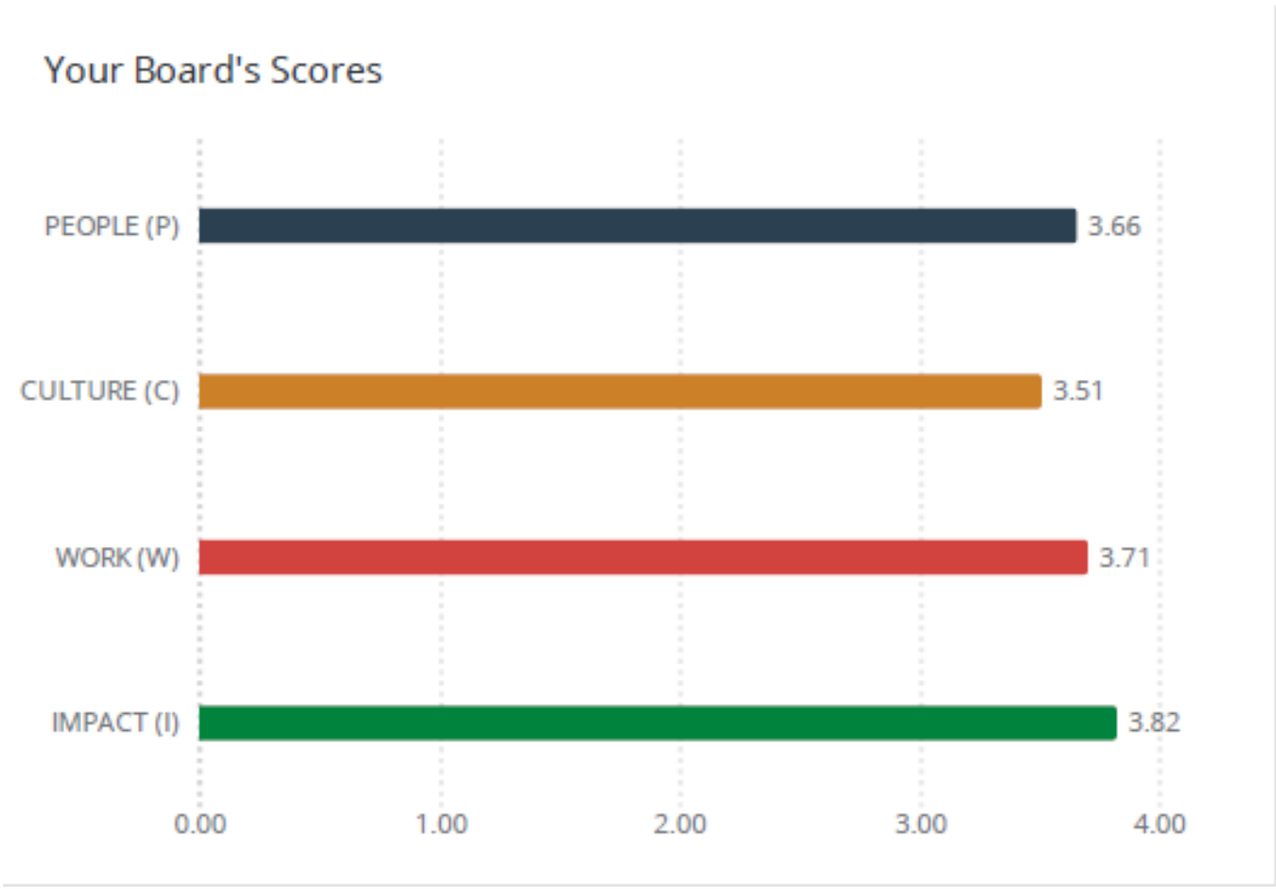


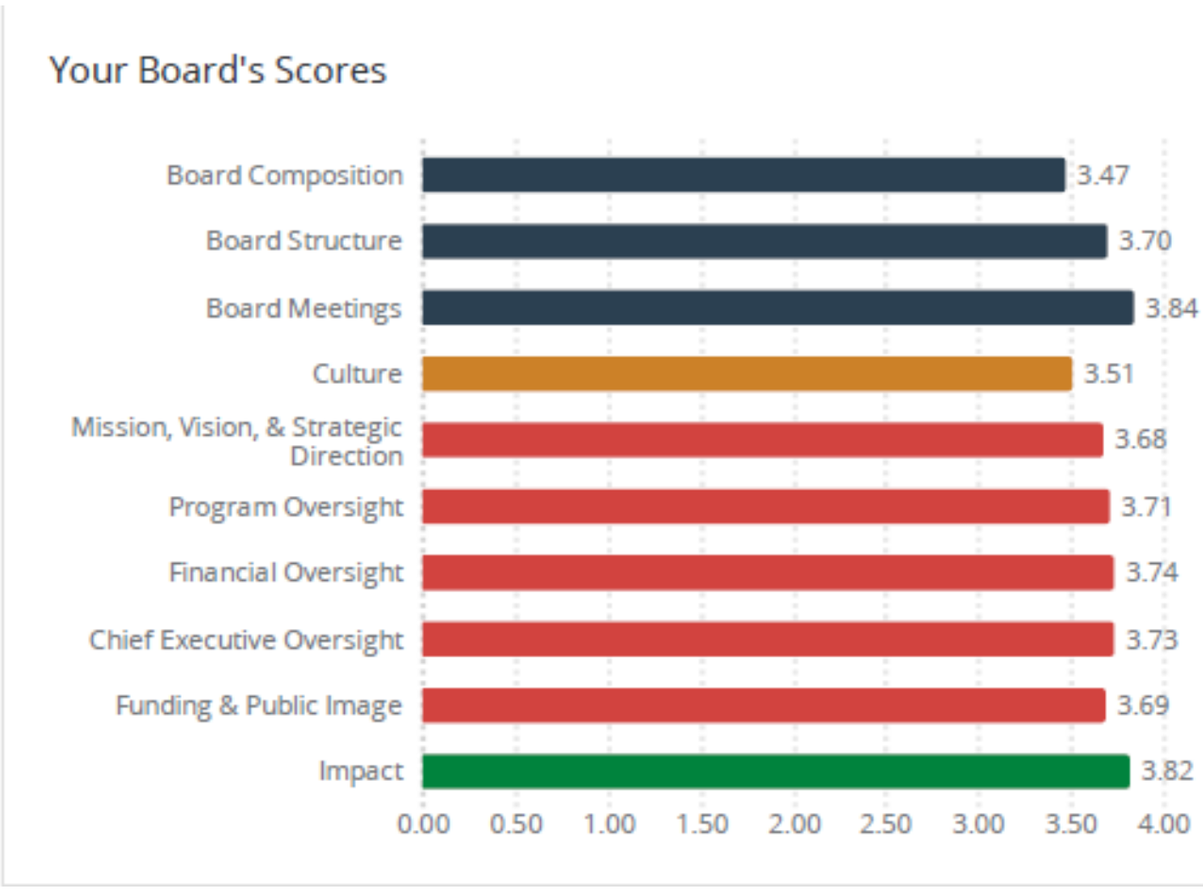
Impact

BoardSource

Understanding the Data

The scores for individual questions are averaged within each area of responsibility (as shown at right), and the scores for each responsibility are then averaged within each of the four overarching categories (as shown at left).





Scores are based on the following answer scale:
0=Poor; 1=Fair; 2=OK; 3=Good; 4=Excellent

BoardSource

Performance at a Glance

Your Participation: 19/26 completed surveys 73% participation

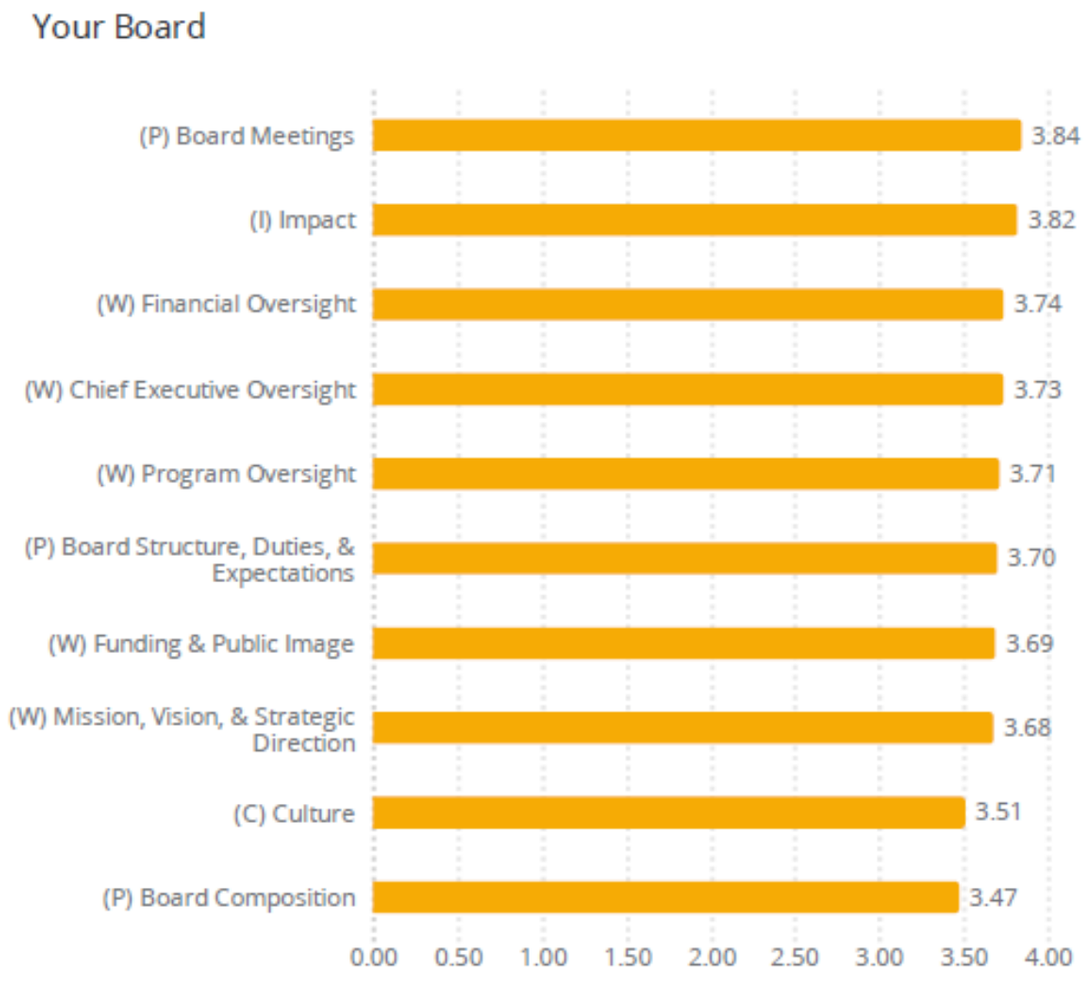
Role		Responsibility	Your Averaged Score	
	**P. The PEOPLE**	Board Composition	3.47	**3.66**
		Board Structure	3.70	
		Board Meetings	3.84	
	**C. The CULTURE**	Culture	3.51	**3.51**
	**W. The WORK**	Mission, Vision, & Strategic Direction	3.68	**3.71**
		Program Oversight	3.71	
		Financial Oversight	3.74	
		Chief Executive Partnership & Oversight	3.73	
		Funding & Public Image	3.69	
	**I. The IMPACT**	Impact	3.82	**3.82**

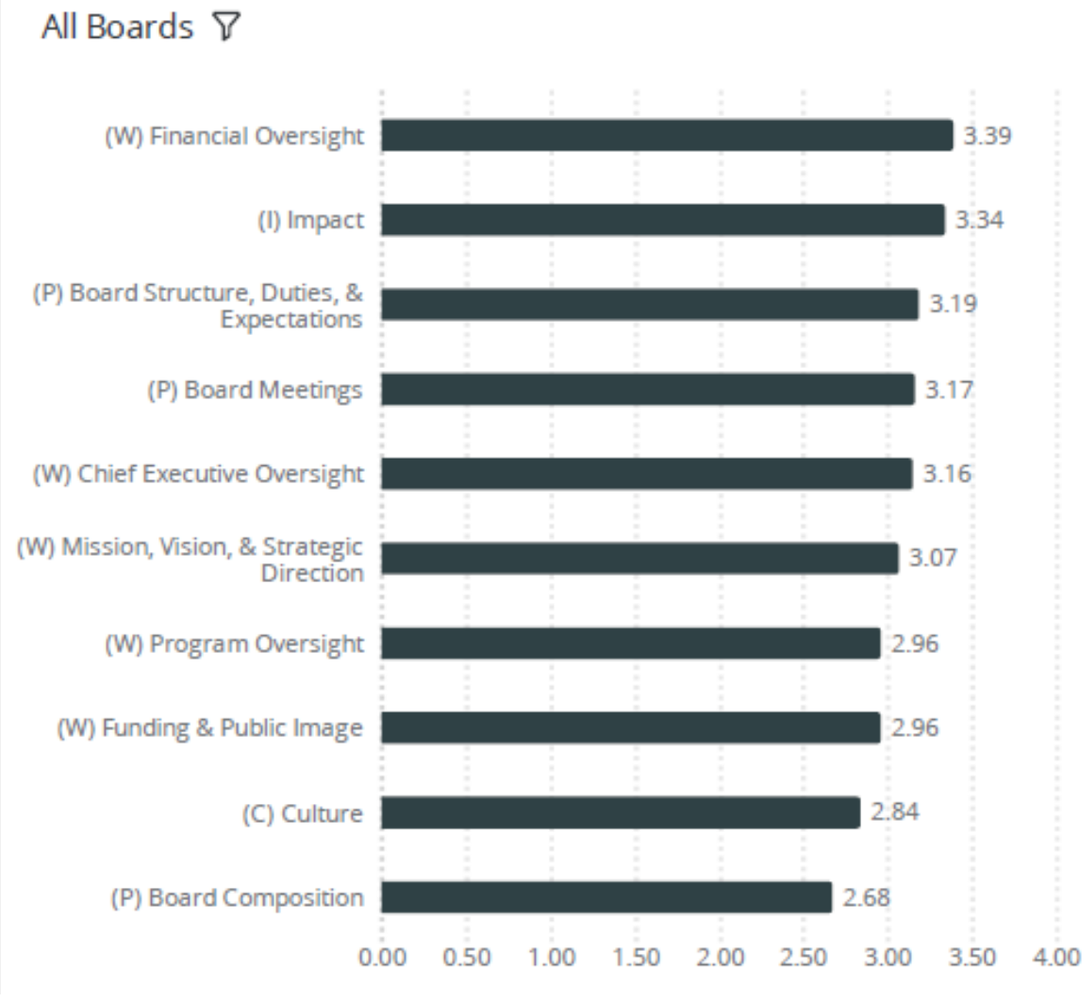
Please refer to Data Report, Overview of Results Section

BoardSource®

Performance: High to Low

The graph at left below shows how your board has assessed its performance – from highest to lowest – in the ten areas of responsibility. Bars at the top indicate strong performance. Bars in the middle highlight areas in which the board is performing at an acceptable level but may want to monitor. Bars at the bottom indicate responsibilities that need attention.





Please refer to Data Report, Overview of Results Section

BoardSource

Your Highest-Scoring Questions

	Survey Question	Average Score	Don't Know Count
P.18	Using effective meeting practices, such as setting clear agendas, having good facilitation, and managing time well.	4.00	0
I.4	Your organization's overall performance.	3.95	0
P.12	Periodically reviewing and updating the bylaws, board policies, and board procedures.	3.95	0
P.13	Following and enforcing the board's conflict-of-interest policy.	3.89	0
P.21	Taking action when needed.	3.89	0
I.2	Your organization's reputation within networks of importance to your mission. Please focus specifically on the extent to which the board enhances the organization's reputation (by communicating the organization's values and priorities), rather than filtering it through the lens of fundraising or anything else.	3.89	1
W.17	Regularly reviewing financial reports.	3.89	1
W.24	Cultivating a climate of mutual trust and respect between the board and chief executive.	3.89	1
I.3	The financial resourcing of your organization's work, both in terms of the strength of the business model and the securing of revenues.	3.88	2
W.21	Reviewing and ensuring the organization carries adequate insurance.	3.83	1

Your Lowest-Scoring Questions

	Survey Question	Average Score	Don't Know Count
C.10	Proactively addressing challenging board behavior.	3.21	5
P.3	Using quantitative data on constituent demographics to define what the ideal board composition looks like, including projections on anticipated changes.	3.29	2
C.9	Working proactively to discuss and address any dynamics within the board or between board members that may be negatively impacting the board's ability to share power equally.	3.31	3
C.5	Providing opportunities for board and staff to get to know each other.	3.39	1
W.42	Holding board members accountable for fulfilling their fundraising responsibilities.	3.40	4
P.2	Cultivating a pipeline of diverse board candidates.	3.41	2
P.10	Defining responsibilities and setting expectations for board member performance.	3.42	0
W.30	Soliciting feedback about the chief executive's performance from direct reports.	3.44	1
P.7	Planning for board officer succession.	3.47	4
P.8	Utilizing the skills and talents of individual board members.	3.47	2

“Don’t Know” Responses

If the number of "Don’t Know” answers seems high, it’s time to ask why. If some of the individuals who participated in the survey are new to the board, it makes sense that they can’t answer some questions, and there’s no need to worry. If experienced board members answered in this way, take a closer look to determine how this situation can be improved.

	Survey Question	Average Score	Don’t Know Count
W.23	Receiving and reviewing the Form 990 or 990 EZ, if applicable.	3.58	7
C.10	Proactively addressing challenging board behavior.	3.21	5
W.42	Holding board members accountable for fulfilling their fundraising responsibilities.	3.40	4
P.7	Planning for board officer succession.	3.47	4
C.9	Working proactively to discuss and address any dynamics within the board or between board members that may be negatively impacting the board's ability to share power equally.	3.31	3
P.4	Aligning board recruitment processes and activities with stated goals for board composition.	3.50	3
W.41	Introducing the organization to potential donors.	3.56	3
W.14	Identifying standards against which to measure organizational performance, e.g., industry benchmarks, competitors, or peers.	3.63	3

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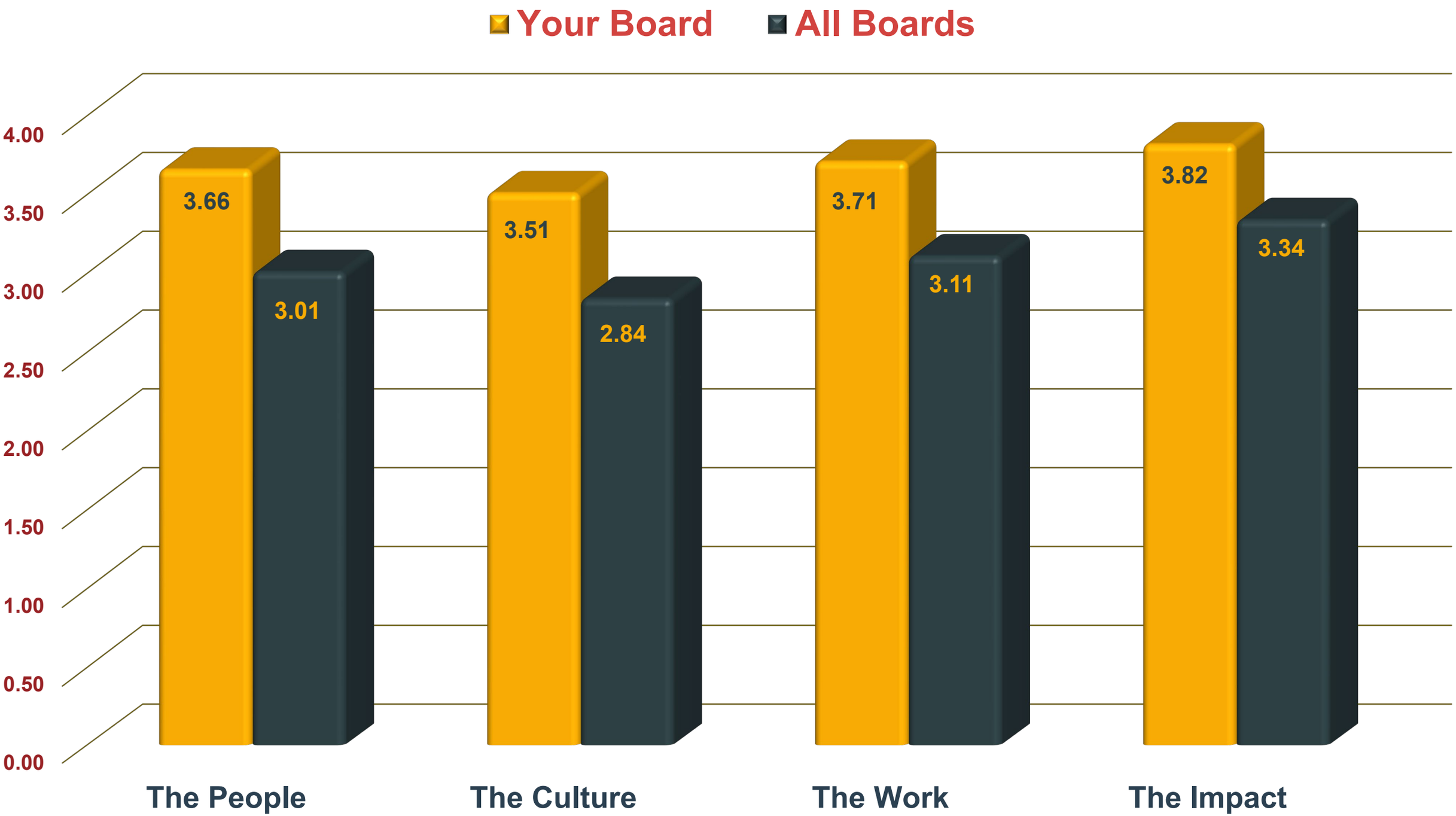
Benchmarking

By comparing your performance as a governing body against that of your peers, you will be able to identify how your performance differs, for better or for worse. Please use the benchmarked data on the following slides as one point of reference within the context and history of your organization to help you focus on your strengths and consider potential areas for growth. Benchmark scores reflect trends among those who have taken the survey. They do not necessarily reflect best or recommended practice and are not meant to be instructive or serve as universal goals.

Considerations while reviewing your benchmarking data:

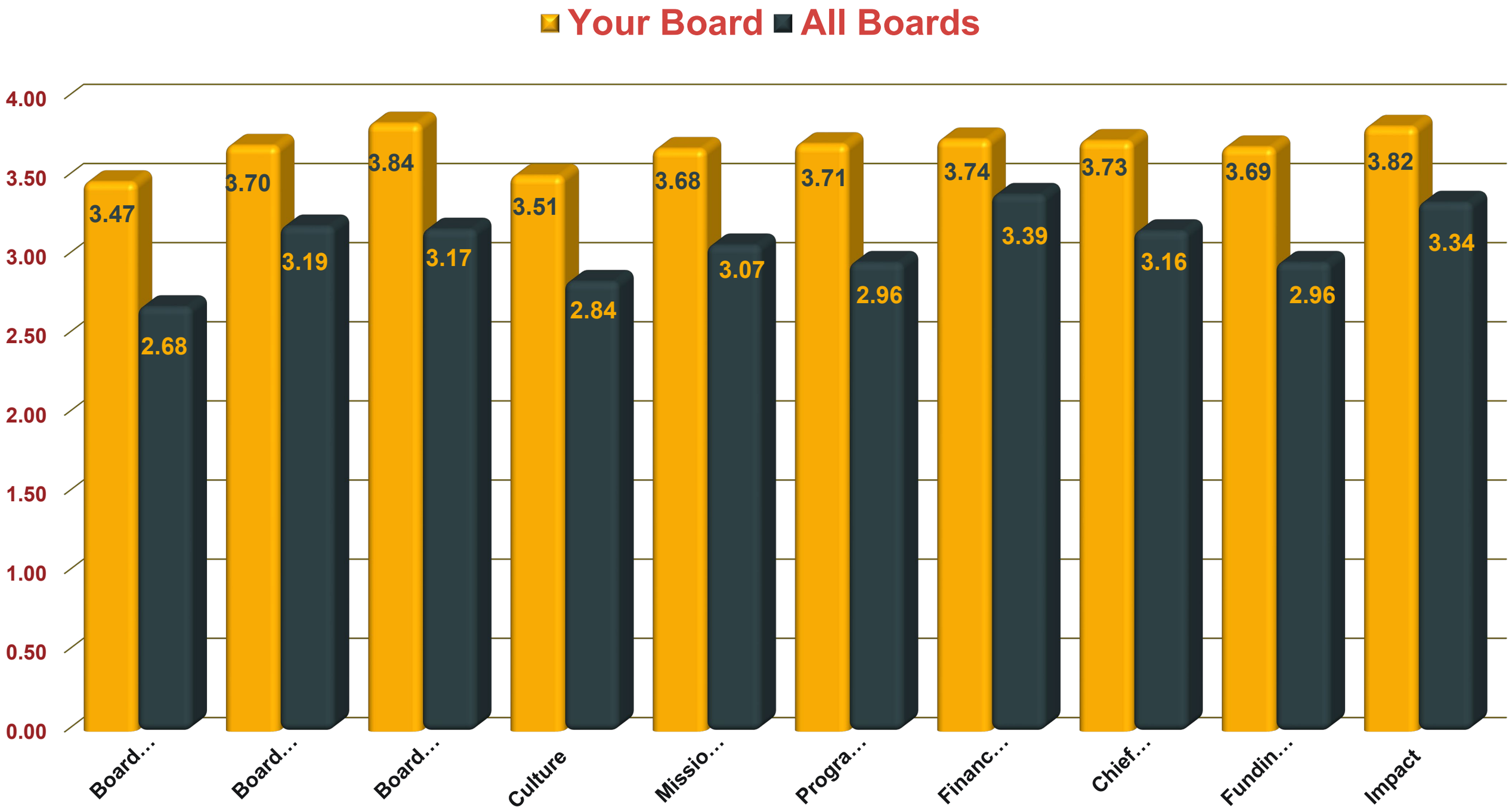
1. Your BSA data is benchmarked against other nonprofit organizations that have answered the same BSA survey questions. There is no additional breakdown of the data beyond those who have complete those who have completed the same version of the BSA (i.e. we do not breakdown the data based on mission, org size, etc.).
2. Benchmarking data automatically updates in real time and, as such, is always changing. Your benchmarking data was pulled on or near the close date of your survey project.
3. Collection of benchmarking data began in 2013 with additional questions being added in 2018. Therefore, the audience size and makeup you are benchmarked against in this report may vary question by question.
4. BoardSource endeavors to benchmark each question by the largest possible audience for maximum data integrity.

Benchmarking Performance



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Benchmarking Performance



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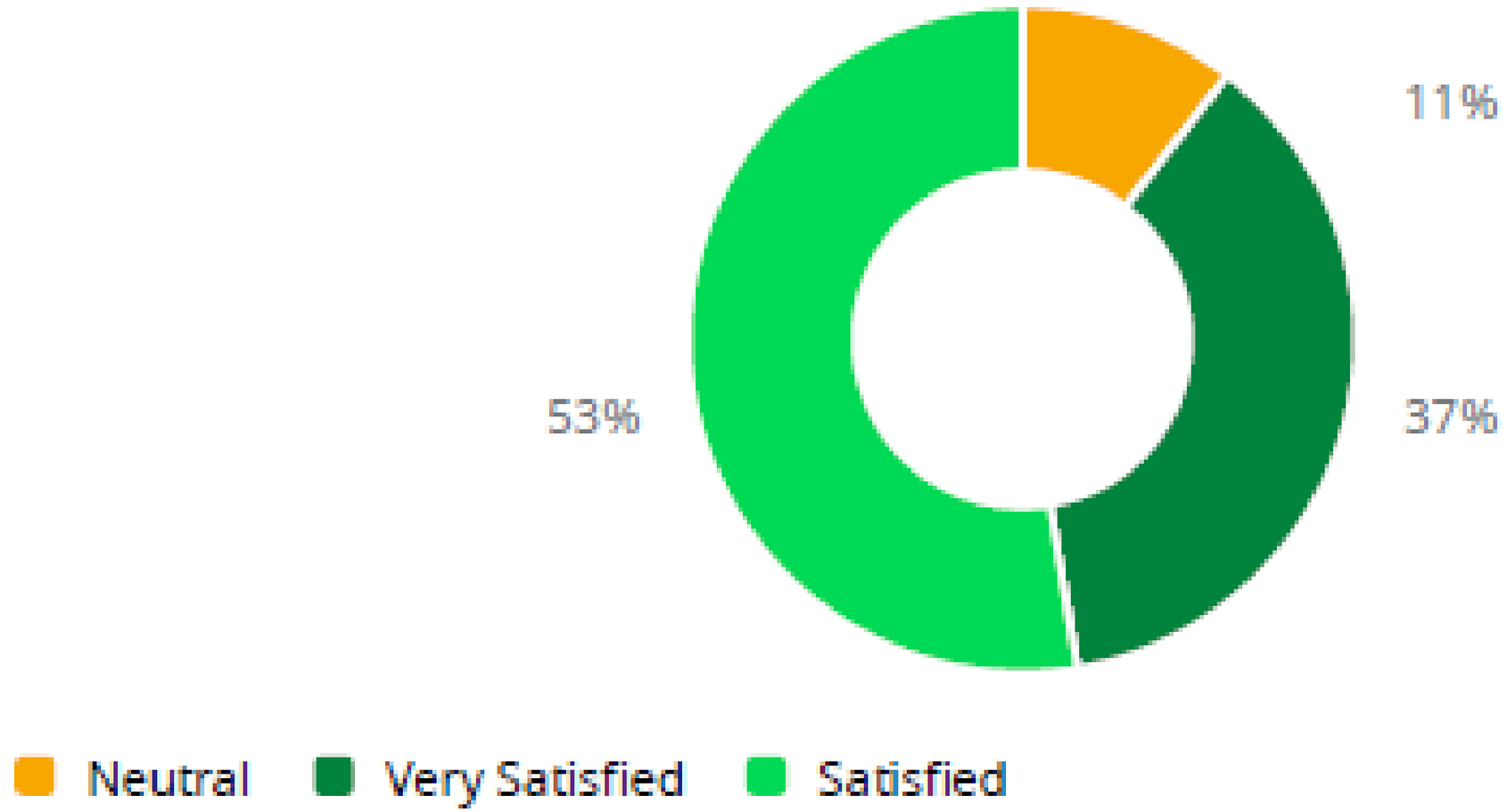
Benchmarking Performance

Role & Responsibility	Your Score	Benchmark Score	Comparison
P. The PEOPLE	**3.66**	**3.01**	**0.65**
Board Composition	3.47	2.68	0.79
Board Structure	3.70	3.19	0.51
Board Meetings	3.84	3.17	0.67
C. The CULTURE	**3.51**	**2.84**	**0.67**
W. The WORK	**3.71**	**3.11**	**0.60**
Mission, Vision, & Strategic Direction	3.68	3.07	0.61
Program Oversight	3.71	2.96	0.75
Financial Oversight	3.74	3.39	0.35
Chief Executive Partnership & Oversight	3.73	3.16	0.57
Funding & Public Image	3.69	2.96	0.73
I. The IMPACT	**3.82**	**3.34**	**0.48**

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Satisfaction with Board Effectiveness

How satisfied are you with the overall effectiveness of the board?

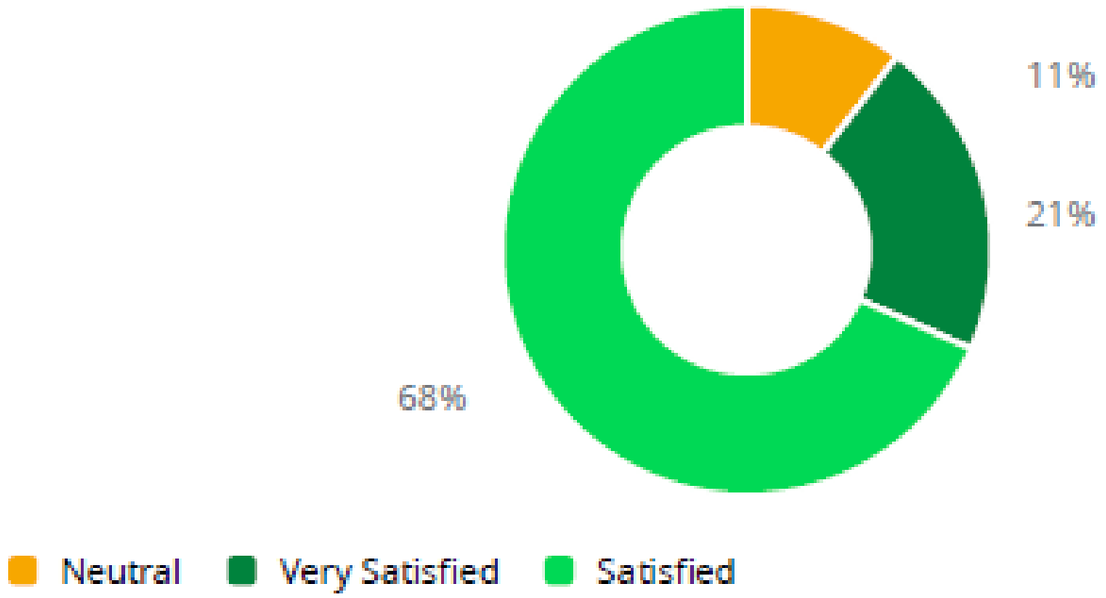


Please refer to Data Report, Overview of Results Section

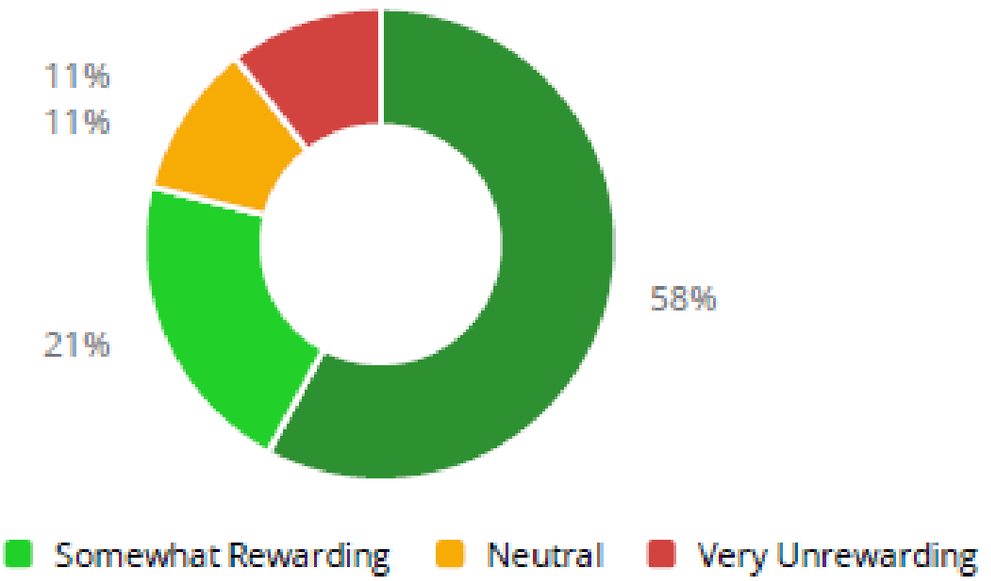
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Satisfaction with Commitment and Overall Experience

Are you satisfied with the level of commitment and involvement demonstrated by most board members?



Do you find serving on this board to be a rewarding and satisfying experience?



Please refer to Data Report, Overview of Results Section

BoardSource

Board Composition: Diversity, Inclusion, and Equity

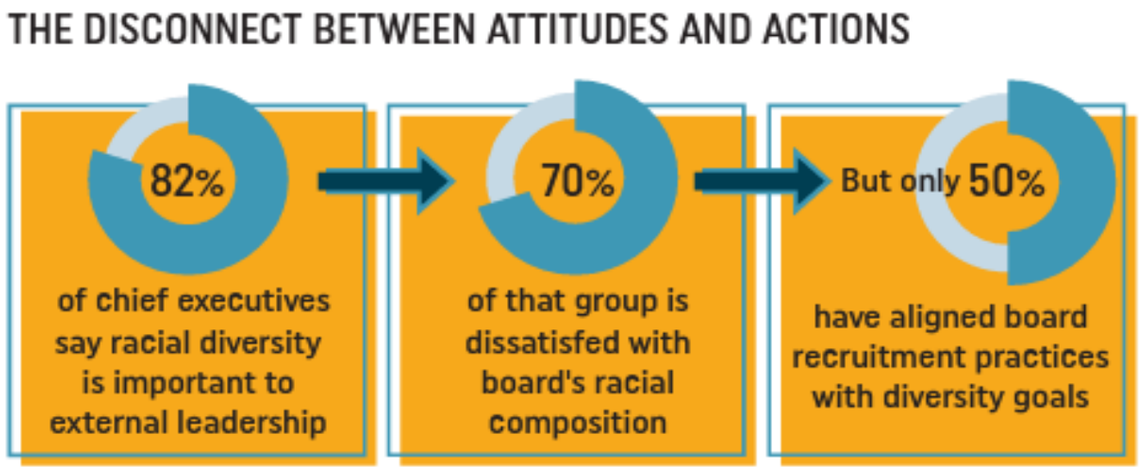
Though not covered in the BSA itself, the next several slides show sector data on the composition of nonprofit boards from BoardSource's 2021 Leading with Intent survey. We believe that to function at the highest level, a board should ensure that its composition incorporates diverse points of view. As evidenced in Purpose-Driven Board Leadership boards represent and govern our organizations on behalf of communities. Who is on the board can drastically change how the board operates and what role it plays. The stakes are high when a board is ill-equipped to understand the impact of its decisions on the diverse communities it seeks to serve.

Our intent with sharing this data is to offer a starting place for your board to begin conversations about what diversity, inclusion, and equity mean for your organization.

Diversity: What's Typical?

Please note: The data on this and the next slide show demographics based on a national convenience sample, which limits how much it can be generalized to the broader public charity community. Having said that, the data provides insight into the relative strengths and challenges of these organizations that may be applicable to the community more broadly. The Leading with Intent report itself was published in 2021, but the survey was conducted in 2019, prior to the COVID-19 pandemic.

Data provided is descriptive rather than instructive and is intended only to serve as a starting point for board discussion.



Disability Status	Chief Executive	Board Chair	Board members
Without disability	95%	97%	95%
With disability	5%	3%	5%

Gender	Chief Executive	Board Chair	Board Members
Female	74%	53%	53%
Male	26%	47%	47%
Non-Binary	<1%	<1%	<1%

	Chief Executive	Board Chair	Board Members
Not Transgender (Cisgender)	99.3%	99.6%	99%
Transgender	1%	<1%	1%

Source: Leading With Intent 2021

BoardSource

Board Diversity/Composition Trends

Race & Ethnicity	Chief Executive	Board Chair	Board Members
White/Caucasian/European	87%	83%	78%
Black/African American/African	5%	6%	10%
Hispanic/Latino/Latina/Latinx	3%	5%	5%
Asian/Asian American/Pacific Islander	2%	2%	4%
Multi-Racial/Multi-Ethnic (2 or more races or ethnicities)	3%	2%	1%
Native America/American Indian/Indigenous	<1%	<1%	1%
Other race/ethnicity	1%	1%	2%

Age	Chief Executive	Board Chair	Board Members
Under 35	4%	4%	9%
35 to 44	16%	20%	21%
45 to 54	31%	25%	26%
55 to 64	38%	28%	26%
65 or older	11%	23%	17%

Sexual Orientation	Chief Executive	Board Chair	Board members
Heterosexual or Straight	90%	94%	94%
Gay, Lesbian, Bisexual	9%	6%	6%
Other	1%	0.1%	0.1%

Source: Leading With Intent 2021

BoardSource

Conversation Prompts

Now that you've review your results, let's recap by turning back to the following questions:



- What stands out?
- Are there gaps between expectations and actual performance?
- Is there anything in the report that is especially surprising, or that you'd like to understand better through conversations as a full board?
- Based on what you see in the self-assessment, what are the top one to three areas where you think the board should focus its development efforts?

Sample Action Plan

Topic	Outcome	Target Completion Date
Board Member Commitment	• Engaged board • Meeting attendance rates increased • Attendance policies enforced	March 20XX
Board Orientation	Development and implementation of a revised board orientation	June 20XX
Board Training	• 100% of board members will attend webinars/ in-person training. • Offer 4-6 opportunities annually	Sept 20XX

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Did You Know?

Did you know that as a NeighborWorks network member every board member and staff member can access the NeighborWorks Organizational Membership with BoardSource?

Membership benefits include:

- ✓ Conference, training, and publication discounts
- ✓ Free access to the BoardSource 101 and 201 webinars
- ✓ BoardSource member website access
- ✓ And much much more!

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NATIONAL COALITION AGAINST DOMESTIC VIOLENCE
NCADV

DOMESTIC VIOLENCE

What is domestic violence?

Domestic violence is the willful intimidation, physical assault, battery, sexual assault, and/or other abusive behavior as part of a systematic pattern of power and control perpetrated by one intimate partner against another. It includes physical violence, sexual violence, threats, economic, and emotional/psychological abuse. The frequency and severity of domestic violence varies dramatically.

Did you know?

- In the United States, more than 10 million adults experience domestic violence annually.[1]
- If each of these adults experienced only once incidence of violence, an adult in the US would experience violence every three seconds. However, because domestic violence is a pattern, many experience repeated acts of abuse annually, so an incident of abuse happens far more frequently than every three seconds.
- 1 in 4 women and 1 in 10 men experience sexual violence, physical violence and/or stalking by an intimate partner during their lifetime with 'IPV-related impact' such as being concerned for their safety, PTSD symptoms, injury, or needing victim services.[2]
    - Approximately 1 in 5 female victims and 1 in 20 male victims need medical care.[3]
    - Female victims sustain injuries 3x more often than male victims.[4]
    - 1 in 5 female victims and 1 in 9 male victims need legal services.[5]
    - 23.2% of women and 13.9% of men have experienced severe physical violence by an intimate partner during their lifetime.[6]
- From 2016 through 2018 the number of intimate partner violence victimizations in the United States increased 42%.[7]
- On a typical day, domestic violence hotlines nationwide receive over 19,000 calls.[8]
- An abuser's access to a firearm increases the risk of intimate partner femicide by 400%.[9]
- In 2018, partner violence accounted for 20% of all violent crime.[10]
- Intimate partner violence is most common against women between the ages of 18-24.[11]
- 19% of intimate partner violence involves a weapon.[12]

Impact

Domestic violence is prevalent in every community, and affects all people regardless of age, socio-economic status, sexual orientation, gender, race, religion, or nationality. Physical violence is often accompanied by emotionally abusive and controlling behavior as part of a much larger, systematic pattern of dominance and control. Domestic violence can result in physical injury, psychological trauma, and even death. The devastating consequences of domestic violence can cross generations and last a lifetime.

Suggested citation: National Coalition Against Domestic Violence (2020). *Domestic violence*. Retrieved from https://assets.speakcdn.com/assets/2497/domestic_violence-2020080709350855.pdf?1596811079991.

NATIONAL COALITION AGAINST DOMESTIC VIOLENCE
NCADV

DOMESTIC VIOLENCE

Sexual assault

- 1 in 5 women and 1 in 40 men in the United States are victims of rape or attempted rape during their lifetime.[13]
- Nearly 1 in 5 women and 1 in 12 men have experienced contact sexual violence by an intimate partner in their lifetime.[14]
- From 2016 through 2018 the number of rape/sexual assault victimizations in the United States increased 146%.[15]

Stalking

- Stalking victimization involves a pattern of harassing or threatening tactics used by a perpetrator that causes the victim to fear for their safety or the safety of others.
- 19.1 million women and 6.4 million men in the United States have been stalked.[16]
- 66.2% of female stalking victims reported stalking by a current or former intimate partner.[17]
- 1 in 10 women and 1 in 50 men have experienced stalking by an intimate partner during their lifetime.[18]

Homicide

- 1 in 2 female murder victims and 1 in 13 male murder victims are killed by intimate partners.[19]
- A study of intimate partner homicides found 20% of victims were family members or friends of the abused partner, neighbors, persons who intervened, law enforcement responders, or bystanders.[20]
- 65% of all murder-suicides are perpetrated by intimate partners.[21]
- 96% of murder-suicide victims are female.[22]
- Most intimate partner homicides are committed with firearms.[23]
- Abusers' access to firearms increases the risk of intimate partner femicide at least five-fold. When firearms have been used in the most severe abuse incident, the risk increases 41-fold.[24]
- While the overall rate of intimate partner has decreased, intimate partner femicide has increased in recent years, driven by an increase in intimate partner femicide committed with a firearm.[25]

Physical & mental effects

- Victims of intimate partner violence are at increased risk of contracting HIV or other STI's due to forced intercourse and/or prolonged exposure to stress. [26]
- Intimate partner victimization is correlated with a higher rate of depression and suicidal behavior.[27]
- Only 34% of people who are injured by intimate partners receive medical care for their injuries.[28]

Economic effects

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- Victims of intimate partner violence lose a total of 8,000,000 days of paid work each year, the equivalent of 32,000 full-time jobs.[29]
- Intimate partner violence is estimated to cost the US economy between $5.8 billion and $12.6 billion annually, up to 0.125% of the national gross domestic product.[30]
- Between 21-60% of victims of intimate partner violence lose their jobs due to reasons stemming from the abuse.[31]
- Between 2003 and 2008, 142 women were murdered in their workplace by former or current intimate partners. This amounts to 22% of workplace homicides among women.[32]

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Domestic Violence in OKLAHOMA

WHAT IS DOMESTIC VIOLENCE?

Domestic violence is the willful intimidation, physical assault, battery, sexual assault, and/or other abusive behavior as part of a systematic pattern of power and control perpetrated by one intimate partner against another. It includes physical violence, sexual violence, threats, economic, and emotional/psychological abuse. The frequency and severity of domestic violence varies dramatically.

DOMESTIC VIOLENCE IN OKLAHOMA

- 40.1% of Oklahoma women[1] and 37.8% of Oklahoma men[2] experience intimate partner physical violence, intimate partner rape and/or intimate partner stalking in their lifetimes.
- In 2019, 37 individuals were victims of intimate partner homicide in Oklahoma. Eighty-one percent of these deaths involved a firearm.[3]
- On a single day in 2020, Oklahoma the domestic violence programs reported serving 948 adult and child victims of domestic violence. During this same 24-hour period, 203 Hotline calls were received, averaging 9 contacts per hour. Fifty-eight requests for services were unmet due to lack of resources.[4]
- Oklahoma is ranked 3rd in the nation for women killed by men in single victim-single offender, homicides.[5]
- In Tulsa alone, the Tulsa police department responded to 5,044 domestic violence calls for service in 2017.[6] Many other incidents went unreported.
- As of December 31, 2020, Oklahoma had submitted 97 misdemeanor domestic violence conviction records and one protective order record to the NICS Index.[7]

DID YOU KNOW?

- 1 in 3 women and 1 in 4 men in the United States have experienced some form of physical violence by an intimate partner.[8]
- On a single day in 2020, domestic violence hotlines received 21,321 calls, an average of almost 15 calls every minute.[9]
- In 2018, domestic violence accounted for 20% of all violent crime.[10]
- Abusers' access to firearms increases the risk of intimate partner femicide at least eleven-fold.[11] When firearms have been used in the most severe abuse incident, the risk increases 41-fold.[12]
- 65% of all murder-suicides involve an intimate partner; 96% of the victims of these crimes are female.[13]

DOMESTIC VIOLENCE-RELATED FIREARMS LAWS IN OKLAHOMA

- Protective orders are required to contain notice that the respondent might be prohibited by federal law from possessing firearms.[14]
- Although judges are not explicitly authorized to prohibit protective order respondents from possessing firearms or require surrender of such firearms, when issuing ex parte and final orders, they are authorized to order whatever relief deemed necessary to protect victims/survivors.[15] This may include prohibiting firearm possession and requiring surrender of firearms and includes dating partners.[16]
- Law enforcement is required to confiscate firearms when responding to domestic violence incidents that result in arrest, if they have probable cause to believe the firearms were used in the abuse.[17]
- Oklahoma could strengthen its laws to protect victims and survivors by
    - Prohibiting domestic violence, dating violence and stalking misdemeanants from possessing firearms or ammunition;

Suggested citation: National Coalition Against Domestic Violence. (2021). *Domestic violence in Oklahoma*. www.ncadv.org/files/Oklahoma.pdf

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Domestic Violence in OKLAHOMA

- Prohibiting respondents to ex parte and final protective orders from possessing firearms or ammunition;
- Requiring prohibited persons to surrender their firearms upon becoming prohibited;
- Requiring background checks for all gun sales and transfers; and
- Requiring law enforcement to confiscate firearms when responding to domestic violence incidents if requested by the survivor.

More information about domestic violence and firearms in Oklahoma can be found at https://www.disarmdv.org/state/oklahoma.

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What is Sexual Violence?

Fact Sheet



Sexual violence affects women, men and children throughout their lives and can be devastating for individuals, families, and communities. However, help is available. Together, we can change the conditions that contribute to sexual violence.

What is sexual violence?

Sexual violence means that someone forces or manipulates someone else into unwanted sexual activity without their consent. Reasons someone might not consent include fear, age, illness, disability, and/or influence of alcohol or other drugs. Anyone can experience sexual violence including: children, teens, adults, and elders. Those who sexually abuse can be acquaintances, family members, trusted individuals or strangers.

Forms of sexual violence

- Rape or sexual assault
- Child sexual assault and incest
- Intimate partner sexual assault
- Unwanted sexual contact/touching
- Sexual harassment
- Sexual exploitation
- Showing one's genitals or naked body to other(s) without consent
- Masturbating in public
- Watching someone in a private act without their knowledge or permission

Facts about sexual violence

FACT: Chances are you know someone who has been sexually assaulted.

- Sexual violence affects people of all genders, ages, races, religions, incomes, abilities, professions, ethnicities, and sexual orientations. However, social inequalities can heighten the risk.
- By age 18, 1 in 4 girls will be sexually assaulted; by age 18, 1 in 6 boys will be assaulted (Finkelhor, Hotaling, Lewis & Smith, 1990).
- At some time in their lives, 1 in 6 women have experienced an attempted or completed rape; more than half occurred before the woman was 18, and 22% before age 12 (Tjaden & Thoennes, 2000).
- During their lives, 1 in 33 men have experienced an attempted or completed rape; 75% occurred before the men were 18, and 48% before age 12 (Tjaden & Thoennes, 2000).

FACT: Victims usually know their assaulter.

- People who sexually assault usually attack someone they know – a friend, classmate, neighbor, coworker, or relative.
- Of adults, 73% knew the attacker, 38% were friends of the attacker, 28% were an intimate partner of the attacker, and 7% were a relative of the attacker (Maston & Klaus, 2005).
- Child victims knew the offender before the attack 90% of the time (Greenfeld, 1996).
- About 40% of sexual assaults take place in the victim's own home. Another 20% occur in the home of a

friend, neighbor, or relative (Greenfeld, 1997).

FACT: Victims are never at fault for a sexual assault.

- It doesn't matter what someone is wearing or how they are acting, no one asks to be raped.
- People who sexually assault often use force, threat, or injury.
- An absence of injuries to the victim does not indicate the victim consented.

FACT: Rape is the least reported and convicted violent crime in the U.S.

There are many reasons why victims may choose not to report to law enforcement or tell anyone about what happened to him/her. Some include:

- Concern for not being believed
- Fear of the attackers getting back at him/her
- Embarrassment or shame
- Fear of being blamed
- Pressure from others not to tell
- Distrust of law enforcement
- Belief that there is not enough evidence
- Desire to protect the attacker

Many victims who do report a rape or sexual assault find that there is no arrest or conviction.

- Probability of arrest after a report is 50.8% (Reynolds, 1999) and the probability of a rapist being sent to prison is 16.3% (Reynolds, 1999).

FACT: Sexual violence is preventable.

By working with your community's sexual assault center, you can:

- Model supportive relationships and behaviors with your friends and families
- Stand up for victims and believe them
- Speak up when you hear harmful comments or witness violent acts
- Create policies at your workplace or school system to stop sexual violence and help victims
- Coordinate a community event to raise awareness about sexual violence or talk with community members about ways they can get involved
- Talk with your legislators and ask them to support prevention and victim services

FACT: Help is available

- Local sexual assault centers can provide help. In crisis situations, contact RAINN at 1-800-656-4673. For more information, visit http://www.nsvrc.org.

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What is Teen Dating Violence?

A pattern or series of abusive behaviors over a course of time that reflects the perpetrator's desire to control, dominate, and exert power over a dating partner.

Physical

- Hitting, slapping, punching, kicking, shoving
- Scratching, pinching, biting, choking, hair pulling
- Grabbing a dating partner's body parts or clothing to prevent partner from leaving or forcing him/her to go somewhere
- Grabbing a partner's face to make him/her look at them
- Throwing a foreign object at a dating partner
- Using a gun, knife, bat, mace, or other weapon

Sexual

- Unwanted kissing, touching, and sexual activity gained through force, pressure, threats, manipulation and/or intimidation
- Sexual assault or attempted sexual assault
- Getting a dating partner drunk/drugged for sex
- Sexual contact with a dating partner who is drunk, drugged, unconscious, or otherwise unable to give a clear and informed "yes" or "no"
- Keeping a dating partner from protecting him/herself from STIs or getting pregnant
- Sexual slurs or attacks on a dating partner's gender or sexual orientation
- Sending unwanted, explicit pictures/videos and/or demanding them in return

Psychological

Verbal and Emotional

- Yelling and screaming
- Name-calling, ridiculing, criticizing, humiliating
- Starting rumors about a dating partner
- Making a dating partner feel guilty or insecure
- Making a dating partner think s/he is irrational
- Emotional blackmailing
- Playing mind games

Threatening to…

- Harm a dating partner or his/her pet or loved ones
- Report a dating partner to police
- Have children taken away
- Expose a dating partner's secrets such as sexual orientation or immigration status
- Leave the dating partner
- Commit suicide

Controlling Behaviors

- Isolation
- Preventing a dating partner from interacting with friends/family
- Controlling what a dating partner does and who s/he sees and talks to

Includes telling the dating partner who he/she can and can't be friends with on social media and constantly checking and sending texts, emails, etc.

Intimidation

- Stalking
- Using looks, actions, gestures to scare a dating partner
- Smashing things/destroying personal property
- Displaying weapons

Manipulation

- Blaming dating partner's actions for perpetrator's abusive or unhealthy behavior
- Forcing a partner to drop charges/do illegal activities
- Using jealousy to justify actions
- Minimizing – making light of the abuse and not taking concerns about it seriously
- Denying the abuse happened
- Shifting responsibility for abusive behavior

Any of these behaviors can be perpetuated via electronic methods (i.e. phone calls, texts, emails, social media, etc.)

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Teen Dating Violence Statistics

*Nearly **1.5 million high school students** nationwide experience physical abuse from a dating partner in a single year.*[1]

The Victims/Survivors*

- **One in three adolescents** in the U.S. is a survivor of physical, sexual, emotional, or verbal abuse from a dating partner, a figure that far exceeds rates of other types of youth violence.[1,2]
- **Girls and young women between the ages of 16 and 24** experience the highest rate of intimate partner violence – almost triple the national average.[1,3]
- **Nearly one in four girls (23%) who have been in a relationship** reported going further sexually than they wanted as a result of pressure.[2]
- Only **33% of teens** who were in a violent relationship ever told anyone about the abuse, and **86%** said they would confide in a friend rather than a caring adult.[1,4]
- **Hispanic immigrant girls have less than half** the risk of TDV as their non-immigrant Hispanic peers.[6]
- TDV is extremely common in LGBTQ relationships – **up to 50% of LGBTQ individuals** will be abused by a dating partner.[7]

**The terms victims and survivors are both used because sometimes individuals identify as one or the other.*

***1 in 5 high school female students** are physically and/or sexually abused by their dating partner.*[4]

The Perpetrators

- Violent behavior typically begins **between the ages of 12 and 18**.[1] **More than 50% of sexual assaults** are committed by a woman's romantic partner.[9]
- **Individuals with a history of physical violence against their partners are 13 times more likely** to commit future acts of physical aggression compared to persons who have never committed this form of physical abuse.[9]
- Youth who engaged in high rates of self-reported **bully perpetration during middle school were almost 7 times more likely** to engage in physical TDV perpetration four years later in high school.[10]

The Bystanders

- **81% of parents** believe TDV is not an issue or admit they don't know if it's an issue for teens.[1,4]
- **Over 80% of high school counselors** report feeling unprepared to address incidents of abuse on their school campus.[2]
- **50-80% of teens** have reported knowing others who were involved in violent relationships.[3]
- **57% of teens** say they know of a peer who has been physically, sexually, or verbally abusive to their dating partner. **33% of teens** have actually seen the abuse or violence themselves.[4]

Risks of Teen Dating Violence

- **Half of youth survivors** of both TDV and sexual assault attempt suicide, compared to **12.5% of non-abused girls** and **5.4% of non-abused boys**.[1]
- Physical or sexual abuse makes **teen girls 6 times more likely** to become pregnant and **twice as likely** to get an STI.[1]
- Survivors of TDV are significantly more likely to use drugs, smoke, or drink alcohol than those who did not experience abuse.[5]

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STALKING & INTIMATE PARTNER VIOLENCE: FACT SHEET

There is a real and frighteningly significant connection between stalking and intimate partner violence. Stalking often co-occurs with intimate partner violence and can be an indicator of other forms of violence. Stalking can be a way to exert power and control during and/or after an abusive relationship.

DID YOU KNOW?

- 40% of stalking victims are stalked by current or former intimate partners.[A]
- 57% of intimate partner stalking victims are stalked during the relationship.[B]
- 74% of those stalked by a former intimate partner report violence and/or coercive control during the relationship.[C]
- 81% of women stalked by a current or former husband or cohabitating partner were also physically assaulted by that partner.[D]
- 31% of women stalked by an intimate partner were also sexually assaulted.[E]
- 41% of victims stalked by a current intimate partner and 35% stalked by a former intimate partner experience threats of harm, compared to 24% stalked by a non-intimate partner.[F]
- The average length of partner stalking is 2.2 years (longer than the average of just over 1 year for non-intimate partner cases).[G]

STALKING & PARTNER HOMICIDE

- Stalking increases the risk of intimate partner homicide by three times.[H]
- The most common use of the criminal justice system prior to attempted or completed intimate partner homicide was reporting intimate partner stalking.[I]
- Among female victims of attempted and completed intimate partner homicide by male partners, in the 12 months prior to the attack:[J]
  - 85% of attempted and 76% of completed homicide victims were stalked.
  - 91% of attempted and 89% of completed homicide victims who had been physically abused during the relationship had also been stalked.
  - 46% of attempted and 54% of completed homicide victims reported stalking before the attack, most commonly to police.

INTIMATE PARTNER STALKING OFFENDERS

- Abusive partners who stalk are more likely (than abusive partners who do not stalk) to verbally degrade, threaten, use a weapon to attack, sexually assault, and/or physically injure their victims.[K]
- Intimate partner stalkers are more likely (than stalkers who are not intimate partners) to:
  - Use the widest range of stalking tactics.[L]
  - Contact and approach victims more frequently.[M]
  - Assault their victims.[N]
  - Be insulting and interfere in the victim's life.[O]
  - Escalate the frequency and intensity of pursuit more often.[P]
  - Threaten victims with weapons or actually use weapons on their victims.[Q]
  - Be threatening to their victims and reoffend.[R]
  - Follow through on threats of violence.[S] One study found that among stalking victims threatened, 71% of intimate partner victims were actually assaulted compared to 33% of non-intimate partner victims.[T]
  - Assault third parties.[U]
  - Reoffend after a court intervention and reoffend more quickly.[V]
- The risk of physical violence is heightened when the intimate partner stalker:[W]
  - Issues direct threats of violence;
  - Expresses jealousy of the victim's relationships with others during the relationship; and
  - Uses illegal drugs.

STALKING & SEPARATION

- Victims stalked by violent partners report more separation attempts than partner violence victims who were not stalked.[X]
- Intimate partner stalking made victims more likely to want to leave the relationship than other factors, including psychological aggression and injury.[Y]
- Stalking after a separation may increase the risk of violence.[ZAABB]

SPARC STALKING PREVENTION, AWARENESS, AND RESOURCE CENTER

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STALKING & INTIMATE PARTNER VIOLENCE: FACT SHEET

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Children's Exposure to Domestic Violence Fact Sheet

Overview

The traumatic effects of domestic violence can impact more than just adult survivors. Children who are exposed to the abuse of a parent or guardian can face increased health risks, higher likelihood of engaging in or experiencing violence, difficulties in school, and psychological or developmental impairments. However, there are numerous protective factors that can promote resilience in children and youth, and can support their ability to heal and find wellness. By being aware of the impact of domestic violence on children, service providers and professionals who work with youth can be more trauma-informed and child-centered in their approach.

- **Domestic violence:** refers to a pattern of behavior that one partner uses to control the other and includes physical, emotional, psychological, sexual, or financial abuse.
- **Children's exposure to domestic violence:** refers to when a child directly witnesses the abuse of a parent or guardian, notices the aftermath, or generally experiences the dynamic of abuse in the home.

Prevalence

The research and data available about children's exposure or experience of domestic violence demonstrates the need for screening and support to child victims and non-abusing caregivers. Child advocates note that this data may suffer from underreporting, given children's dependence on adults and the stigma of domestic violence.

- According to the 2008 National Survey on Children's Exposure to Violence, 1 in 4 children (26%) had been exposed to family violence in their lifetime. 1 in 15 (6.6%) had been exposed to intimate partner violence involving a parent in the last year.
- A 2003 study published by the Journal of Interpersonal Violence indicated that 15.5 million children in the United States lived in families where partner violence took place in the past year, and seven million children lived in families where severe partner violence took place.

Impact

The effects of witnessing and experiencing domestic violence can have damaging short- and long-term effects on children's emotional, psychological and physical wellness. This points to the need for professionals who work with youth to be

trauma-informed in their practice, and to understand the impact that adverse childhood experiences (ACES) can have on their developmental growth and behavior.

- A 1997 study conducted by the Centers for Disease Control (CDC) and Kaiser Permanente found that children who experience childhood trauma (including witnessing domestic violence) were more likely to have serious adult health problems such as depression, heart disease, substance abuse, tobacco use, and a higher risk of unintended pregnancy. They were also more likely to experience symptoms of anxiety, suicidal thoughts, and post-traumatic stress disorder (PTSD).
- Futures Without Violence notes that children who witness domestic violence can experience changes in emotions (such as mood swings, fearfulness, and aggression) and behavior (such as sleep troubles, temper tantrums, and separation anxiety).

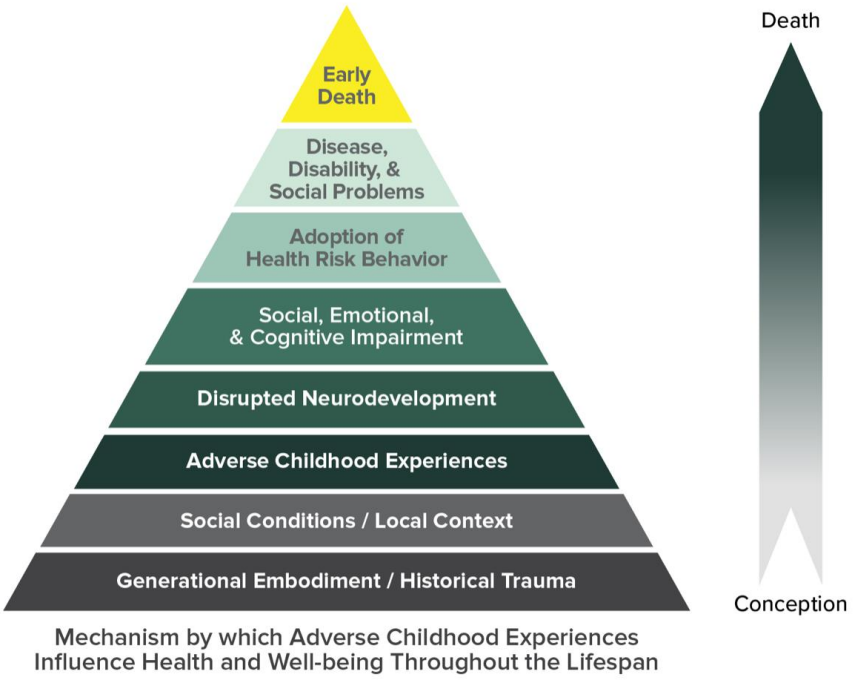


Image Credit: ACE Pyramid, CDC

Protective Factors

Resilience is the ability for an individual to be well despite hardship or trauma. Many protective factors at the individual, family, community, and societal level can promote resilience in children who have witnessed domestic violence. Most significantly, a positive relationship with non-abusing caregivers can provide much needed love, support, and safety to children. Service providers can promote this protective factor by engaging non-abusing caregivers in programming and services,

such as offering counseling to both the adult and child at the same time. Other protective factors include feelings of connection to community and culture, healthy relationships with other adults and peers, consistent attendance at school, and strengthened emotional literacy and self-calming techniques. For further learning, read "Protective Factors for Survivors of Domestic Violence" from the Quality Improvement Center on Domestic Violence in Child Welfare

Promising Interventions

There are many promising trauma-informed therapeutic interventions for children and youth exposed to domestic violence. There is no single "one size fits all" approach, so it is important for advocates, youth serving organizations, schools, and protective parents to be informed about the variety of practices available, as well as the credentials and training of the individual providing the therapeutic intervention. The National Child Traumatic Stress Network has developed fact sheets and assessment tools to help with the process. Additionally, Futures Without Violence has compiled a list of evidence-based practices for prevention, intervention/treatment, and systems response programs for children exposed to violence. All interventions should be trauma-informed, culturally responsive and centered on fostering resilience, healing and hope for children exposed to violence and harm.

Getting Support

In addition to on-the-ground support from the OVW Children & Youth and Engaging Men grantee programs across the country, much work is being done to understand how to support children who have witnessed or experienced domestic violence.

- ACEs Aware offers resources for clinicians on screening and responding to Adverse Childhood Experiences
- The National Child Traumatic Stress Network maintains a resource library of fact sheets (in English and Spanish) for parents and service providers about intimate partner violence and children
- Promising Futures is a useful resource for helping programs transform or enhance their ability to effectively meet the needs of women, children and youth experiencing domestic violence. The site includes fact sheets, program readiness assessments, intervention models, and more.
- Read Futures Without Violence's publication entitled "Everyday Magic: 16 Ways Adults Can Support Children Exposed to Violence and Trauma"

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SERVING OUR YOUTH

Children's Exposure to Domestic Violence Action Sheet

To commemorate October as Domestic Violence Awareness Month, the Serving Our Youth team has compiled a list of tangible ways grantees and their communities can take action to support children who are exposed to domestic violence.

Community Based Programs Who Work with Youth

Build trusting, supportive, and dependable relationships with the youth you work with.

Having positive adults in their lives who consistently make time to check in and offer support can be a major protective factor for youth who have witnessed domestic violence.

Disrupt hurtful or oppressive language and behavior when you see it. Co-create community agreements to set expectations in your space.

Whether it comes from youth or adults, be clear that controlling behavior, put-downs, and violence are not tolerated in your space. Letting this language or behavior go unaddressed can make students feel like your space is not safe for them, and can further trigger or traumatize them.



Audit your agency's youth-facing programs for safety and climate.

Doing an organization-wide audit can help you understand what gaps in your services there are, and where safety for youth can be increased to avoid re-traumatization. The BE SAFE Project has developed an evaluation form that can help with assessments.

Understand what evidence-based practices support children exposed to violence.

The U.S. Department of Justice and U.S. Department of Health and Human Services has compiled a list of evidence-based practices for prevention, intervention/ treatment, and systems response programs for children exposed to violence.

Understand and communicate your mandated reporter status.

Make sure that the youth you work with understand what your mandated reporter status means for them, so they don't feel betrayed if you have to call child protective services. If you have to call, notify a non-abusing caregiver and evaluate the immediate safety needs of the child.

Creating Safe & Supportive Schools

Be prepared to support safety planning at school with trauma-informed policy that all school staff are trained on and understand how to implement.

Students who have been exposed to domestic violence may have additional safety needs at school (e.g. enforcing orders of protection or making sure only a non-abusing caregiver picks them up from school).



Communicate to families and youth what resources and services are available through your school and in the community.

Building partnerships with domestic & sexual violence resource organizations can help streamline the referral process to get children and/or non-abusing caregivers counseling, court advocacy, and safety plannng.

Embrace trauma-informed practices school-wide.

Experiencing trauma can impact students' mental health, behavior, academic performance, and feelings of safety. Trauma-informed practices understand the role of trauma in context and promote students' resilience. To learn more about trauma-informed schools, visit the National Education Association's Trauma-Informed Schools page, or TraumaAwareSchools.org.



Promote healthy relationships messaging and programming school-wide and for all grade levels.

Violence prevention programming can help assert healthy/unhealthy relationship behaviors and de-normalize violence. If possible, have a youth advocate or counselor in the room who can respond to potential disclosures from students.

Engaging Men and Boys

Be a loving and consistent presence.

We know that mentoring boys and young men requires nurturing and structure as key ingredients to healthy development--whether you're a relative, teacher, coach, or a youth-serving professional. These two elements are the main philosophy of guiding boys and young men, especially those exposed to violence.



Lead with empathy.

As Dr. Brené Brown points out, empathy is something you do—it's an action that doesn't seek to fix things, but instead seeks to create a healthy, supportive connection. If someone discloses to you, remember to begin by listening and offering an empathetic response, before moving into how you can help.

It's okay to wait on the tough issues.

Domestic violence can bring complicated feelings that are difficult to name or talk about, especially given stigmas unique to boys and men. Give yourself time to build relationships to create a solid foundation for the hard discussions later.

Define your own manhood, and share with other boys and men.

Consider how common messages like "don't let a woman push you around" play a role in creating unhealthy versions of manhood and unsafe relationships for women and children. Men can decide to define themselves through healthy actions and language, and the boys and young men you work with can learn from you.



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Victim Services Programs

Policies and Procedures Manual

Community Action Agency

REVISIONS APPROVED BY THE BOARD OF DIRECTORS
November 8, 2022

David Hawkins

David Hawkins, Board Chairman

THIS INSTITUTION IS AN EQUAL OPPORTUNITY PROVIDER AND EMPLOYER.

The purpose of this Policies and Procedures Manual is to establish operating procedures that are standard throughout LIFT Community Action Agency's Victim Services Programs (hereafter referred to as LIFT CAA), to protect the employees and to preserve the integrity of the programs. This manual shall serve as one document to be used by all persons. As the agency grows, it may become necessary to amend the plan. When this occurs, staff members will be informed of the amendments. It is the responsibility of each Victim Services Program employee, volunteer, and LIFT CAA Board Member to read this manual and to become familiar with the provisions.

MISSION

The mission of LIFT CAA's Victim Services Programs is to provide relief and support for persons who have suffered physical or emotional abuse as a result of domestic violence, sexual assault, and stalking; to empower those who have lived in violent relationships and those who are survivors of sexual assault and stalking by utilizing the concepts of individual worth, choice, self-determination and independence; to assist those persons to utilize community resources for the establishment of healthy familial relationships and self-growth; to eradicate the myths and ignorance by enlightening and educating the communities served; and to advocate unceasingly for a non-violent society. In accordance with this mission, LIFT CAA serves and is served by persons of all age, economic, ethnic, lifestyle, racial, religious and social groups.

The mission of the LIFT CAA's Court Appointed Special Advocates (CASA) Program is to provide a volunteer to serve as advocate for every abused or deprived child who comes before our District Court. A further mission of the CASA program is to raise community awareness of the needs of abused children, and to develop ways the community can participate in meeting those needs.

Philosophy

The philosophy for service provision for victims of domestic violence, sexual assault is that: All persons have the right to live without fear, abuse, oppression, violence, and child abuse. There should be equality in relationships and survivors of domestic violence, sexual assault and stalking should be helped to assume power over their own lives. Survivors should be treated with dignity and respect; all people involved in violent crimes are affected – victims, children, families, partners, friends, the community, and perpetrators. Offending is a choice, and perpetrators of domestic violence, sexual assault and stalking are solely responsible for their behavior, and they should be held accountable for their behavior. A coordinated community response is the best approach to eliminating domestic violence, sexual assault and stalking in Oklahoma; intervention and services shall be based upon the safety and well-being of individuals and communities. Services shall be provided in a non-judgmental, voluntary, non-coercive manner and take place in a safe, trauma-informed environment. Services should encourage self-determination, autonomy, physical and emotional safety, and provide information that will enable independence. Services shall respect cultural diversity by recognizing the spectrum of differences that exists among groups of people with definable and unique cultural backgrounds. Services shall be delivered from an approach that recognizes the impact of trauma and acknowledges the role of trauma in the lives of victims/survivors and their dependents.

LIFT CAA VICTIM SERVICES PROGRAMS

I. CORE SERVICES

a. It is the policy of LIFT CAA's Victim Services Programs to serve residential and non-residential victims of domestic violence, sexual assault, and stalking, and their dependents or family members. The Court Appointed Special Advocates (CASA) Program utilizes trained volunteers to be the voice of children (from birth to age 18) who have been victims of abuse and/or neglect. The Safe Place Healing Hearts Program directly serves and works to enhance the safety of rural victims of sexual assault, domestic violence, dating violence, and stalking. The Victim Advocacy Services Program provides direct, supportive services to all types of victims, including domestic violence and/or sexual assault. All aspects of the service components within these programs are completed through the work of agency staff and volunteers, as detailed in this Manual.
b. LIFT CAA shall provide safe, accessible, and trauma-informed services for victims of domestic violence, sexual assault, and stalking, and their dependents or family members.
c. LIFT CAA shall have a philosophy of service provision based upon voluntary services and individual self-determination. The written statement of the philosophy of services shall be approved by the governing Board of Directors and made available to the community, staff, volunteers and clients.
d. LIFT CAA shall have policies and procedures to maintain facilities, staffing, and operational methods, including a policy for recruitment of board members, staff and volunteers who are representative of diversity in the local community and of clients served.
e. LIFT CAA shall provide sexual assault services.
f. LIFT CAA shall offer crisis intervention services (see Section II).
g. LIFT CAA shall offer danger assessment, safety planning, counseling or support, support groups, and advocacy in a trauma-informed environment.
h. LIFT CAA shall maintain an atmosphere of and offer services that are free from all forms of unlawful discrimination based on race, gender, religion, color, age, national origin, and/or disability (i.e., physical, mental illness, and substance abuse). Services to immigrant women will not be denied or diminished on the basis of immigration status.
i. LIFT CAA shall provide public education to increase the community's awareness and understanding of domestic violence, sexual assault and stalking, available and needed resources, and to identify the role community can play in eliminating domestic violence, sexual assault, and stalking.
j. The programs, in compliance with 75:15-9-2 Program Management, shall maintain written policies procedures which describe each program service component, the rules clients are expected to follow for each component, and staff or volunteer duties. Policies shall include but not be limited to: physical punishment of children shall not be allowed; length of stay limitations (if any); and participation in housekeeping, food preparation or other activities (if applicable). Rules shall be visibly posted in client areas. Clients shall be given a copy of program rules and the provision of such shall be documented in the client record. The programs shall

have a written policy of the intent to comply with the Americans with Disabilities Act of 1990. Compliance with 75:15-9-2 shall be determined by a review of the program's written policy and procedures rules; client interviews/record documentation, and on-site observation.

II. CRISIS INTERVENTION SERVICES

LIFT CAA shall offer trauma-informed crisis intervention services, to include the following:

a. Crisis telephone services staffed twenty-four (24) hours per day by trained staff or volunteers, and 24-hour immediate, direct access to crisis advocates. Pagers, answering machines or answering services shall not be used.
b. Emergency housing such as hotel or motel available for victims and their dependent(s).
c. Arrangement for safe shelter, food, clothing, and incidentals as needed by victims and dependents.
d. Twenty-four (24) hour emergency transportation or access to transportation for necessary and emergency services (i.e. shelter, to and from SANE exams, etc.). This provision shall not require service providers to be placed in a situation that could result in injury.
e. Cooperation with law enforcement to offer assistance to the victim and accompanying dependent(s). LIFT CAA will ensure victims are educated about participating in the legal prosecution of their offender and that an appropriate release or waiver may be necessary.
f. Provision of advocacy and referral to assist victims in obtaining needed services or resources.
g. Foreign language interpretation.
h. Follow-up services to all victims, if victim safety is not compromised. Clients who give permission for follow-up services will be contacted within two (2) weeks of initial contact.
i. Group and/or individual counseling or support services, made available before or after normal business hours (8 am to 5 pm), if needed by clients. These services shall minimally offer the following:
    1) A facility with offices, and individual and group counseling space to offer services.
    2) Advocacy services, both in person and by telephone, either in the locations of other community services and systems, or in the program's offices. Other locations include, but are not limited to, those necessary to provide court advocacy services to clients.
    3) Service approaches shall focus on the empowerment of victims to access needed resources and to make healthy and safe decisions for themselves and dependents.
j. LIFT CAA shall maintain at a minimum the following client resources:
    1) Service agreements with community service providers for client services, which shall be renewed every three (3) years; if unable to establish a service agreement, attempts shall be documented;
    2) A resource document of local, area, or state resources to facilitate referrals for clients;
    3) An updated list of identified behavioral health professionals in the community who treat clients with related trauma and need mental health or substance abuse services, since LIFT CAA does not have a behavioral health professional on staff.

III. SEXUAL ASSAULT SERVICES

a. LIFT CAA is and shall continue to serve as an active member of the Sexual Assault Response Team/Coordinated Community Response Team in each county of its service area (Choctaw, McCurtain, and Pushmataha Counties). In addition, LIFT CAA collaborates with other certified DVSA providers in the service area. At a minimum, LIFT CAA shall offer the following services:
    1) Counseling or advocacy and support services offered at any safe and appropriate site (LIFT CAA offices, law enforcement, legal, medical or social service setting), as needed by the client.
    2) A twenty-four (24) hour crisis line, crisis intervention, in-person advocacy, active listening, and support by trained staff or volunteers with a knowledge of the issues and processes of sexual assault, rape trauma recovery, assessment, referral when indicated, and family involvement when chosen by the victim.
    3) Clothing, if needed, for the sexual assault victims.
    4) Follow-up contact that does not compromise privacy and safety needs of the victim shall be offered to all sexual assault clients seen in the medical setting.
b. If written permission is granted by the client for follow-up contact, it shall be done no later than fourteen (14) business days after face-to-face crisis intervention. Follow-up will offer agency services or other available resources needed by the client.
c. When appropriate staff or volunteers are available, LIFT CAA shall assist the Council on Law Enforcement Education and Training (CLEET) by providing appropriate staff or volunteers to assist in sexual assault and sexual violence training to law enforcement.
d. Since LIFT CAA does not have a behavioral health professional on staff, the agency shall maintain an updated list of identified behavioral health professionals within the service area who treat clients with sexual assault-related trauma.

IV. CHILDREN SERVICES

LIFT CAA client records for children shall contain, at a minimum, the following information:

a. Intake and screening information
    1) Client's name
    2) Date of initial contact/intake
    3) Age
    4) Pertinent medical information
    5) Mother’s name
    6) Father’s name
    7) Adult client's abuser (if different from child’s biological father)
b. Custody
    1) Has a court entered a custody order? If yes, what does the order provide?
    2) With whom does the child physically reside?
    3) Does the child have contact with the adult client's abuser?
    4) Is visitation court ordered with the abuser?
c. Safety (including but not limited to)
    1) History of child abuse or neglect

2) Exposure or witnessing violence
3) Child's response to witnessing violence
4) History of involvement in the child welfare system, including the presence of current child welfare involvement

d. Service notes, which shall minimally include:
    1) Date
    2) Location
    3) Start time
    4) Duration
    5) Description of services provided delineated by time spent and service code, if applicable, or documentation of referral to other services or case management.
e. Within five (5) business days of entry into residential services (excluding advocacy, children's activities or crisis intervention), LIFT CAA shall offer to assess the risk and needs of the children accompanying primary victims as well as offer children's services to address the impact of violence and trauma in their lives and to facilitate healing. A risk and needs screening and assessment on each child, when accepted, shall minimally include:
    1) Brief trauma screening to assess the impact of trauma;
    2) Developmental history to include speech and language, hearing and visual;
    3) Medical or physical health history;
    4) Social history to include interactions with peers;
    5) History of use of tobacco, alcohol or other drugs;
    6) Parent/guardian custodial status;
    7) Community referral needs.
f. Services provided to each child shall be culturally sensitive while addressing the identified risks and needs, and shall minimally include:
    1) safety planning that is appropriate with respect to the child or adolescent's age, development, and education;
    2) a specific safe, protected play area for children;
    3) advocacy with community systems;
    4) referral to community resources for needed services;
    5) linkage and advocacy with the local school system to provide for ongoing educational needs;
    6) parenting support for clients, if applicable; and
    7) Children's groups using age-appropriate topics and based on established best practices.
g. Pursuant to Title 10A O.S. § 1-2-101, any person having reason to believe that a child under the age of eighteen (18) years is a victim of abuse or neglect shall report the matter promptly to the Department of Human Services.

V. CLIENT RECORDS

a. LIFT CAA shall have and maintain a master client index system containing the client's name and the victim services program’s discreet numerical or letter identifier.

b. No identifying information such as initials, age, year of birth, or gender shall be part of the client ID. The same discreet identifier shall be the client ID that is entered into the Oklahoma Office of Attorney General database without further encryption.
c. In accordance with Oklahoma Office of Attorney General standards, LIFT CAA shall correct errors on record material by lining through, initialing the error, and inserting the correct material either above the error or at the end of the entry. LIFT CAA forbids the use of "white-out" or any action which obliterates the error.

VI. RECORD CONTENT – GENERAL

LIFT CAA client records shall contain, at a minimum, the following information:

a. Intake and screening information
    1) Client's name
    2) Date of initial contact/intake
    3) Pertinent medical information
    4) Emergency contact information
    5) History/nature of abuse, including an evidence-based, dangerousness assessment and screening for stalking and trauma, including a description of the event that precipitated the request for services and safety planning
    6) Screening for strangulation and head trauma, if applicable, information shall be given to client
    7) Perpetrator information, if known.
b. Service notes, which shall minimally include:
    1) Date
    2) Location
    3) Start time
    4) Duration
    5) Description of services provided delineated by time spent and service code, if applicable, or documentation of referral to other services or case management.
    6) Signature of staff and volunteer providing the services.
c. The service plan, which shall focus on victim safety and well-being, and shall minimally include:
    1) Goals and objectives of the client, which shall be agreed upon between the client and staff or volunteer.
d. Exit information, which shall minimally include:
    1) Documentation that the client participated in planning for the client's exit
    2) The reasons for the client's exit or departure
    3) Client and staff or volunteer dated signatures or an explanation if staff or the volunteer were unable to obtain the client’s signature.
e. Each client record entry shall be legible.
f. Each client record entry shall be dated by the staff member or volunteer making the entry.

VII. RECORD CONTENT – SERVICE SPECIFIC

LIFT CAA client records for specific services shall conform to the following:

a. Crisis Intervention Services
    1) All face-to-face contacts with active clients are documented and contacts with persons not receiving additional services shall be offered and documented. Documentation shall minimally include:
        i. Staff/Volunteer Name and signature;
        ii. Date, time, length, and location of intervention;
        iii. Safety planning based on risk;
        iv. Client's name, age, race, county of residence, and contact number if given;
        v. Protective order information if applicable;
        vi. Personnel involved such as police, hospital, etc.;
        vii. Summary of contact, including injuries observed and services requested;
        viii. Outcome.
    2) All telephone contacts shall be documented. Documentation shall minimally include:
        i. Staff/Volunteer name;
        ii. Date, time and length of call;
        iii. Safety planning based on risk;
        iv. Caller's name and contact number, if given; however, no caller shall be required to give a name, phone number or any other identifying information as a condition to receive information or domestic violence, sexual assault or stalking services;
        v. Summary of the call, including services needed and offered;
        vi. Outcome.
    3) Contact information is kept by the program.
    4) Clients to be transported to shelter facilities shall be screened before the shelter referral is made. If the client is in immediate danger, or no safe housing is available, this screening may be initially waived. If the screening is waived, documentation shall reflect the reason(s) and the notification of such to the shelter.
b. Counseling, Support, and Advocacy
    1) LIFT CAA does not employ a counselor(s). Referrals are made to local counseling services. LIFT CAA does provide Support and Advocacy Services, with documentation to include:
        i. An assessment of the client's needs, completed by the third (3rd) advocacy session; if a client declines to participate, staff or volunteer shall document offer of services;
        ii. A service plan, completed by the fifth (5th) advocacy session; if a client declines to participate, staff or volunteer shall document offer of services;
        iii. A service plan review and update shall be completed at a minimum of once every six (6) months; if a client declines to participate, staff or volunteer shall document offer of services.
c. Sexual Assault Services

1) For victims who continue in support sessions, a service plan shall be developed by the fifth (5th) visit; If a client declines to participate, staff or volunteer shall document offer of services; and
2) Service plans shall be reviewed and updated at a minimum of once every ninety (90) days; if a client declines to participate, staff or volunteer shall document offer of services.

VIII. CLIENT CONFIDENTIALITY

LIFT CAA's Victim Services Programs must comply with both State and Federal laws governing confidentiality and any exceptions to those laws.

a. State Law: Case or client records, files or notes, of a DVSA program shall be confidential and shall only be released under certain prescribed conditions (74 O.S. § 18p-3).
    1) The case records, case files, case notes, client records, or similar records of LIFT CAA or of any employee or trained volunteer of a program regarding an individual who is residing or has resided in such program or who has otherwise utilized or is utilizing the services of any domestic violence or sexual assault program or counselor shall be confidential and shall not be disclosed.
    2) For purposes of this subsection, the term "client records" shall include, but not be limited to, all communications, records, and information regarding clients of domestic violence and sexual assault programs.
    3) The case records, case files, or case notes of programs specified in paragraph 1 of this subsection shall be confidential and shall not be disclosed except with the written consent of the individual, or in the case of the individual's death or disability, of the individual's personal representative or other person authorized to sue on the individual's behalf or by court order for good cause shown by the judge in camera.
b. Federal Law:
    1) VAWA- 42 U.S.C. § 13925 (b)(2).Federally, the U.S. Violence Against Women Act January, 2006 and mandates that programs that receive VAWA funds may not reveal personally identifying information about victims without "reasonably time-limited," written, and informed consent.
    2) Under this provision, VAWA-funded programs are prohibited from disclosing personally identifying victim information to any third party, including to any database operated by any party outside of the domestic violence program.
    3) "Reasonably time-limited" is not defined in the statute, but it is determined by the circumstances and the purposes for which the client is requesting the release of information. It could be a few minutes, a few hours, or a few days. In no event should it be for more than 60 days.
    4) FVPSA U.S. Family Violence Prevention and Services Act (FVPSA) each have specific confidentiality protections that apply to many domestic violence and sexual assault programs. (42 U.S.C. 10402(a) (2) (E)). Grantees and subgrantees under this title shall

protect the confidentiality and privacy of persons receiving services. Subgrantees shall not:

i. Disclose any personally identifying information or individual information collected in connection with services requested, utilized, or denied through grantees' and subgrantees' programs; or

ii. Reveal individual client information without the informed, written, reasonably time-limited consent of the person (or in the case of an unemancipated minor, the minor and the parent or guardian or in the case of persons with disabilities, the guardian) about whom information is sought, whether for this program or any other Federal, State, tribal, or territorial grant program, except that consent for release may not be given by the abuser of the minor, person with disabilities, or the abuser of the other parent of the minor.

IX. WAIVER OF CONFIDENTIAL INFORMATION

a. For a waiver of confidentiality to be valid, it must:
    1) Be voluntary;
    2) Relate only to the participant or the participant's dependents;
    3) Clearly describe the scope and any limitations of the information to be released;
    4) Include an expiration date; and
    5) Inform the participant that consent can be withdrawn at any time, orally or in writing.
b. LIFT CAA may only share the specific information the client allows in the release. The client chooses when, how and what personal information will be shared or not shared, and with whom.
c. Even when a court mandate requires LIFT CAA to disclose or release information about the client, the program may only share the minimum information necessary to meet the statutory or court mandate.
d. The program/LIFT CAA shall notify the victim of any disclosure and continue taking steps to protect the victim's safety and privacy.
e. A valid written release form for disclosure of client information shall have, at a minimum, the following elements:
    1) the specific name or general designation of the program or person permitted to make the disclosure;
    2) the name and title of the individual within the organization to which disclosure is to be made;
    3) the name of the client whose records are to be released;
    4) the purpose of the disclosure;
    5) a description of the information to be disclosed;
    6) the dated signature of the client or authorized representative or both when required;
    7) a statement of the right of the client to revoke the release in writing and a description of how the client may do so; and

8) an expiration date, specified event or condition which, if not revoked before, shall ensure the release will last no longer than reasonably necessary to serve the purpose for which it is given. In no event shall the waiver extend for longer than sixty (60) days.

f. Clients choosing to allow disclosure or sharing of information with police, prosecutors, the Oklahoma Fatality Review Board, or others indicated in the event that the client dies (due or not due to domestic violence) shall sign an "in the event of my death" exception.
g. LIFT CAA will ensure confidentiality of client information and identity and govern the disclosure of information, including verbal disclosure contained in client records. When a client record is established, the program shall discuss the confidentiality requirements with each client and maintain documentation in the client record that they have reviewed the circumstances under which confidential information may be revealed.

X. PHYSICAL SAFETY AND INTEGRITY OF CLIENT RECORDS

a. LIFT CAA shall safeguard client records and information contained therein against loss, theft, defacement, tampering, or unauthorized access or use. Information databases will be password-protected and client records will be stored in a secure, locking cabinet in the staff office, which will be locked whenever left unattended. No files will be left in public view.
b. Only those program staff members and volunteers who have completed required training shall have access to client files.
c. Client identifying information will not be released without written consent as described under Section IX.

XI. CLIENT RECORD, HANDLING, RETENTION, AND DISPOSAL

a. LIFT CAA's policies and procedures addressing the storage, retention period, and method of disposal of client records shall be compatible with protecting clients' rights against unauthorized confidential information disclosures.
    1) Client records shall be stored in a manner in which they are easily retrieved by staff or volunteers as need for providing and documenting services.
    2) All client files shall be maintained in a locked cabinet for a period of seven (7) years after the date of discharge.
    3) The client's file in its entirety shall be shredded in a manner as to maintain client confidentiality seven (7) years after the client's discharge. The Executive Director will assign the job of shredding the files to appropriate staff.

XII. PHYSICAL PLANT, PRIMARY ROLE

a. The primary role of LIFT CAA's Victim Services Programs is to offer safety as well as protect the confidentiality and privacy of victims of domestic violence, sexual assault or stalking and their dependent family members. All physical plants of LIFT CAA shall not be utilized in any manner that fails to guarantee the confidentiality, safety, and protection of the victims, their dependents and staff or volunteers.

b. LIFT CAA's Victim Services Programs do not currently serve batterers. In the event that LIFT CAA begins to provide services to batterers, the agency will develop written procedures to ensure that those services do not jeopardize the safety and psychological well-being of victims.
c. LIFT CAA's facilities shall meet the safety, zoning, and building code regulations required by local, state, and Federal authorities.
d. LIFT CAA's facilities shall each have a first aid kit and fire extinguishers, maintained annually.

XIII. DISASTER PROCEDURES

a. There shall be written procedures describing the emergency plans in case of a disaster, whether internal or external, or in case of threat to the safety of any client, staff or volunteer. Evacuation routes, inside sheltering sites, and fire extinguisher locations shall be posted.
b. An annual fire and safety inspection shall be conducted at all locations by State Fire Marshall. A record of the inspections will be kept at the administrative offices.
c. Fire extinguishers, Alarm panel and sprinkler system are to be inspected by a certified inspector annually and maintained as necessary.
d. Staff/volunteers shall know the exact location, contents and use of first aid kits.
e. Battery powered exit signs will indicate egress route at each location as determined by the fire marshal.
f. Battery powered emergency egress lights are mounted at various locations throughout the facilities as determined by the Fire Marshal. In the event that the emergency backup lighting fails, flashlights shall be placed in various accessible areas of the facilities.
g. Disaster Procedures have been created. All staff will be trained during orientation and yearly in these procedures.
h. Fire, tornado, bomb threat and intruder drills shall be conducted annually. The date, time, and type of drill shall be documented.

XIV. PERSONS WITH SPECIAL NEEDS

a. Pursuant to the Americans with Disabilities Act of 1990, LIFT CAA shall ensure that persons with disabilities are not excluded from services. Programs are required to integrate a person with a disability into agency services, unless providing separate services is the only way to offer equal opportunities for services.
b. Referrals will be offered when necessary; the following are written procedures for referrals of disabled persons who cannot be served on-site.
    1) Referrals for deaf or hearing impaired clients:
        i. A deaf or hearing-impaired individual will be admitted to the program following the standard intake procedure to the best of the agency's ability.
        ii. Sign language interpretation will be offered as services are available or, if applicable, by the person accompanying the client.
        iii. Staff shall consult the appropriate services that are hearing impaired accessible and present options to clients.

iv. Staff will initiate the referral process, providing assistance in accessing referred services as well as follow-up to help ensure needs are met.
v. In special cases involving domestic violence and the deaf and hearing-impaired, staff shall work with Adult Protective Services through the Department of Human Services in order to offer assistance to the client.

2) Referrals for physically and/or mentally handicapped clients:
   i. A physically and/or mentally handicapped individual would be admitted to the program following the standard intake procedure to the best of the agency's ability.
   ii. Staff shall consult the appropriate services that are handicapped accessible and present options to clients.
   iii. Staff will initiate the referral process, providing assistance in accessing referred services as well as follow-up to help ensure needs are met.
   iv. In special cases involving domestic violence and the physically and/or mentally handicapped, staff shall work with Adult Protective Services through the Department of Human Services in order to offer assistance to the client.
3) Referrals for blind or visually impaired clients:
   i. A blind or visually impaired individual will be admitted to the program following the standard intake procedure to the best of the agency's ability.
   ii. The agency will provide large print materials to clients who may be visually impaired.
   iii. Staff shall consult the appropriate services that are visually impaired accessible and present options to clients.
   iv. Staff will initiate the referral process, providing assistance in accessing referred services as well as follow-up to help ensure needs are met.
   v. In special cases involving domestic violence and the blind or visually impaired, staff shall work with Adult Protective Services through the Department of Human Services in order to offer assistance to the client.

LIFT CAA Victim Services Programs will maintain current service agreements (to be renewed every three years) with available community services to offer access to a continuum of needed services for clients with special needs. If unable to establish a current service agreement with all appropriate resources in the community, efforts to do so or reasons/ opinions why this is not or cannot be done will be documented. The programs will utilize existing Resource Guides as well as other available local, area, or state information to facilitate referrals for clients.

c. Service and companion animals should be allowed in facilities unless the animal poses a direct threat to the health/safety of others.
d. Auxiliary aids/services should be offered as necessary to ensure effective communication unless doing so would cause an undue burden (i.e., significant difficulty or expense) or fundamental alteration in services.
e. Alterations to existing buildings must be accessible to the maximum extent feasible. All newly constructed facilities must be accessible to persons with disabilities unless it is structurally impractical.

XV. PROGRAM ENVIRONMENT

The program environment shall meet the following conditions:

a. LIFT CAA's facilities shall have heating and air conditioning equipment adequate to maintain the temperature in areas utilized by clients at between 65ºF and 85ºF.
b. Smoking shall not be allowed in any indoor portion of any facility.
c. LIFT CAA's facilities shall have adequate space in which to carry out the Victim Services Programs' goals and objectives, including outdoor areas and equipment when appropriate.
d. Toxic materials and dangerous substances, such as toxic cleaners, insecticides, and matches shall be stored in a non-client area, locked space where they are not accessible to children.
e. Combustible materials shall be stored in locked non-flammable containers.
f. The Poison Control Center's toll-free telephone number shall be posted and visible to staff and clients at all times.

XVI. ADMISSION CRITERIA

a. The only criterion for admission into LIFT CAA's Victim Services Programs is victimization. Appropriate referrals will be made. Exit criteria will be contingent on the survivor's need for services or lack of participation. The survivor is free to leave the program at any time.
b. The criterion for admission of a minor child is that the child is admitted to the program with the parent/guardian when either or both is in need of safety due to domestic violence, sexual assault or stalking.
c. Exclusion criteria are that the victim is violent and/or abusive to staff, volunteer, parent, or other clients.

XVII. PROGRAM MANAGEMENT, POLICY AND PROCEDURES

a. LIFT CAA shall maintain written policies and procedures that describe each program service component, the rules clients are expected to follow for each component, and staff or volunteer duties.
b. Clients shall be given a copy of program rules and the provision of such shall be documented in the client record.
c. The programs shall have a written policy of the intent to comply with the Americans with Disabilities Act of 1990.

XVIII. ANNUAL PROGRAM EVALUATION

a. LIFT CAA shall conduct an annual evaluation of its Victim Programs services, facilities, and policies and procedures. The evaluation shall include an assessment to identify special populations of victims who are underserved or have special needs (included on the Advocacy and Supportive Services Feedback form). This annual evaluation shall be carried out according to the following plan of evaluation:

1) Data to be reviewed shall include: the number of clients served, type of victimization, services provided, annual staff evaluations, and compilation/trending of responses to the Advocacy and Supportive Services Feedback form, surveys, and other programmatic information (such as reports submitted to funding sources, progress reporting, financial statements, etc.).
2) The Victim and Youth Programs Director will compile the data collected by staff. This evaluation data will be submitted to the Executive Director and Board of Directors for review and approval. Upon review and approval by the Board of Directors, the evaluation will be made available to staff and volunteers, who will be able to ask questions and address any concerns.

XIX. CRITICAL INCIDENTS

All staff and volunteers are required to provide documentation and report all critical incidents.

a. A Critical Incident is defined as one occurrence or set of events that is not consistent with the routine care of a client, the routine services provided by or operations of LIFT CAA, or the safety/security of the facility. Incidents include accidents, unusual occurrences, or situations that might result in injury to a person or damage the property or equipment. Incidents may involve clients, employees, visitors and other persons. An incident may involve multiple individuals and or results. Critical incidents which shall be reported include, but are not limited to: adverse drug events; self-destructive behavior; deaths and injuries to clients, staff, volunteers, and visitors; incidents involving medication; neglect or abuse of a client; fire; unauthorized disclosure of information; damage to or theft of property belonging to a client or the facility; other unexpected occurrences; or events potentially subject to litigation.
b. Each critical incident shall be recorded and monitored as follows:
    1) agency name;
    2) name and signature of the person(s) reporting the critical incident;
    3) Client ID(s) or staff member(s), volunteers and/ or property, involved in the critical incident;
    4) the date;
    5) time of the critical incident;
    6) physical location of the critical incident, if known;
    7) the name of the staff or volunteer the incident was reported to;
    8) a description of the incident;
    9) severity of each injury, if applicable, which shall be indicated as follows:
        i. no off-site medical care required or first aid care administered on-site;
        ii. medical care by a physician or nurse or follow-up attention required; or
        iii. hospitalization or immediate off-site medical attention was required.
    10) resolution or action taken, date action taken and signature of the agency director or authorized designee.
c. Critical incidents that shall be reported to the Office of the Attorney General are reported as follows:

1) Critical incidents requiring medical care by a physician or nurse or follow-up attention and incidents requiring hospitalization or immediate off-site medical attention shall be delivered via fax or mail, including electronic mail, to the Office of the Attorney General Victims Services within forty-eight (48) hours, or if the incident occurs on the weekend or holiday, the next business day of the incident being documented.
2) Incidents involving disaster at a facility, death or client abuse shall be reported to the Safeline at 1-800-522-7233 immediately via telephone. The notification shall be followed with a written report from the reporting agency within twenty-four (24) hours of the incident and delivered via fax or mail, including electronic mail, to the Office of the Attorney General Victims Services Unit.

XX. PERSONNEL POLICIES AND PROCEDURES

a. LIFT CAA has written policies and procedures governing the conditions of agency employment, to include appropriate screening and background inquiries to ensure client safety and confidentiality.
b. Prior to employment and at least annually, LIFT CAA shall conduct a name search of employees against the registries maintained pursuant to the Oklahoma Sex Offenders Registration Act and the Mary Rippy Violent Crime Offenders Registration Act.
c. LIFT CAA's policies and procedures shall be accessible to all personnel and each shall be informed of personnel policies and procedures, and any other materials regulating or governing the conditions of their employment. Staff will complete an attestation of receipt of the policies and procedures upon hire/beginning work within the Victim Services Programs, as well as any revisions to the policies and procedures that may occur.
d. Written policies and procedures shall ensure personnel are informed of any changes to these aforementioned materials.

XXI. NON-DISCRIMINATION

The agency's policies and procedures shall include provisions for non-discrimination with regard to the agency's relationship with personnel in accordance with applicable state and federal laws.

XXII. SELECTION OF PERSONNEL

The methods for selecting personnel shall be described in the policies and procedures manual, and shall include, but not be limited to:

a. The processes for recruitment, selection and appointment; and
b. Written criteria demonstrably related to the position being filled.

XXIII. JOB DESCRIPTIONS, PERSONNEL

LIFT CAA shall have written job descriptions for personnel defining the duties of, and minimum qualifications for, each position. Job descriptions will be reviewed and revised as appropriate.

XXIV. SUPERVISION OF PERSONNEL

LIFT CAA has established in writing lines of supervision for all personnel.

XXV. PERFORMANCE EVALUATION OF PERSONNEL

LIFT CAA shall have policies and procedures mandating the evaluation of personnel employment and service performance. These policies and procedures shall minimally include:

a. performance evaluations shall be completed at least annually, to include an evaluation of the Executive Director;
b. define the reason(s) for any evaluation other than annual;
c. performance evaluations shall be in writing and based on the staff's or volunteer's job description;
d. each evaluation shall be individually discussed with the staff or volunteers ;
e. personnel shall have a documented opportunity to respond, in writing, to each of their individual performance evaluations;
f. both staff or volunteer and supervisor shall sign and date the performance evaluation; however, the evaluation document shall state the staff's or volunteer's signature does not necessarily constitute agreement with the evaluation content.

XXVI. VOLUNTEER POLICIES AND PROCEDURE

a. LIFT CAA shall have written policies and procedures governing volunteer utilization to include appropriate screening and background inquiries to ensure client safety and confidentiality. The agency's policies and procedures will be accessible to all personnel and each shall be informed of such, and any other materials regulating or governing the conditions of their volunteer service. There are no specific criteria such as related experience or education required to become a volunteer; the programs accept all concerned citizens who would like to be of service in their community. To be accepted into the program(s) and prior to providing services, volunteers must first undergo a thorough screening process consisting of an intensive interview and comprehensive background check through the Oklahoma State Bureau of Investigation and AmericanChecked – which includes a check for any traffic violations, social security number verification, criminal offenses nationwide, sexual offenders list, and warrants for arrest. The interview process begins with a brief overview of the program such as program goals, expectations, and volunteer responsibilities. Volunteers who pass the screening process must then complete mandatory pre-service training.
b. LIFT CAA's policies and procedures shall include provisions for non-discrimination with regard to the agency's relationship with volunteers in accordance with applicable state and federal laws. All personnel shall have access to the Policies and Procedures and be informed of any changes. It is the policy of LIFT Community Action Agency, Inc. that no volunteer shall on the basis of race, color, national origin, religion, sex (including pregnancy and sexual harassment), age (40 or older), disability, political affiliation, protected veteran status, genetic information and testing, sexual orientation, gender identity, Family Medical Leave, participation in protected activity, or

any other characteristic protected by law, be excluded from participation in or be denied the benefits of, or otherwise be subjected to discrimination under any program or activity which the agency operates or is applying for funding. The agency shall recruit volunteers who are representative of the diversity in the local community and clients served.

c. Volunteers shall be utilized to offer direct or indirect services. The program shall ensure each volunteer has the knowledge appropriate to the volunteer's job duties and is appropriately supervised.
d. The programs shall maintain record(s) for each volunteer selected and utilized. Documentation will minimally include:
    1. Duty or work assignment;
    2. Record of hours worked or hours of service performed;
    3. Record of participation in training; and
    4. Emergency notification information.

XXVII. SUPERVISION OF VOLUNTEERS

a. LIFT CAA shall have in writing lines of supervision for all volunteers.
b. LIFT CAA shall ensure each volunteer has the knowledge appropriate to the volunteers' job duties and is appropriately supervised.

XXVIII. ORIENTATION – GENERAL, PERSONNEL AND VOLUNTEERS

a. LIFT CAA Victim Services Programs shall provide a minimum of thirty (30) hours orientation training that incorporates the use of adult learning techniques, (i.e., scenarios, role playing, shadowing) to familiarize new personnel and volunteers providing direct services with the program which includes, but is not limited to:
    1) Program goals and services of each service component;
    2) Program policies and procedures;
    3) Confidentiality, to include verbal confidentiality whether inside or outside the facility and client records;
    4) Facility safety and disaster plans;
    5) First aid kits and fire extinguishers, their location, contents and use;
    6) Universal precautions;
    7) Client rights;
    8) Domestic violence and its effects on victims and children;
    9) Power and control tactics of abuse;
    10) Dangerousness and lethality assessment including strangulation and head trauma;
    11) Crisis intervention techniques;
    12) Sexual assault;
    13) Stalking;
    14) Victim advocacy;
    15) Parenting and disciplinary techniques for children who have been exposed to domestic violence and trauma;

16) Active and empathetic listening techniques including hotline skills;
17) Accessing resources needed by victims and their families including how to ensure services and access resources for persons with special needs including cognitive disabilities or who are deaf or hard of hearing, non-English speaking persons, or undocumented immigrants to include basic information on U Visas and T Visas;
18) Safety planning for adults and age appropriate safety planning for children;
19) Basic child development;
20) Legal and ethical issues;
21) Cultural Sensitivity;
22) Effects of Trauma including posttraumatic stress disorder;
23) Victim's use of force; and
24) Documentation of services.

b. Staff and volunteers providing indirect services and children's activities are required to complete orientation as prescribed by the Executive Director and Victim and Youth Programs Director, which shall include training on confidentiality and facility safety and disaster plans.
c. Orientation for personnel must take place within thirty (30) days of employment or prior to unsupervised direct client contact and services.
d. Volunteer orientation must occur within six (6) months or prior to unsupervised, direct client contact and services. The Executive Director of a facility may waive orientation training if documented that the staff or volunteer has completed the requisite program training within the past year.
e. Program Directors shall attend New Director Orientation and training offered by the Oklahoma Office of the Attorney General, within the first six (6) months of employment.

XXIX. IN-SERVICE AND ONGOING TRAINING FOR PERSONNEL AND VOLUNTEERS

a. LIFT CAA shall mandate, at the minimum, sixteen (16) hours of annual training of all staff, to include:
    1) Confidentiality, to include verbal confidentiality whether inside or outside the facility and client records;
    2) Facility safety and disaster plans;
    3) First aid kits and fire extinguishers, their location, contents and use;
    4) Universal precautions;
    5) Client rights; and
    6) Legal and ethical issues.
b. The remaining hours of annual training shall be related to domestic violence, sexual assault, stalking, batterers intervention and administration as prescribed and approved by the Executive Director.
c. LIFT CAA shall mandate a minimum of four (4) hours annual training of all volunteers providing direct services, related to domestic violence, sexual assault, and stalking as prescribed and approved by the Executive Director.

d. Staff and volunteers who provide indirect services and do not meet the requirements for staff and volunteers providing direct services as defined in OAC 75:15-1-2 shall receive annual training as prescribed by the Executive Director, but do not have a minimum number of training hours required.
e. Documentation of training must include the topic of the training, the name of the trainer(s), the date of the training, the length of the training session, the sponsor of the training, and approval of the training by the Executive Director of the agency.
f. A Certified Domestic and Sexual Violence Response Professional in good standing with the Oklahoma Coalition Against Domestic Violence and Sexual Assault (OCADVSA) shall be deemed to be current with annual training requirements upon completion of required annual training set forth above under subsection (a). A copy of the current certification card issued by the OCADVSA shall be evidence of good standing.

XXX. PERSONNEL TRAINING, CHILDREN'S SERVICES

Prior to providing any direct services, children's services personnel shall receive the prescribed orientation training and minimally have one (1) year employment or volunteer experience in a child care or service related field, or an equivalent combination of education, training and experience in child care or development issues.

XXXI. PERSONNEL TRAINING, SEXUAL ASSAULT SERVICES

Prior to providing any direct services or CLEET training, all sexual assault services staff or volunteers shall receive a minimum of six (6) hours classroom training in addition to basic orientation which shall include but not be limited to:

1) Sexual abuse within the family (i.e., incest, sibling abuse, marital and domestic relationship rapes)
2) Sexual assault outside the family (i.e., stranger, non-stranger, abuse by professionals, sexual harassment and bullying)
3) Sexual assault within institutions (i.e., nursing homes, residential facilities, prisons, military)
4) Commercial sexual exploitation (i.e., prostitution, trafficking, pornography, escort services)
5) Non-traditional client populations (i.e., males, same sex, bisexual or transgender victims, non-English speaking, undocumented immigrants, victims with cognitive disabilities or who are deaf or hard of hearing)
6) Other topics to increase skills such as post-traumatic stress syndrome as it relates to rape trauma, rape trauma syndrome, self-injury and alcohol and drug use.

XXXII. PERSONNEL TRAINING, COURT ADVOCATES

Prior to providing services, Court Advocates shall receive the prescribed orientation training, and training in the following:

1) protective orders (i.e. the requirements for obtaining an ex-parte emergency protective order and permanent protective order and an understanding of what happens after a protective order is issued);
2) full faith and credit;
3) the court process, including safety planning during this time;
4) at least three (3) hours of accompanied court time with a trained court advocate that includes observation of an ex parte emergency protective order hearing and a final protective order hearing.

XXXIII. GOVERNING AUTHORITY, ORIENTATION

a. LIFT CAA shall provide a minimum of two (2) hours orientation training to members of the governing authority which includes, but is not limited to:
    1) Program goals and services of each service component;
    2) Program policies and procedures;
    3) Underlying philosophy [OAC 75:15-1-1.1];
    4) Confidentiality, to include verbal confidentiality whether inside or outside of the facility and client records;
    5) Client rights and grievance procedure;
    6) Legal and ethical issues;
    7) Overview of domestic violence, sexual assault and stalking;
    8) Open Meeting Act and recording of meeting minutes;
    9) Open Records Act;
    10) Rules, including standards and criteria, used in certifying to ensure multi-cultural needs of clients are met, used in certifying programs;
    11) Roles and responsibilities of the Executive Director; and
    12) Roles and responsibilities of the governing Board of Directors.
b. Orientation training shall take place within ninety (90) days of election to the governing Board.
c. Members of the governing Board providing volunteer direct or indirect services to clients shall receive the prescribed orientation and training required for program personnel in addition to the orientation set forth in this section.

XXXIV. CLIENT RIGHTS

a. Each client shall be afforded all constitutional and statutory rights of all citizens of the State of Oklahoma and the United States, unless abridged through due process of law by a court of competent jurisdiction. Each program shall ensure each client has the rights which are listed below:
    1) Each client has the right to be treated with respect and dignity. This shall be construed to protect and promote human dignity and respect for individual dignity.
    2) Each client has the right to a safe, sanitary, and humane living environment.
    3) Each client has the right to a humane psychological environment protecting the client from harm, abuse, and neglect.

4) Each client has the right to an environment that provides reasonable privacy, promotes personal dignity, and provides physical and emotional safety.
5) Each client has the right to receive services suited to the client's needs without regard to race, religion, gender, ethnic origin, age, degree of disability or legal status.
6) Each client, on admission, has the absolute right to communicate with a relative, friend, clergy, or attorney, by telephone or mail, at the expense of the program if the client is indigent.
7) Each client shall have and retain the right to confidential communication with an attorney, personal physician, or clergy.
8) Each client has the right to uncensored, private communications including, but not limited to, letters and telephone calls. Copies of any personal letter, sent or received, by a client shall not be kept in the client's record without the written consent of the client.
9) No client shall be neglected or sexually, physically, verbally, or otherwise abused.
10) Each client shall have the right to practice free exercise of religious beliefs, and be afforded the opportunity for religious worship that does not infringe on the health or safety of others. No client shall be coerced into engaging in, or refraining from, any personal religious activity, practice, or belief.
11) Each client has the right to be provided with prompt, competent, appropriate services and an individualized service plan.
    i. The client shall be afforded the opportunity to participate in the creation of the client's service plan.
    ii. The client may consent, or refuse to consent, to the proposed services.
12) The records of each client shall be treated as confidential. This confidentiality remains intact even after the client's death.
13) Each client has the right to refuse to participate in any research project or medical experiment without informed consent of the client, as defined by law. A refusal to participate shall not affect the services available to the client.
14) Each client has the right to assert grievances with respect to any alleged infringement of these stated rights of clients, or any other subsequently statutorily granted rights.
15) No client shall ever be retaliated against, or subject to, any adverse conditions or services solely or partially because of having asserted her or his rights as stated in this section.
16) Upon request, each client has the right to review and receive a copy of the client's own records or authorize an attorney or other person to do so. However, records regarding mental health or substance abuse treatment shall be released pursuant to the provisions of 43A O.S. § 1-109 and 42 CFR shall apply.
17) Each client has the right to know why services are refused and can expect an explanation concerning the reason why the client was refused particular services.
18) Each client has the right to voluntary services that are self-determined.
19) Each client has the right to decide whether or not to participate in supportive services offered by the program.

b. Each client shall be given a copy of these rights and the provision of such shall be documented in the client record.
c. Clients will sign an attestation of receipt with regards to the explanation of these rights, which are visibly posted in client areas of the facility.

XXXV. CLIENT GRIEVANCE POLICY AND PROCEDURES

a. LIFT CAA has a written client grievance policy providing for, but not limited to, the following:
    1) Written notice of the grievance and appeal procedure provided to the client; and, if involved with the client, to family members or significant others;
    2) Time frames for the grievance policy's procedures, which allow for an expedient resolution of client grievances;
        i. Non-transitional living and non-shelter services timeframes for resolution of grievances by program staff or volunteers shall be fourteen (14) days unless appealed;
    3) Name(s) of the individual(s) who are responsible for coordinating the grievance policy and the individual responsible for or authority to make decision(s) for resolution of the grievance. In the instance where the decision maker is the subject of a grievance, decision-making authority shall be delegated;
        i. The LIFT CAA Executive Director (Rebecca Reynolds) is responsible for coordinating the grievance policy. The Victim and Youth Programs Director (Doris Long) and/or the Executive Director are responsible for and have the authority to make decision(s) for the resolution of the grievance.
        ii. If the Victim and Youth Programs Director (Doris Long) is the subject of the grievance, decision-making authority will fall directly to the Executive Director (Rebecca Reynolds). If a grievance is raised against the Executive Director that cannot be resolved through the informal and formal action process with the Program Director, the grievance will be directed to the Chairman of LIFT CAA's Board of Directors (David Hawkins). The Board Chairman (with assistance as needed by the Board Personnel Committee) shall have the responsibility for hearing grievances on matters involving the Executive Director.
    4) Provide for notice to the client that he or she has a right to make a complaint to the Office of Attorney General's Victims Services Unit;
    5) Clients shall be given a copy of the grievance policy including the right to make a complaint to the OAG and the provision of such shall be documented in the client record including the phone number, mailing address, and email address of the Victims Services Unit of the Office of the Attorney General.
    6) Annual review of the grievance policy and procedures, with revisions as needed.
    7) The mechanism to monitor the grievance process and improve performance based on outcomes will consist of an internal feedback loop. The Victim and Youth Programs Director, who will be responsible for documenting all program grievances and steps taken during the process, will regularly report to the Executive Director, supervising Associate

Director, and Human Resources Director regarding all grievances reported. The Director will detail the circumstances concerning the grievance, process, and outcome (including staff and client input), facilitating discussion over improvements that could be made to garner more positive outcomes or even avoid the situation in the first place. These reports will be used to inform the annual review of the grievance policy and procedures, including whether revisions are needed.

LIFT COMMUNITY ACTION AGENCY, INC.
LIMITED ENGLISH PROFICIENCY PLAN/POLICY

LIFT Community Action Agency, Inc. (LIFT) will take reasonable steps to ensure that persons with Limited English Proficiency (LEP) have meaningful access and an equal opportunity to participate in our services, activities, programs and other benefits. The plan/policy of LIFT is to ensure meaningful communication with LEP clients and their authorized representatives. The plan/policy also provides for communication of information contained in documents and forms applicable to LIFT. All interpreters, translators and other aids needed to comply with this plan/policy shall be provided without cost to the person being served, and clients and their families will be informed of the availability of such assistance free of charge.

Language assistance will be provided through use of competent bilingual staff, interpreters, and arrangements with local organizations providing interpretation translation services, technology, or telephonic interpretation services. All staff will be provided notice of this plan/policy and procedure, and staff that may have direct contact with LEP individuals will be trained in effective communication techniques.

LIFT will conduct a regular review of the language access needs of our client population, as well as update and monitor the implementation of this plan/policy and its procedures, as necessary.

PROCEDURES:

1. IDENTIFYING LEP PERSONS AND THEIR LANGUAGE

LIFT will promptly identify the language and communication needs of the LEP person. If necessary, staff will use a language identification flyer (or "I speak…Language Identification Guide" available online at https://www.lep.gov/translation#toc-language-identification-and-i-speak-cards and on employee bulletin boards) to determine the language. In addition, when records are kept of past interactions with clients/residents or family members, the language used to communicate with the LEP person will be included as part of the record.

2. OBTAINING A QUALIFIED INTEPRETER

Dawn McDaniel, HR Director, 580-326-3351 will be responsible for:

(a) Assisting with locating translation services including technology;

Dawn McDaniel will secure assistance, if needed, in operating the online translation program in order to communicate with individuals who have limited English proficiency.

Dawn McDaniel
209 N. 4th St.
Hugo, Oklahoma 74743
580-326-3351

LIFT can also enlist the professional services of https://www.worldlingo.com/ for translation services after gaining approval from the LIFT Executive Director. The list of languages for translation are listed at http://translate.google.com/.

(b) Contacting the appropriate bilingual staff member to interpret, in the event that an interpreter is needed, if an employee who speaks the needed language is available and is qualified to interpret;

(c) Obtaining an outside interpreter if a bilingual staff or staff interpreter is not available or does not speak the needed language.

www.worldlingo.com may provide qualified interpreter services. The agency's services are available upon a case by case basis and will be determined by Dawn McDaniel, 209 N. 4th St., Hugo, Oklahoma, 580-326-3351, and approved by the Executive Director.

Some LEP persons may prefer or request to use a family member or friend as an interpreter. However, family members or friends of the LEP person will not be used as interpreters unless requested by that individual and **after** the LEP person has understood that an offer of an interpreter at no charge to the person has been made by the agency. Such an offer and the response will be documented in the person's file. If the LEP person chooses to use a family member or friend as an interpreter, issues of competency of interpretation, confidentiality, privacy, and conflict of interest will be considered. If the family member or friend is not competent or appropriate for any of these reasons, competent interpreter services will be provided to the LEP person.

3. PROVIDING WRITTEN TRANSLATIONS

(a) When translation of vital documents is needed, LIFT will submit those documents for translation to http://translate.google.com/. Original documents being submitted for translation will be in final form with updated and accurate information.

(b) Facilities will provide translation of other written materials, if needed, as well as written notice of the availability of translation, free of charge, for LEP individuals.

4. PROVIDING NOTICE TO LEP PERSONS

LIFT will inform LEP persons of the availability of language assistance, free of charge, by providing written notice in languages LEP persons will understand. This will be done by translating this document using http://translate.google.com/ as needed. At a minimum, notices/signs will be posted at main points of entry and on employee bulletin boards.

5. MONITORING LANGUAGE NEEDS AND IMPLEMENTATION

On an ongoing basis, LIFT will assess changes in demographics, types of services or other needs that may require reevaluation of this plan/policy and its procedures. In addition, LIFT will regularly assess the efficacy of these procedures, including but not limited to mechanisms for securing interpreter services, equipment used for the delivery of language assistance, complaints filed by LEP persons, feedback from community organizations, etc.

Confidentiality Agreement

In consideration of being employed by LIFT Community Action Agency, Inc., the undersigned hereby agrees and acknowledges:

1. That during the course of my employ there may be disclosed to me certain confidential information of the Agency, said confidential information consisting of :
   a. Technical Information: e.g. methods, processes, systems, formulas, lists, research data, computer programs, etc.
   b. Business Information: e.g. customer lists, pricing data, sources of supply and marketing production, or merchandising systems or plans, etc.
   c. Client Information and other related information.

2. I shall not during, or at any time after the termination of my employment with the Agency, use for myself or others, disclose or divulge to others, any confidential information, or any other data of the Agency in violation of this agreement.

3. That upon the termination of my employ from the Agency:
   a. I shall return to the Agency all documents relating to the Agency, including but not necessarily limited to: manuals, correspondence, customer lists, computer programs, ledgers, teaching materials and aids, books, magazines, videos, forms, files, handbooks, and all other materials and all copies therefor relating in any way to the Agency's business, or in any way obtained by me during the course of my employ. I further agree that I shall not retain any copies of the foregoing.
   b. The Agency may notify any future or prospective employer of the existence of this agreement.
   c. This agreement shall be binding upon me and my personal representatives and successors in interest, and shall inure to the benefit of the Agency, its successors and assigns.
   d. The unenforceability of any provision to this agreement shall not impair or affect any other provision.
   e. In the event of any breach of this agreement, the Agency shall have full rights to injunctive relief together with monetary damages in addition to any other existing rights, without requirement of posting bond.

All printed materials, written or produced for LIFT Community Action Agency, Inc. operational, educational, or marketing activities are considered confidential and may not be given to, used at, or sold to other individuals or companies.

Employee Signature	Employee Name	Date
Agency Representative	Name/Title	Date
Witness	Name	Date

LIFT Community Action Agency, Inc.
209 North 4th Street, Hugo, OK 74743
Telephone (580) 326-3351 Fax (580) 326-2305

SMOKE FREE AND TOBACCO FREE POLICY

PURPOSE/POLICY

To comply with applicable laws and provide a smoke-free and tobacco free working environment.

All working locations will be designated as non-smoking/tobacco free areas and signs will be posted to that effect.

The Agency provides a smoke-free and tobacco free workplace environment, and therefore smoking and tobacco of any kind is prohibited on its premises. This includes, but is not limited to, smokeless tobacco, chewing tobacco products, cigarettes, cigars, pipes, electronic cigarettes, personal vaporizers, and any other electronic nicotine delivery systems.

LIFT CAA DRUG AND ALCOHOL ABUSE POLICY/TESTING PROGRAM

Effective December 10, 2019

PURPOSE/POLICY

LIFT CAA is committed to being a drug-free workplace. All employees are absolutely prohibited from unlawfully manufacturing, selling, distributing, dispensing, receiving, transporting, possessing or using controlled substances (including medical marijuana) or alcohol in the workplace. Subject to the terms of this Program, it is a violation of the agency's policy to be under the influence of alcohol, unauthorized legal drugs, or illegal drugs, or to engage in the illegal use of other controlled substances while on duty, in the agency workplace, or at any other worksite to which an employee may be assigned. Additionally, the agency prohibits the possession and use of any substance (including medical marijuana), whether legal or illegal, prescription or over-the-counter, that impairs an employee's ability to perform his or her job in a safe manner.

This Program does not create a contract of employment. Employment with the agency remains "at will" and for no fixed period of time. As such, the employee may terminate his or her employment at any time and at his or her discretion. Likewise, the agency may terminate an employee's employment at any time and at its sole discretion, with or without notice or cause.

This Program applies to all contractors, employees and applicants for employment with the agency, including employees covered by Department of Transportation (DOT) testing program or any other testing program. Violations of any provision of this Program may result in disciplinary action, up to and including discharge. Compliance with the Program is a condition of continuing employment.

The agency reserves the right to change the provisions of this Program at any time, in accordance with the law.

DEFINITIONS

Agency property – means any agency workplace or any other worksite to which an employee may be assigned, including while in a vehicle.

Alcohol – means ethyl alcohol or ethanol.

Confirmation Test – means a drug or alcohol test of the original sample to substantiate the results of a prior drug or alcohol test on the same sample and which uses different chemical principles and is of equal or greater accuracy than the prior drug or alcohol test. Where a breathalyzer test is utilized, a confirmation test means a second sample test that confirms the prior result.

Drug – means amphetamines, cannabinoids, cocaine, phencyclidine ("PCP"), hallucinogens, methaqualone, opiates, barbiturates, benzodiazepines, synthetic narcotics, designer drugs, or a metabolite of any of the substances listed herein.

Medical Review Officer ("MRO") – means a qualified individual who is responsible for

receiving results from a testing facility which have been generated by the agency's drug or alcohol testing program, and who has knowledge and training to interpret and evaluate an individual's test results together with the individual's medical history and any other relevant information.

Prescribed Drug – means any substance prescribed for individual consumption by a licensed medical practitioner in compliance with both federal and state laws.

Program – means this Drug and Alcohol Policy and Testing Program adopted by the agency.

Safety-Sensitive - means any job that includes tasks or duties that could affect the safety and health of the employee performing the task or others including, but not limited to, any of the following:

a. the handling, packaging, processing, storage, disposal or transport of hazardous materials;

b. the operation of a motor vehicle, other vehicle, equipment, machinery or power tool;

c. repairing, maintaining or monitoring the performance or operation of any equipment, machinery or manufacturing process, the malfunction or disruption of which could result in injury or property damage;

d. the operation, maintenance or oversight of critical services and infrastructure including, but not limited to, electric, gas, and water utilities, power generation or distribution;

e. the extraction, compression, processing, manufacturing, handling, packaging, storage, disposal, treatment or transport of potentially volatile, flammable, combustible materials, elements, chemicals or any other highly regulated component;

f. carrying a firearm; or

g. direct child care.

TYPES OF TESTING

The agency believes that drug and alcohol testing is a means of enforcing this Program. Such testing is intended to protect the health and safety of employees, clients, program participants and the public at large and serve as a deterrent to the abuse of drugs and alcohol by the agency's employees. Applicants and employees may be required to submit to drug and/or alcohol testing in the following situations:

1. Pre-Employment and Transfer/Reassignment Testing – The agency may require an applicant to undergo drug or alcohol testing and may use a refusal to undergo testing or a failed test result as a basis for refusal to hire the applicant. The agency may also require an employee who transfers to a different position or job, or who is reassigned to a different position or job, to undergo drug or alcohol testing.

2. Employee Reasonable Suspicion Testing – The agency may require an employee to undergo drug or alcohol testing at any time it reasonably believes that the employee may

be under the influence of drugs or alcohol, including, but not limited to, the following circumstances: (a) drugs or alcohol on or about the employee's person or in the employee's vicinity; (b) conduct on the employee's part that suggests impairment or influence of drugs or alcohol; (c) a report of drug or alcohol use while at work or on duty; (d) information that an employee has tampered with drug or alcohol testing at any time; (e) negative performance patterns; or (f) excessive or unexplained absenteeism or tardiness.

3. Employee Post-Accident Testing – The agency may require an employee to undergo drug or alcohol testing if the employee or another person has sustained an injury while at work or property has been damaged while at work, including damage to equipment.

4. Employee Random Testing – The agency may require an employee or all members of an employment classification or group to undergo drug or alcohol testing at random and may limit its random testing programs to particular employment classifications or groups.

5. Employee Scheduled, Fitness-for-Duty, Return from Leave and Other Periodic Testing – The agency may require an employee to undergo drug or alcohol testing if the test is conducted as a routine part of a routinely scheduled employee fitness-for-duty medical examination, or in connection with an employee's return to duty from leave of absence.

6. Employee Post-Rehabilitation Testing – The agency may require an employee to undergo drug or alcohol testing for a period of time following an employee's return to work after a positive test, or following participation in a drug or alcohol dependency treatment program. This does not guarantee that an employee may be permitted to return to work following such positive test or participation in a program.

TESTING METHODS AND COLLECTION PROCEDURES

Alcohol Tests

Initial and confirmation alcohol tests may be performed using any type of sample from which a measurement of alcohol content in the person's body can be made, including without limitation, breath, saliva, blood, or urine samples. The collection of samples will be performed under reasonable and sanitary conditions, with due regard to the privacy of the individual being tested, and in a manner reasonable calculated to prevent substitutions or interference with the collection or testing of a reliable sample. The sample collection will be documented, including labeling of the sample to reasonably preclude the probability of erroneous identification of test results and an opportunity for the employee or prospective employee to provide notification of any information that the employee or prospective employee considers relevant to the test (including but not limited to identification of current or recently used prescription or nonprescription drugs or other relevant medical information).

Alcohol testing facilities will use internal chain of custody procedures to maintain control and accountability of specimens from receipt through completion of testing, reporting of results, during storage (if applicable), and continuing until final disposition of specimens. Sample collection, storage, and transportation to the place of testing shall be performed so as reasonably to preclude

the probability of sample contamination or adulteration.

All positive initial alcohol screening tests will be confirmed prior to any disciplinary action taken by the agency.

An employee or applicant whose confirmation alcohol test was conducted on breath analyzed by an evidential breath testing device (EBT) does not have the right to appeal a positive test result. An employee or applicant whose alcohol swab test was positive does not have the right to appeal a positive test result. An employee whose confirmation alcohol test was conducted by blood analyzed by gas chromatography has only the right to appeal a positive test result by requesting a re-test within two (2) hours of receiving notice of the failed test result in order to challenge the results of the failed test. The request must be made in a timely manner. The employee or applicant shall pay all costs of the re-test, unless it reverses the findings of the failed test. In such case, the agency will reimburse the individual for the costs of the re-test. The individual has no other right to appeal a failed alcohol test.

Drug Tests

After an employee or applicant has been identified for drug testing, samples of the tested individual's urine, hair, or saliva may be collected on agency property or at a designated collection site. The collection of samples will be performed under reasonable and sanitary conditions and with due regard to the privacy of the individual being tested. After the specimen is taken at the collection site for testing, it may be sent to a laboratory where it will be tested.

Collection and testing facilities will maintain a written record of the chain of custody of the sample from the time of the collection of the sample until the sample is no longer required.

An employee or applicant whose drug test result is positive has the right to request a confirmation test or re-test within twenty-four (24) hours of receiving notice of a positive test in order to challenge the results of a positive test. The employee or applicant shall pay all costs of the confirmation test or re-test, unless it reverses the findings of the challenged positive test. In such case, the agency will reimburse the individual for the costs of the confirmation test or re-test. The individual has no other right to appeal a positive drug test.

CONFIDENTIALITY OF TEST RESULTS

Records of all drug and alcohol test results and related information maintained by the agency shall be the property of the agency and, upon the request of the applicant or employee tested, will be made available for inspection and copying to the applicant or employee.

Records of all drug and alcohol test results and related information maintained by the agency may be released by the agency for any of the following purposes: (1) as admissible evidence by the agency or the individual tested in a case or proceeding before a court of record or administrative agency if either the agency or the individual tested is a named party in the case or proceeding; (2) in order to comply with a valid judicial or administrative order; or (3) to agency employees, agents, and representatives who need access to such records in the administration of the testing program.

Except in these specified circumstances, the agency will not release such records to any person other than the applicant, employee, or the MRO.

Neither the testing facility (including any agent, representative, or designee of the testing facility) nor the MRO shall disclose to the agency, based on the analysis of a sample collected from an applicant or employee for the purpose of testing for the presence of drugs or alcohol, any information relating to the general health, pregnancy, or other physical or mental condition of the applicant or employee.

Nothing in this Program shall preclude the agency from sharing drug or alcohol testing results of temporary employees or applicants for temporary employment with the temporary agency.

SEARCHES AND INSPECTION

For the purpose of assuring compliance with this Program and other agency policies, employees may be asked to submit to a search of any vehicle brought onto agency property (whether locked or unlocked), to submit to a search of any packet, package, purse, briefcase, lunch box, or other container brought onto agency property, or to submit to a search of desk, file, briefcase, locker, or other container provided by the agency – even if such briefcase, desk, locker or other container is locked. Refusal to consent to a search or inspection may result in disciplinary action, up to and including discharge.

PROHIBITED ACTIVITIES AND DISCIPLINARY ACTION

As part of this Program, the following activities are prohibited. Applicants will normally not be hired and employees will normally be subject to disciplinary action, up to and including discharge, for any violation of this Program, including, but not limited to, the following reasons:

Impairment – Being under the influence of any substance (including medical marijuana), alcohol, or illegal drugs, that impair the employee's sight, hearing, balance, reaction, reflex, or judgment while on agency property or while performing agency business is prohibited and may result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation.

Use and Possession – The use, sale, possession, transfer, or purchase of drugs (including medical marijuana) or alcohol on agency property or while performing any agency business is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. The agency prohibits the use, sale, possession, transfer, or purchase of any substance (including medical marijuana) that may impair an employee or cause the employee to be a safety risk. However, the proper and appropriate use of legal drugs by the appropriate person and in the appropriate method is not prohibited.

Prescription Drugs – Bringing a prescribed drug onto agency property by any person other than the one for whom it is prescribed is prohibited and may result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of

unemployment compensation. Prescription drugs may be used only in the manner, combination, and quantity prescribed. The employee, however, must not be impaired or be a safety risk while taking prescription drugs.

Marijuana - Although marijuana may be permitted by some states, including Oklahoma, for "medical" or "recreational" purposes, the agency is a federal contractor/federal grant recipient that is subject to the federal Drug-Free Workplace Act and, therefore, necessarily prohibits the use of marijuana, an illegal drug under federal law, by employees and prospective employees for any reason. In the event that the agency were to have a program or programs which were not subject to the federal Drug-Free Workplace Act or other similar federal restrictions, the agency will comply with applicable Oklahoma state laws and will not discriminate against employees who possess a valid medical marijuana license, except those employed in Safety-Sensitive positions or as otherwise provided by applicable laws.

Positive Test – An employee who tests positive for alcohol, illegal drugs, or illegally used chemicals will normally be subject to disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. An applicant whose drug or alcohol test result is positive may be refused employment.

Refusal To Undergo Testing – Refusing to undergo drug or alcohol testing is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge may be considered misconduct for purposes of unemployment compensation. An applicant who refuses to submit to a drug or alcohol test may be refused employment. Adulteration of a specimen or of a drug or alcohol test is considered a refusal to test.

Refusal To Consent To Testing – Refusing to execute any consent, release, or other document in connection with this Program is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. An applicant who refuses to execute any consent, release, or other document in connection with this Program may be refused employment.

Refusal To Consent To Search – Refusing to consent to a search or inspection conducted pursuant to the provisions of this or other agency policies is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation.

Tampering – In the event that it is determined that a sample has been diluted or otherwise tampered with, the employee may be, depending upon the circumstances, subject to disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. In the event that it is determined that an applicant's sample has been diluted or otherwise tampered with, the applicant may be refused employment.

RETURN TO WORK

Employees who are permitted to return to work after testing positive for drugs or alcohol, participating in a drug or alcohol treatment program, or violating any other provision of this Program will be required to execute a Return to Work Agreement. However, nothing in this

Program shall be construed to require the agency to allow an employee to return to work who has violated this Program. This Return to Work Agreement will include, among other items, a treatment program, an agreement to unannounced screening for substance abuse, and a statement of expected behavior.

LEGAL DRUGS

It will be considered an illegal drug and against agency policy to use prescription drugs other than in the manner, combination, and quantity prescribed or by any person other than the one for whom they are prescribed, or to use over-the-counter drugs other than in the manner, combination, and quantity as directed on the packaging.

The agency prohibits the possession and use of any substance, whether legal or illegal, prescription or over-the-counter, that impairs an employee's ability to perform his or her job in a safe manner. Employees adversely affected by their use of any legally obtained drug (prescription or over-the-counter) may not be allowed to perform their regular job in such a condition. Employees who are unable to work safely due to impairment resulting from legal drugs may be suspended without pay until the impaired condition has passed if the employee is unable to be temporarily transferred to another job until the impaired condition has passed.

LIFT CAA
Policy for Response to Workplace Related Incidents of Sexual Misconduct, Domestic Violence, and Dating Violence
(This policy applies to OVW funded staff.)

I. Purpose

LIFT CAA institutes this policy as part of its commitment to a safer and more supportive organizational climate and to the prevention and reduction of the incidence and effects of domestic violence, sexual violence, and stalking [hereinafter "violence"] at the workplace. LIFT CAA recognizes violence presents unique issues for its employees, volunteers, consultants, and contractors [hereinafter "employees"]. Violence can be workplace-related even if incidents occur elsewhere. It crosses economic, educational, cultural, age, gender, racial, and religious lines and occurs in a wide variety of contexts.

The purposes and goals of this policy are to:

- Support a comprehensive workplace education and training program to prevent violence and promote healthy relationships for employees and their families;
- Institutionalize responsive policies and procedures to assist and support employees who are impacted by violence;
- Create a supportive and healthful work environment that helps employees to avoid the use of violence in any context.

II. Definitions

- "Domestic violence" is a pattern of coercive behavior, including acts or threatened acts, that is used by a perpetrator to gain power and control over a current or former spouse, family member, intimate partner, or person with whom the perpetrator shares a child in common. Domestic violence includes, but is not limited to: physical violence, injury, or intimidation; sexual violence or abuse; emotional and/or psychological intimidation; verbal abuse; threats; harassment; stalking; or economic abuse and control.
- "Sexual violence" is a range of behaviors, including but not limited to: sexual harassment; a completed nonconsensual sex act (i.e. rape); an attempted nonconsensual sex act; abusive sexual contact (i.e. unwanted touching); and non-contact sexual abuse (e.g. threatened sexual violence, exhibitionism, verbal harassment). Some or all of these acts may also be addressed in LIFT CAA's Harassment Policy. Sexual violence is any sexual act or behavior that is perpetrated against someone's will when someone does not or cannot consent. Survivors of sexual violence may know the perpetrator(s), such as a coworker or a supervisor, and/or may be involved in a dating or marital relationship with the perpetrator, or the perpetrator may be unknown to the survivor. Consent is not given when a perpetrator uses force, harassment, threat of force, threat of adverse personnel action, coercion, or when the survivor is asleep, incapacitated, or unconscious.
- "Stalking" refers to harassing, intimidating or threatening conduct that causes the survivor to fear for his or her safety or the safety of a family member, or would cause a reasonable person in a similar situation to fear for his or her safety. Stalking conduct includes, but is not limited to: following or spying on a person; appearing at a person's home or work;

engaging in unwanted, harassing, or threatening phone calling, emailing, texting, etc.; waiting at places in order to make unwanted contact with the survivor or to monitor the survivor; leaving unwanted items, presents, or flowers for the survivor; and posting information or spreading rumors about the survivor on the internet, in a public place, or by word of mouth. Stalking may occur through use of technology including, but not limited to: email; voicemail; text messaging; and use of GPS and social networking sites.

- "Survivor" or "victim" is an individual who is currently subject to, or has in the past been subjected to, domestic violence, sexual violence, stalking or other forms of violence.
- "Perpetrator" is an individual who commits or threatens to commit an act of domestic violence, sexual violence, or stalking, including unwarranted violence against animals.
- "Protection or restraining order" allows a survivor to petition the court for protection from a perpetrator, as well as establish custody and visitation guidelines and provide for other forms of support, like rent or mortgage payments, which last for the duration of the order. Protection orders may also be issued in criminal cases as a condition of probation or condition of release particularly in a domestic violence, sexual violence, dating violence, or stalking related crime. In addition, some states have enacted laws that allow employers to apply for protection orders to prevent violent, harassment, or stalking of their employees.
- "Workplace-related incidents" of domestic violence, sexual violence, dating violence and stalking include acts, attempted acts, or threatened acts by or against employees, the families of employees, and/or their property, that imperil the safety or well-being of any person associated with an employee of LIFT CAA, regardless of whether the act occurred in or outside the organization's physical workplace. An employee is considered to be in the workplace while in, or using the resources of LIFT C.A.A's offices or facilities, using its equipment or vehicles, engaging in approved telework, on work-related travel, or otherwise conducting business on behalf of LIFT CAA. The availability and nature of the response to a work-lace-related incident may depend on the location at issue.
- "Workplace Safety Plan" is a strategy developed in collaboration with a victim and victim service provider to implement workplace safety options.

III. Persons Covered by this Policy

Persons covered by this policy include full, part-time or temporary employees funded by OVW, interns, contractors, consultants, or volunteers engaged by LIFT CAA's Safe Place Healing Hearts Program in any workplace location as defined above.

IV. Statement of Confidentiality

LIFT CAA recognizes and respects an employee's right to privacy and the need for confidentiality and autonomy. LIFT CAA shall maintain the confidentiality of an employee's disclosure regarding violence to the extent allowed by law, and unless to do so would result in physical harm to any person, and/or jeopardize safety within the workplace. When information must be disclosed to protect the safety of individuals within the workplace, LIFT CAA shall limit the breadth and content of such disclosure to information reasonably necessary to protect the safety of the disclosing employee and others, and to comply with the law. LIFT CAA shall provide advance notice to the employee who disclosed information, to the extent possible, if the disclosure must be shared with other parties in order to maintain safety in the workplace or elsewhere. LIFT CAA

shall also provide the employee with the name and title of the person whom LIFT CAA intends to share the employee's statements, and shall explain the necessity and purpose regarding said disclosure.

When information must be disclosed to protect the safety of individuals within any location or event controlled by LIFT CAA, LIFT CAA shall limit the breadth and content of such disclosure to information reasonably necessary to protect the safety of the disclosing employees and others, and to comply with the law. LIFT CAA shall provide advance notice to the employee who disclosed information, to the extent possible, if the disclosure must be shared with other parties in order to maintain safety in any location or event controlled by LIFT CAA or elsewhere.

LIFT CAA shall also provide the employee with the name and title of the person to whom LIFT CAA intends to share the employee's statements, and shall explain the necessity and purpose regarding said disclosure.

V. LIFT CAA Responses to Violence

A. Responses to Victims

i. Non-Discrimination and Non-Retaliation

LIFT CAA will not discharge or in any manner discriminate or retaliate against an employee because of the employee's status as a victim of domestic violence, sexual violence, or stalking, if the victim provides notice to the organization of the status, or the organization has actual knowledge of the status.

LIFT CAA will not retaliate against a victim of domestic violence, sexual assault, or stalking for requesting leave or a reasonable accommodation (see Section V(A)(ii)), regardless of whether the request was granted.

ii. Leave and Other Reasonable Accommodations and Assistance

LIFT CAA recognizes that victims of domestic violence, sexual assault, stalking and dating violence may need time off to obtain or attempt to obtain a protection or restraining order or any other legal assistance to help ensure his or her health, safety, or welfare or that of his or her child.

An employee must provide reasonable advance notice to LIFT CAA of the need to take time off unless advance notice is not feasible. LIFT CAA may require the employee to provide documentation or other certification verifying that the employee was a victim of violence. To request leave, employee should contact their supervisor.

LIFT CAA will maintain the confidentiality of a person who requests leave under this policy, to the extent allowed by law.

iii. Work Performance

LIFT CAA recognizes that employees who are victims of violence may experience temporary difficulty fulfilling job responsibilities. If LIFT CAA becomes aware that an employee's work performance or conduct has been impacted by domestic violence, sexual assault, or stalking, LIFT CAA will offer support to the employee and work in collaboration with the employee to address the issues, in accordance with established policies within the workplace. LIFT CAA may develop a work plan with employee, provide referrals to support or advocacy agencies, and maintain a separate and confidential record of employee's status as a victim of domestic violence, sexual assault and stalking to ensure to victim that his or her rights and privileges of employment are not impacted or compromised as a result of the violence.

iv. Protection and Restraining Orders

LIFT CAA recognizes that a victim of violence may seek an order of protection, or may receive a protection or restraining order, as part of his or her efforts to become safe and as part of his or her workplace safety plan. LIFT CAA recognizes that the workplace may or may not be included on an order as a location from which a perpetrator must remain away. If an employee chooses to disclose the existence of a protection or restraining order to LIFT CAA, LIFT CAA may, wherever possible, assist the employee to enforce his or her order, shall archive said order in a confidential and separate file from employee's personnel file, and, if applicable, may assist employee to gather documentation from the workplace, such as emails or voice messages, that could support the employee's efforts in the justice system or otherwise to obtain or maintain safety from a perpetrator.

B. Reporting by Employees with Information About Violence

Employees who have information about or witness an act of violence perpetrated by another employee, or who have information about or witness violence against an employee, are encouraged to report all information to the Human Resource Director.

LIFT CAA will not retaliate against, terminate, or discipline any employee for reporting information about alleged incidents of violence, as defined in this policy that may have been committed by any other employee, including a member of management. Prohibited acts of retaliation include, but are not limited to, demotion or withholding of earned pay, as well as acts of personal retaliation, such as those related to an employee's immigration status or sexual orientation, for example.

An employee who believes he or she has been subjected to adverse action as a result of making a report pursuant to this policy should contact the Human Resource Director.

C. Responses to Employees Who Commit Violence

If LIFT CAA receives information that alleges or suggests that an employee has committed an incident of workplace-related violence, as defined in this Policy, or if any manager receives information that any employee has engaged in any incident of workplace related violence, then the matter shall be referred to the Human Resource Director for the purpose of investigating the information or allegation.

LIFT CAA shall conduct an immediate investigation of the information or allegation, which investigation shall be completed within 45 days of receipt of the information or allegation concerning the alleged incident of violence.

Every employee shall have a duty to cooperate with the investigation, and failure to do so will result in disciplinary action being taken against the uncooperative employee up to and including termination. Additionally, every employee has the duty to be truthful and must disclose all information known to the employee when requested to do so by any person designated by LIFT CAA to investigate an alleged incident of violence. Any employee who fails to be completely truthful or who withholds information shall be subject to disciplinary action up to and including termination.

At the conclusion of the investigation conducted by LIFT CAA, the investigator shall report their findings to the Executive Director. If the investigator concludes, by a preponderance of the evidence, that the employee has engaged in a workplace-related incident, as defined in this Policy, then that employee shall be subject to disciplinary action up to and including termination. Employees are prohibited from utilizing any workplace resources, such as work times, phones, email, computers, fax machines or other means to threaten, harass, intimidate, embarrass or otherwise harm another person.

An employee who is subject to a protection or restraining order, or a named defendant in a criminal action as a result of a threat or act of domestic violence, sexual violence, or stalking must notify the LIFT CAA Human Resources Department immediately regarding the existence of such criminal or civil action. Failure to disclose the existence of such criminal or civil actions in these circumstances will result in disciplinary action, up to and including termination from employment.

VI. Reporting by Employees Who Are Victims

Employees who are victims of domestic violence, sexual assault, and stalking, and employees who are concerned about coworkers who might be victims, are encouraged to provide a report to LIFT CAA. LIFT CAA has designated the Human Resource Director as the person to whom such reports should be made. LIFT CAA's designated employee shall provide community referrals and resources to employees in order to assist employees with concerns or experiences regarding violence.

VII. Reporting Violation of Policy

A person who wishes to report a violation of this policy should contact the Human Resource Director. LIFT CAA will not subject employees who report violence or report a violation of this policy to work-related or personal retaliation as described in Section V(B). Any allegations of violations of this policy will be immediately investigated in accordance with the timeline and procedure outlined in Section V(C).

LIFT Community Action Agency

Personally Identifiable Information or Confidentiality Breach Response Policy

In the course of conducting routine operations, LIFT Community Action Agency's Victim Services Programs may create, collect, use, process, store, maintain, disseminate, disclose, or dispose of Personally Identifiable Information (PII). This can include PII (stored electronically or in paper files) on individuals, including victims served, their families, their placement providers, Board Members, employees, and other people the agency/programs have a relationship with or may need to contact in the course of serving clients or conducting work. As defined in 2 CFR § 200.79, PII is information that can be used to distinguish or trace an individual's identity, either alone or when combined with other information that is linked or linkable to a specific individual.

The Victims Services Programs have Confidentiality Policies and Procedures to safeguard such information. The programs comply with all applicable laws, and PII collected is used fairly, stored safely, and not disclosed unlawfully. PII shall be limited to personnel who need access to conduct program work; appropriate security is in place to avoid unauthorized sharing of information. While such an event is unlikely, the Victim Services Programs have in place procedures to prepare for and respond to a breach of confidentiality or PII (actual or imminent), which are set forth in this policy.

In the event of an actual or imminent breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorized disclosure of, or access to PII, the Victim Services Program Director and Program Staff shall promptly assess the risk to people's rights/freedoms and develop a mechanism to report the breach to the impacted victim(s) as well as reporting to the awarding agency (District Attorneys Council, Office on Violence Against Women, and Oklahoma CASA Association) no later than 12 hours after the occurrence. The Program Director (with the assistance of program staff, as needed) will work with the awarding agency (District Attorneys Council, Office on Violence Against Women, and Oklahoma CASA Association) to properly de-escalate, refer, and respond to the situation. As part of this reporting process, the Victim Services Programs Director will complete and submit the "Breach of Personally Identifiable Information (PII) Report" to the District Attorney's Council no later than 12 hours after an occurrence of an actual breach or detection of an imminent breach.

The Victim Services Director shall take responsibility for ongoing compliance, in consultation with executive leadership of LIFT Community Action Agency. The policy will be reviewed at least annually to ensure data protection standards are being met and the programs/policy complies with all applicable laws, along with any requirements set forth by funding agencies. The Victim Services Director will provide training as needed to all program employees to better understanding of their responsibilities when handling sensitive data and PII.

Rules – Victim Services Programs
LIFT Community Action Agency, Inc.

The following are prohibited activities and will be considered a breach of the standards of conduct, leading to discharge from LIFT CAA's Victim Services Programs:

1. The use of alcohol, illegal drugs, or the abuse of non-prescription and/or prescription drugs by clients and staff on the premises of any agency facility or function;
2. Smoking and tobacco use of any kind on the premises of agency facilities (includes, but is not limited to, smokeless tobacco, chewing tobacco products, cigarettes, cigars, pipes, electronic cigarettes, personal vaporizers, and any other electronic nicotine delivery systems);
3. Physical violence and other abuse between staff and/or clients, including physical discipline/punishment of children. All real and suspected child abuse will be reported to the Department of Human Services' Child Welfare Unit or other appropriate authority;
4. Disorderly conduct or any act which may endanger the safety or well-being of others and/or the agency;
5. Threatening, intimidating, coercing, harassing (in any form), using abusive or vulgar language, or interfering with clients or the performance of employees;
6. Unauthorized possession of agency, employee or client property, gambling, carrying weapons or explosives, or violating criminal laws on agency premises;
7. Engaging in acts of dishonesty, fraud, theft or sabotage, including damaging or destroying agency property through careless or willful acts;
8. Violating confidentiality of clients, staff or volunteers;
9. Falsifying an application for services or any other agency documents or records;
10. Willfully destroying or deleting any files and agency records;
11. Willfully disregarding or violating any agency policy, procedure, or rule; and
12. Engaging in such other practices as may be determined to be inconsistent with the ordinary and reasonable rules of conduct necessary to the welfare of the agency, its employees or clients.

LIFT CASA Program Goals

Goal #1: To increase the capacity of qualified, trained, dependable staff to manage growth, maintain program quality, and support program volunteers and cases.

Goal #2: To educate the community on their responsibility to abused and neglected children, as well as enhance recruitment efforts to gain additional new volunteers and increase program diversity.

Goal #3: To increase the total number of CASA volunteers available for court appointment to deprived cases.

Goal #4: Provide volunteer support to achieve high retention rates of volunteers.

Goal #5: To increase the number of cases served by a CASA volunteer.

Goal #6: To improve overall program capacity to appropriately respond to the needs of abused and neglected children within Choctaw, McCurtain, and Pushmataha Counties.

Victim Advocacy Services Program Goals

Goal #1: To enhance and more efficiently deliver appropriate services to crime victims and their families in Choctaw, McCurtain, and Pushmataha Counties, in order to meet their emotional/mental health and physical needs, as well as ensure victim safety and security.

Goal #2: To raise victim, Provider, and community awareness of crime victims' services, rights, and resources available in Choctaw, McCurtain, and Pushmataha Counties.

Goal #3: To enhance collaboration and accountability among victim service providers within Choctaw, McCurtain, and Pushmataha Counties.

Safe Place Healing Hearts Program Goals

The overall aim of the Safe Place Healing Hearts Program will be to enhance the safety of rural victims of sexual assault, domestic violence, dating violence, and stalking. To accomplish this, the project will work towards the goal of expanding and more efficiently delivering appropriate services to victims of sexual assault, domestic violence, dating violence, and stalking in Choctaw, McCurtain, and Pushmataha Counties, in order to meet their emotional and physical needs, as well as ensure victim safety and security. Secondly, the project will work towards the goal of enhancing collaboration between and building the capacity of service providers in the target rural communities to appropriately respond to, improve the rate of prosecution, coordinate service delivery, and assist victims in cases of domestic violence, dating violence, sexual assault, and stalking.

Safe Place Healing Hearts Too Program Goals

The overall aim of Safe Place Healing Hearts Too will be to support comprehensive, community-based efforts to address the needs of children impacted by domestic violence, dating violence, sexual assault, and stalking in southeast Oklahoma. To accomplish this, the project will work towards the goal of developing, expanding and strengthening prevention strategies, intervention services and treatment targeting children ages 0-10 years who are victims of and/or exposed to domestic violence, dating violence, sexual assault, and stalking in Choctaw, McCurtain, and Pushmataha Counties. The project will work towards another goal of supporting a coordinated community response, by enhancing collaboration between and building the capacity of service providers in the target counties to appropriately respond to and assist child victims or those exposed to domestic violence, dating violence, sexual assault, and stalking.

WE will HELP YOU find SAFETY.



Services are provided with fairness and respect for the victim's dignity and privacy.

Services provided to residents of Choctaw, Pushmataha and McCurtain counties

DeeDee Atwood
Victim Services Coordinator
Lift Community Action Agency,Inc.
Dianna.Atwood@liftca.org
580-298-2921
24 HOUR HELP CALL OR TEXT
580-317-3905
580-372-0806 or
580-372-0816

This institution is an equal opportunity provider and employer

LIFT VICTIM ADVOCACY SERVICES

CONTACT:
DeeDee Atwood
Lift CAA
603 S. W. B Street
Antlers, OK 74523
580-298-2921
Dianna.Atwood@liftca.org

24 HOUR HELP
CALL OR TEXT
580-317-3905
580-372-0806 or
580-372-0816

The Promise of Community Action

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

Lift Community Action Agency

"This project is supported by VOCA Grant # 2021-VO-CA-Little Dixie CAA-101 awarded by the US Department of Justice through the Oklahoma District Attorneys Council."

Know Your Rights
&
SEEK HELP



LIFT VICTIM ADVOCACY SERVICES

CONTACT:
DeeDee Atwood
Victim Services Coordinator
580-298-2921

24 HOUR HELP CALL OR TEXT

580-317-3905

580-372-0806 or 580-372-0816



Notice of Rights

WHO IS ELIGIBLE?

Victims of any crime which include but are not limited to:

- Child physical abuse and neglect
- Elder abuse/neglect
- Sexual abuse
- Domestic and or family violence
- Arson
- Bullying
- Stalking
- Burglary
- Homicide
- Identity theft
- Court order violation

Services provided: Emergency services to victims such as resources, food, clothing and shelter, community outreach, victim advocacy, safety plans, court system advocacy, accompaniment to hospitals for medical examinations.

1. The right to request that charges be pressed against your assailant.
2. The right to request protection from any harm or threat of harm arising out of cooperation with law enforcement and prosecution efforts and to be provided with information on the level of protection available.
3. The right to be informed of financial assistance and other social services available, including information on how to apply for the assistance and services.
4. The right to file a petition for a protective order or, when the court is not open for business, an emergency temporary protective order.

LIFT Victim Advocacy Services

"This project is supported by VOCA Grant # 2021-VO-CA-Little Dixie CAA-101 awarded by the US Department of Justice through the Oklahoma District Attorneys Council."

Victim Services Coordinator duties:

- Respond to the emotional and physical needs of crime victims
- Assist primary and secondary victims of crime to stabilize their lives after victimization
- Assist victims to understand and participate in the criminal justice system
- Provide the victims of crime a measure of safety and security
- Assistance with Victim Compensation Claim Forms and Victim Restitution Recovery Forms.



Lift Community

Action Agency, Inc.

Safe Place Healing Hearts Program

Office Locations:

Pushmataha County

603 S.W. "B" Street

Antlers, Ok. 74523

580-298-2921

Choctaw County

500 E. Rosewood

Hugo, Ok. 74743

580-326-5201

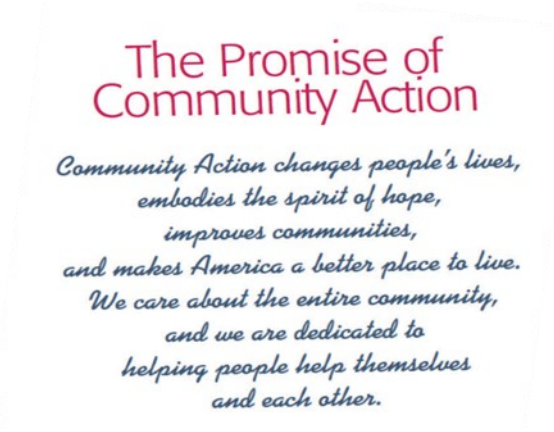
McCurtain County

312 W. Texas St.

Idabel, Ok. 74745

580-286-9348

www.liftcaa.org





LOCAL VICTIM ADVOCACY SERVICES

24/7

CALL or TEXT

580-372-0806

or

580-372-0816

Serving Choctaw, Pushmataha, and McCurtain Counties

This project was supported by Grant # 2017-WR-AX-0046 awarded by the Office on Violence Against Women, U.S. Department of Justice. The opinions, findings, conclusions, and recommendations expressed in this publication/program/exhibition are those of the author(s) and do not necessarily reflect the views of the Department of Justice, Office on Violence Against Women.

This institution is an equal opportunity provider & employer



Meeting the needs of rural victims of sexual assault, domestic violence, dating violence, and stalking in Pushmataha, Choctaw, and McCurtain Counties

Lift
Community Action Agency



Domestic Violence.

It's never this obvious.

Get Help. Get Answers. Make the Call.

24/7 Call or Text

580-372-0806 or 580-372-0816



You didn't deserve it. It's *NEVER* the victim's fault. No excuse for sexual assault.

24/7 Call or Text

580-372-0806 or 580-372-0816

ASSISTANCE AVAILABLE:

Services provided: Emergency services to victims such as resources, food, clothing, shelter, community outreach, victim advocacy, safety plans, court system advocacy, accompaniment for medical examinations, and transportation

Victim Advocate duties:

Respond to the emotional and physical needs of crime victims

Assist primary and secondary victims of crime to stabilize their lives after victimization

Assist victims to understand and participate in the criminal justice system

Provide the victims of crime a measure of safety and security

Assistance with Victim Compensation Claim Forms and Victim Restitution Recovery Forms

STALKING IS ONE OF THE FEW CRIMES WHERE EARLY INTERVENTION CAN PREVENT VIOLENCE & DEATH

Not romantic.....Not a joke.....

It's a crime.

24/7 Call or Text

580-372-0806 or 580-372-0816



Don't be that ONE. Get Help.

24/7 Call or Text

580-372-0806 or 580-372-0816



Program Service Data – Victim Advocacy Services
Period: October 1, 2022 through September 30, 2023

Crime	***Primary & Secondary Victims - NEW***
Adult Physical Assault	90
Elder Abuse	0
Adult Sexual Assault	2
Bullying	3
Kidnapping (Non-custodial)	0
Child Physical Abuse	3
Child Sexual Abuse/assault	0
Domestic/Family Violence	27
Stalking/Harassment	17
Robbery	1
Total number of new victims served	**143**

Program Service Data – Safe Place Healing Hearts & Safe Place Healing Hearts Too
Period: July 1, 2022 through June 30, 2023

Crime	***Primary and Secondary Victims - NEW***
Domestic Violence /Dating Violence	379
Sexual Assault	12
Stalking	19
Child Sexual Abuse	11
Total number of new victims served	**399**

The Victim Advocacy Services program was established through a Victims of Crime Act Grant from the Oklahoma District Attorney's Council on July 1, 2015. This program serves victims of any crime. The Safe Place Healing Hearts Program was established in October 2017 through a Rural Domestic Violence, Dating Violence, Sexual Assault, and Stalking Program Grant from the Office on Violence Against Women. The agency's newest program is Safe Place Healing Hearts Too, which was established in October 2021. The program is funded by the Office on Violence Against Women, under the Grants to Prevent and Respond to Domestic Violence, Dating Violence, Sexual Assault and Stalking Against Children and Youth Program. Since July 2015, the programs combined have served a total of **2,839 unduplicated victims of crime.**

Program Service Data – Court Appointed Special Advocates
Period: October 1, 2022 through September 30, 2023

Crime	***New Child Victims***
Child Physical Abuse or Neglect	61
Child Sexual Abuse	3

The LIFT CASA program has been in existence for 26 years. This past year, 64 new children were served and 30 children had their cases closed achieving reunification or safe placement. This data is not included in service counts for the Safe Place Healing Hearts Programs or Victim Advocacy Services. The program is funded through a VOCA Grant from the District Attorney's Council and the Oklahoma CASA Association.

LIFT Victim Services Programs

Community Action Agency

Support Services & Advocacy Feedback Form

1. People come to our program for different types of assistance. The following list describes different types of services you may have wanted, and may have received from someone in this program. Every person wants and needs different things, so there are no "right" answers.

Please "Check" beside the type of help you have received or hope to receive while working with our agency.

100%talking to someone who understands my situation
100%help figuring out how I can be safer
60%help keeping custody of my children
20%help with safe visitation for my children
10%help getting child support
30%help getting access to child care
15%help with child protection hearings or requirements
10%education/school for my children
10%help with health insurance for my children
25%getting access to health care
10%help getting medical benefits
50%help getting access to mental health services
30%help getting access to substance abuse services
80%help with government benefits(e.g. welfare/TANF, food stamps, others
90%Learning more about why/how domestic violence happens
5%help meeting my needs related to my disability or my child's
30%help with budgeting
80%help getting safe and adequate housing
60%Help getting a job
10%education/school for myself
60%information about counseling options
90%support to make some changes in my life
90%help with a protective order
80%information about the legal system process
90%someone to go with me to court
100%information about my legal rights and options

LIFT Victim Services Programs

80%help supporting the court case against the person who abused me
0%help stopping the court case against the person who abused me
0%help with probation issues
30%help getting access to an attorney
0%help with police issues
60%help preparing to testify in court
0%help dealing with my arrest
25%help dealing with sexual abuse services for me or my children
1%help understanding my rights & options related to my residency status
1%help getting benefits as an immigrant
1%help getting residency status
40%help getting support from faith community
95%help arranging transportation to meet my needs
70%help ending my relationship
2%help staying in my relationship safely

Because of the advocacy/support services I have received from this program so far, I feel (please check either yes or no):

Yes	No		Yes	No	
100%	___	I know more ways to plan for my safety	99%	___	more hopeful about the future
99%	___	I know more about community resources	99%	___	more comfortable asking for help
95%	___	I know more about my rights and options	98%	___	more confident in my decision-making
95%	___	that I will achieve the goals I set for myself	98%	___	like I can do more things on my own

2. Overall, thinking about my experience with this program so far, I would rate the help I have received as:
90%very helpful 10%helpful ___a little helpful ___not at all helpful

3. If a friend of mine told me she was thinking of coming here for help, I would:
95%strongly recommend 5%recommend ___not recommend ___strongly not recommend

PARTNER SATISFACTION QUESTIONNAIRE						
LIFT Victim Services Programs						
		strongly agree	**somewhat agree**	**neutral**	**somewhat disagree**	**strongly disagree**
1.	Overall I am satisfied with LIFT Victim Services Program	100%				
2.	When provided with technology, training, resources, or supplies by the LIFT Victim Services Program-it helped me improve service to victims	100%				
3.	LIFT Victim Services Program staff are available and timely when needed	100%				
4.	Assistance from the LIFT Victim Services Program staff was helpful and provided additional assistance to victims	100%				
5.	I have increased knowledge about resources and services provided by LIFT Victim Services Program	100%				
6.	Communication and partnership with LIFT Victim Services Program staff has been open and beneficial	100%				
7.	LIFT Victim Services Program assistance has enhanced or increased evidence and prosecution efforts	100%				

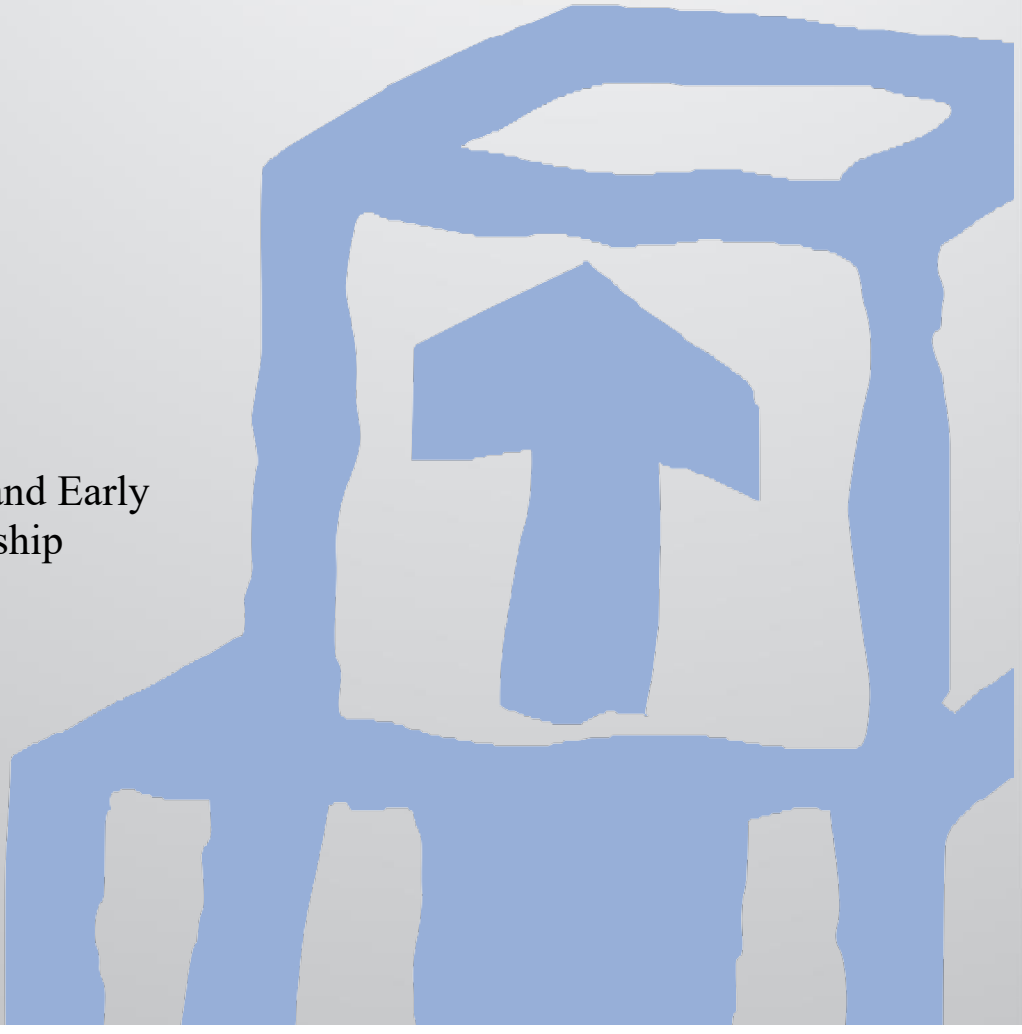
Lift
Community Action Agency

LIFT C.A.A.

Head Start, Early Head Start, Early Head Start _ Child Care

Integrated Services Policies and Procedures

ERSEA Plan 2024 - 2025



Head Start, Early Head Start, and Early Head Start-Child Care Partnership

1302 – PROGRAM OPERATIONS

Performance Standard 1302.1 Overview.

This part implements these statutory requirements in Sections 641A, 645, 645A, and 648A of the Act by describing all of the program performance standards that are required to operate Head Start, Early Head Start, American Indian and Alaska Native and Migrant or Seasonal Head Start programs. The part covers the full range of operations from enrolling eligible children and providing program services to those children and their families, to managing programs to ensure staff are qualified and supported to effectively provide services. This part also focuses on using data through ongoing pro- gram improvement to ensure high-quality service. As required in the Act, these provisions do not narrow the scope or quality of services covered in previous regulations. Instead, these regulations raise the quality standard to reflect science and best practices, and streamline and simplify requirements so programs can better understand what is required for quality services.

Subpart A — Eligibility, Recruitment, Selection, Enrollment, and Attendance

Performance Standard 1302.10 Purpose.

This subpart describes requirements of grantees for determining community strengths, needs and resources as well as recruitment areas. It contains requirements and procedures for the eligibility determination, recruitment, selection, enrollment, and attendance of children and explains the policy concerning the charging of fees.

Policy 1302.10 Purpose.

The purpose of this policy is to provide guidance in assisting program staff and Policy Council in planning, operating, and evaluating the eligibility, recruitment, selection, enrollment, and attendance process within the LIFT CAA HS/EHS/EHS-CC programs, which prepares them for school readiness.

Performance Standard 1302.11 Determining community strengths, needs, and resources. *(a)* Service area.

(1) A program must propose a service area in the grant application and define the area by county or subcounty area, such as a municipality, town or census tract or jurisdiction of a federally recognized Indian reservation.

(2) If a program decides to change the service area after ACF has approved its grant application, the program must submit to ACF a new service area proposal for approval.

(a) Community wide strategic planning and needs assessment (community assessment).

(1) To design a program that meets community needs, and builds on strengths and resources, a program must conduct a community assessment at least once over the five-year grant period. The community assessment must use data that describes community strengths, needs, and resources and include, at a minimum:

(i) The number of eligible infants, toddlers, preschool age children, and expectant mothers, including their geographic location, race, ethnicity, and languages they speak, including:

(A) Children experiencing homelessness in collaboration with, to the extent possible, McKinney-Vento Local Education Agency Liaisons (42 U.S.C. 11432 (6)(A));

(B) Children in foster care; and

(C) Children with disabilities, including types of disabilities and relevant services and resources provided to these children by community agencies;

(ii) The education, health, nutrition and social service needs of eligible children and their families, including prevalent social or economic factors that impact their well-being;

(iii) Typical work, school, and training schedules of parents with eligible children;

(iv) Other child development, child care centers, and family child care programs that serve eligible children, including home visiting, publicly funded state and local pre-schools, and the approximate number of eligible children served;

(v) Resources that are available in the community to address the needs of eligible children and their families; and,

(vi) Strengths of the community.

(2) A program must annually review and update the community assessment to reflect any significant changes including increased availability of publicly-funded pre-kindergarten (including an assessment of how the prekindergarten available in the community meets the needs of the parents and children served by the program, and whether it is offered for a full school day), rates of family and child homelessness, and significant shifts in community demographics and resources.

(3) A program must consider whether the characteristics of the community allow it to include children from diverse economic backgrounds that would be supported by other funding sources, including private pay, in addition to the program's eligible funded enrollment. A program must not enroll children from diverse economic backgrounds if it would result in a program serving less than its eligible funded enrollment.

Policy 1302.11 Determining community strengths, needs and resources (a)

(a) Service Area.

(1) The program has proposed a service area in the grant application and defined the area as Choctaw, Pushmataha, and McCurtain Counties.

(2) The program will submit a new service area proposal to ACF for approval should there be a need to change the service area.

(b) Community wide strategic planning and needs assessment (community assessment):

(1) The Community Assessment process is a review of the changing demographics and resources in the service area and is completed once every five years with updates conducted annually during the five-year period. The updates review any significant changes in the service area. The Community Assessment is a collection and analysis of information on the strengths, needs and resources of the families, as well as the program and the communities within the service area including the required items listed in 1302.11(b)(i)-(vi). The required data for the Community Assessment is gathered from numerous resources outside the agency such as, public schools, local community agencies, U.S. Census, and state agencies, etc. and from sources inside the agency such as enrollment forms, IEPs, CLASS, family surveys, PIRs, etc. The information contained in the Community Assessment helps the program make informed decisions about the service area including: program options, hours of operation, staff composition, delivery of services; and develop strategic plans for the program; identify underserved populations in the service area; assess available program and community resources; along with many other decisions. The Community Assessment is also used to identify areas with high concentrations of families in poverty as well as community-based agencies that can refer interested, eligible families.

(2) The program performs a detailed Community Assessment every five years. The program annually reviews and updates the Community Assessment to reflect any significant changes including how the pre-kindergarten available in the communities meets the needs of parents

and children, whether it is offered for a full school day, rates of family and child homelessness, and significant shifts in community demographics and resources.
(3) Consideration is made within the service area to include children with diverse economic backgrounds. This is achieved through the prioritization schedule and through a designation of "Medically Underserved" which allows designated areas to serve up to 50% of a town's enrollment in children above the poverty guidelines.

The program does not enroll children from diverse economic backgrounds when it would result in serving less than the funded enrollment.

Performance Standard 1302.12 Determining, verifying, and documenting eligibility.

(a) Process overview.

(1) Program staff must:

(i) Conduct an in-person interview with each family, unless paragraph (a)(2) of this section applies;

(ii) Verify information as required in paragraphs (h) and (i) of this section; and,

(iii) Create an eligibility determination record for enrolled participants according to paragraph (k) of this section.

(2) Program staff may interview the family over the telephone if an in-person interview is not possible or convenient for the family.

(3) If a program has an alternate method to reasonably determine eligibility based on its community assessment, geographic and administrative data, or from other reliable data sources, it may petition the responsible HHS official to waive requirements in paragraphs (a)(1)(i) and (ii) of this section.

(b) Age requirements.

(1) For Early Head Start, except when the child is transitioning to Head Start, a child must be an infant or a toddler younger than three years old.

(2) For Head Start, a child must:

(i) Be at least three years old or, turn three years old by the date used to determine eligibility for public school in the community in which the Head Start program is located; and,

(ii) Be no older than the age required to attend school.

(3) For Migrant or Seasonal Head Start, a child must be younger than compulsory school age by the date used to determine public school eligibility for the community in which the program is located.

(c) Eligibility requirements.

(1) A pregnant woman or a child is eligible if:

(i) The family's income is equal to or below the poverty line; or,

(ii) The family is eligible for or, in the absence of child care, would be potentially eligible for public assistance; including SNAP; or, TANF child-only payments; or, (iii) The child is homeless, as defined in part 1305; or, (iv) The child is in foster care.

(2) If the family does not meet a criterion under paragraph (c)(1) of this section, a program may enroll a child who would benefit from services, provided that these participants only make up to 10 percent of a program's enrollment in accordance with paragraph (d) of this section.

(d) Additional allowances for programs.

(1) A program may enroll an additional 35 percent of participants whose families do not meet a criterion described in paragraph (c) of this section and whose incomes are below 130 percent of the poverty line, if the program:

(i) Establishes and implements outreach, and enrollment policies and procedures to ensure it is meeting the needs of eligible pregnant women, children, and children with disabilities, before serving pregnant women or children who do not meet the criteria in paragraph (c) of this section; and,

(ii) Establishes criteria that ensure pregnant women and children eligible under the criteria listed in paragraph (c) of this section are served first.

(2) If a program chooses to enroll participants who do not meet a criterion in paragraph (c) of this section, and whose family incomes are between 100 and 130 percent of the poverty line, it must be able to report to the Head Start regional program office:

(i) How it is meeting the needs of low-income families or families potentially eligible for public assistance, homeless children, and children in foster care, and include local demographic data on these populations;

(ii) Outreach and enrollment policies and procedures that ensure it is meeting the needs of eligible children or pregnant women, before serving over-income children or pregnant women;

(iii) Efforts, including outreach, to be fully enrolled with eligible pregnant women or children;

(iv) Policies, procedures, and selection criteria it uses to serve eligible children;

(v) Its current enrollment and its enrollment for the previous year;

(vi) The number of pregnant women and children served, disaggregated by the eligibility criteria in paragraphs (c) and (d)(1) of this section; and,

(vii) The eligibility criteria category of each child on the program's waiting list.

(g) Eligibility requirements for communities with 1,000 or fewer individuals.

(1) A program may establish its own criteria for eligibility provided that it meets the criteria outlined in section 645(a)(2) of the Act.

(2) No child residing in such community whose family is eligible under criteria described in paragraphs (c) through (f) of this section, may be denied an opportunity to participate in the program under the eligibility criteria established under this paragraph (g).

(h) Verifying age. Program staff must verify a child's age according to program policies and procedures. A program's policies and procedures cannot require families to provide documents that confirm a child's age, if doing so creates a barrier for the family to enroll the child.

(i) Verifying eligibility.

(1) To verify eligibility based on income, program staff must use tax forms, pay stubs, or other proof of income to determine the family income for the relevant time period.

(i) If the family cannot provide tax forms, pay stubs, or other proof of income for the relevant time period, program staff may accept written statements from employers, including individuals who are self-employed, for the relevant time period and use information provided to calculate total annual income with appropriate multipliers.

(ii) If the family reports no income for the relevant time period, a program may accept the family's signed declaration to that effect, if program staff describes efforts made to verify the family's income, and explains how the family's total income was calculated or seeks information from third parties about the family's eligibility if the family gives written consent. If a family gives consent to contact third parties, program staff must adhere to program safety and privacy policies and procedures and ensure the eligibility determination record adheres to paragraph (k)(2) of this section.

(iii) If the family can demonstrate a significant change in income for the relevant time period, program staff may consider current income circumstances.

(2) To verify whether a family is eligible for, or in the absence of childcare, would be potentially eligible for public assistance, the program must have documentation from either the state, local, or tribal public assistance agency

that shows the family either receives public assistance or that shows the family is potentially eligible to receive public assistance.

(3) To verify whether a family is homeless, a program may accept a written statement from a homeless services provider, school personnel, or other service agency attesting that the child is homeless or any other documentation that indicates homelessness, including documentation from a public or private agency, a declaration, information gathered on enrollment or application forms, or notes from an interview with staff to establish the child is homeless; or any other document that establishes homelessness.

(i) If a family can provide one of the documents described in this paragraph (i)(3), program staff must describe efforts made to verify the accuracy of the information provided and state whether the family is eligible because they are homeless.

(ii) If a family cannot provide one of the documents described in this paragraph (i)(3) to prove the child is homeless, a program may accept the family's signed declaration to that effect, if, in a written statement, program staff describe the child's living situation that meets the definition of homeless in part 1305 of this chapter.

(iii) Program staff may seek information from third parties who have firsthand knowledge about a family's living situation if the family gives written consent. If the family gives consent to contact third parties, program staff must adhere to program privacy policies and procedures and ensure the eligibility determination record adheres to paragraph (k) of this section.

(3) To verify whether a child is in foster care, program staff must accept either a court order or other legal or government-issued document, a written statement from a government child welfare official that demonstrates the child is in foster care, or proof of a foster care payment.

(j) Eligibility duration.

(1) If a child is determined eligible under this section and is participating in a Head Start program, he or she will remain eligible through the end of the succeeding program year except that the Head Start program may choose not to enroll a child when there are compelling reasons for the child not to remain in Head Start, such as when there is a change in the child's family income and there is a child with a greater need for Head Start services.

(2) Children who are enrolled in a program receiving funds under the authority of section 645A of the Act remain eligible while they participate in the program.

(3) If a child moves from an Early Head Start program to a Head Start program, program staff must verify the family's eligibility again.

(4) If a program operates both an Early Head Start and a Head Start program, and the parents wish to enroll their child who has been enrolled in the program's Early Head Start, the program must ensure, whenever possible, the child receives Head Start services until enrolled in school, provided the child is eligible.

(k) Records.

(1) A program must keep eligibility determination records for each participant and ongoing records of the eligibility training for staff required by paragraph (m) of this section. A program may keep these records electronically.

(2) Each eligibility determination record must include:

(i) Copies of any documents or statements, including declarations, that are deemed necessary to verify eligibility under paragraphs (h) and (i) of this section;

(ii) A statement that program staff has made reasonable efforts to verify information by:

(A) Conducting either an in-person, or a telephone interview with the family as described under paragraph (a)(1)(i) or (a)(2) of this section; and,

(B) Describing efforts made to verify eligibility, as required under paragraphs (h) through (i) of this section; and, collecting documents required for third party verification that includes the family's written consent to contact each third party, the third parties' names, titles, and affiliations, and information from third parties regarding the family's eligibility.

(iii) A statement that identifies whether:

(A) The family's income is below income guidelines for its size, and lists the family's size; (B) The family is eligible for or, in the absence of child care, potentially eligible for public assistance;

(C) The child is a homeless child or the child is in foster care; The family was determined to be eligible under the criterion in paragraph (c)(2) of this section; or,

(D) The family was determined to be eligible under the criterion in paragraph (d)(1) of this section.

(3) A program must keep eligibility determination records for those currently enrolled, as long as they are enrolled, and, for one year after they have either stopped receiving services; or are no longer enrolled.

(l) Program policies and procedures on violating eligibility determination regulations. A program must establish written policies and procedures that describe all actions taken against staff who intentionally violate federal and program eligibility determination regulations and who enroll pregnant women and children that are not eligible to receive Early Head Start or Head Start services.

(m) Training on eligibility.

(1) A program must train all governing body, policy council, management, and staff who determine eligibility on applicable federal regulations and program policies and procedures. Training must, at a minimum:

(i) Include methods on how to collect complete and accurate eligibility information from families and third-party sources;

(ii) Incorporate strategies for treating families with dignity and respect and for dealing with possible issues of domestic violence, stigma, and privacy; and,

(iii) Explain program policies and procedures that describe actions taken against staff, families, or participants who attempt to provide or intentionally provide false information.

(2) A program must train management and staff members who make eligibility determinations within 90 days of hiring new staff.

(3) A program must train all governing body and policy council members within 180 days of the beginning of the term of a new governing body or policy council.

(4) A program must develop policies on how often training will be provided after the initial training.

Policy 1302.12 Determining, verifying, and documenting eligibility.

(a) Process overview. **Also see Prioritization Schedule for additional information*

(1) Staff Must:

i. Families that apply for services will receive an interview from program staff. This interview will be completed in-person unless it is inconvenient or not possible in which case a telephone interview will take place.

ii. The interview will consist of families discussing their application, validating information submitted, child's age, family income, immunization records and eligibility categories.

iii. Staff will create an eligibility determination record for each enrolled participant

(3) N/A

(b) Age requirements.

(1) All Early Head Start and Early Head Start Child Care children, except when transitioning to Head Start, are younger than three years old.

(2) For Head Start, a child must:

i. be at least three years old or, turn three years old by September 1st as determined by Oklahoma public school systems;

ii. Be no older than 4 years of age by September 1st as is determined by Oklahoma public school systems.

(3) N/A

(c) Eligibility requirements.

(1) LIFT does not serve pregnant women. A child is eligible if:

i. The family's income is equal to or below the poverty line; or,

ii. The family is eligible for or, in the absence of child care, would be potentially eligible for public assistance; including SNAP; or, TANF child-only payments; or, (iii)

iii. The child is homeless, as determined using McKinney-Vento; or, (iv)

iv. The child is in foster care.

(2) LIFT will use the current Federal Poverty Guidelines. The program may enroll up to ten percent of children who are over the poverty guideline, with the exclusion of towns that have been designated medically underserved by the regional Head Start office.

(d) Additional allowances for programs.

(1) LIFT will enroll up to an additional 35 percent of participants whose families are neither income nor categorically eligible and whose families are below 130 percent of the poverty line if all other avenues have been exhausted.

i. LIFT will be able to show that it has implemented outreach and enrollment procedures to ensure it is meeting the needs of income or categorically eligible children and children with disabilities before serving ineligible children, with the exception of medically underserved designations.

ii. LIFT has established criteria that ensure eligible children are served first.

(2) If LIFT chooses to enroll participants who do not meet a criterion in paragraph (c) of this section, and whose family incomes are between 100 and 130 percent of the poverty line, LIFT will be able to report to the Head Start regional program office the following:

i. How it is meeting the needs of low-income families or families potentially eligible for public assistance, homeless children, and children in foster care, and include local demographic data on these populations;

ii. Outreach and enrollment policies and procedures that ensure it is meeting the needs of eligible children, before serving over-income children;

iii. Efforts, including outreach, to be fully enrolled with eligible children;

iv. Policies, procedures, and selection criteria it uses to serve eligible children;

v. Its current enrollment and its enrollment for the previous year;

vi. The number of children served, broken down by eligibility categories;

vii. The eligibility criteria category of each child on the program's waiting list.

(e) N/A – Applies to Indian Tribes

(f) N/A – Applies to migrant/seasonal

(g) Eligibility requirements for communities with 1,000 or fewer individuals.

(1) LIFT uses an approved selection criterion approved by governing board and policy council that integrates medically underserved designations within its design.

(2) LIFT will serve all eligible children within licensing standards and capacity.

(h) Verifying age. LIFT will verify a child's age with documentation of birth records unless doing so creates a barrier for the family to enroll the child. Staff will work with the family to obtain verification.

(i) Verifying eligibility.

(1) Families are required to provide tax forms, pay stubs, or other proof of income for the relevant time period,

i. If these are not available, staff may use written statements from employers, including individuals who are self-employed to calculate the total annual income.

ii. If a family reports no income, staff may accept the family's signed declaration of no income and must describe efforts to verify family income, explain how the income was calculated and seek information from a third party if the family gives written consent.

iii. If a family can demonstrate a significant change in income for the relevant time period, staff will consider the current income circumstances when determining eligibility and will have families complete new documentation.

(2) To verify whether a family is eligible for, or in the absence of childcare, would be potentially eligible for public assistance, LIFT will require documentation from state, local or tribal public assistance programs verifying that a family is receiving public assistance or that shows the family is potentially eligible to receive public assistant.

(3) LIFT will accept a written statement from a homeless service provider, school personnel, or other service agency to verify that a family is homeless or any other documentation that indicates homelessness including documentation from a public or private agency, a declaration, information gathered on application forms, or notes from an interview.

A family is categorically eligible if the child is homeless or is in foster care. If determined categorically eligible a child will be able to attend a Head Start program without immunization, for a limited number of days as in accordance with OKDHS licensing standards and other medical records, birth certificates or other documents if this is considered a barrier for program participation. The program will give the family reasonable time to provide these documents.

i. If the family can provide one of these documents, LIFT will describe efforts made to verify the accuracy of the information provided and state whether the family is eligible because they are homeless.

ii. If a family cannot provide one of the documents, LIFT will accept a signed declaration of homelessness.

iii. If the family gives written consent, LIFT may seek information from third parties who have firsthand knowledge of the family's living situation.

(4) To verify a child is in foster care, LIFT will accept either a court order or other legal or government-issued document, a written statement from a government child welfare official that shows a child is in foster care, or proof of a foster care payment. A family is categorically eligible if the child is homeless or is in foster care. If determined

categorically eligible, a child will be able to attend a Head Start program without immunization, for a limited number of days as in accordance with OKDHS licensing regulations and other medical records, birth certificates or other documents if this is considered a barrier for program participation. The program will give the family reasonable time to provide these documents.

(j) Eligibility duration.

(1) Each child that is enrolled will be allowed to remain in Head Start until kindergarten is available in that child's community, unless there is a compelling reason for that child not to remain in Head Start and there is a child with a greater need for Head Start services. The ERSEA Specialist in conjunction with the Head Start Director will determine if there is a compelling reason for the child not to remain in Head Start. If a child has been found income eligible and is participating in the program, he/she will remain income eligible throughout the enrollment year and the immediately succeeding enrollment year. If a child remains enrolled for a third year, the income will be re-verified for the family.

(2) EHS/EHS-CC children will remain eligible while they participate in EHS/EHS-CC.

(3) Early Head Start children, who transfer out of Early Head Start and into Head Start, will be required to re-verify their income.

(4) Early Head Start children will remain in the program until they turn three years of age. Prior to the child turning three, a Head Start application will be completed to re-verify income. After determining income status, the child will transition into Head Start if there is a vacancy. If there is no vacancy a decision will be made on a case-by-case basis to determine how long a child may remain in Early Head Start. During this time, the parent will work with the teaching staff and Family Advocate to find alternate placement for the child. This child will be placed on the Head Start waiting list and have priority over the other children waiting.

(k) Records.

(1) LIFT keeps each participant's eligibility determination record in each center as well as electronically within the administration office. The program also keeps a record of the ongoing training that each staff member receives at in-service trainings held throughout the year as well as training for the Governing Board, Policy Council and staff who determine eligibility.

(2) Each eligibility determination record includes:

i. Copies of any documents or statements, including declarations, that are deemed necessary to verify eligibility;

ii. A statement that program staff has made reasonable efforts to verify information by:

(A) Conducting either an in-person, or a telephone interview with the family; and,

(B) Describing efforts made to verify eligibility and collecting documents required for third party verification.

iii. A statement that identifies whether:

(A) The family's income is below income guidelines for its size, and lists the family's size;

(B) The family is eligible for or, in the absence of child care, potentially eligible

for public assistance;

(C) The child is a homeless child or the child is in foster care;

(D) The family was determined to be eligible as above income;

(E) The family was determined to be eligible between 100%-130% above income.

(3) LIFT keeps eligibility determination records for children currently enrolled, as long as they are enrolled, and for at least one year after they are no longer enrolled.

(l) Program policies and procedures on violating eligibility determination regulations.

Policies are established in the Standards of Conduct that describe actions taken against staff who intentionally violate federal and program eligibility determinations regulation and who enroll children who are not eligible to receive HS/EHS/EHS-CC services.

(m) Training on eligibility.

(1) The program trains Governing Board, Policy Council, management, and staff who determine eligibility on applicable federal regulations and program policies and procedures.

i. The training includes methods on how to collect complete and accurate eligibility information from families and third-party sources;

ii. How to incorporate strategies for treating families with dignity and respect and for dealing with possible issues of domestic violence, stigma, and privacy; and,

iii. Staff are required to review and sign the Standards of Conduct, which outline implications of violating program policies. Families and participants are interviewed for accuracy within their applications, if a family was found to have submitted false information the application process would begin again and the family would not be placed on the waiting list until accurate information is submitted.

(2) The program trains management and staff members who make eligibility determinations within 90 days of hiring new staff. Special training on recruitment policies and procedures will be given to all center staff during the month of February at In-Service.

(3) The program trains Governing Board annually and Policy Council members within 180 days of the beginning of the term of a new Policy Council.

(4) Training is provided twice annually for all Governing Board Members and Policy Council Members. Training for staff is provided as often as is possible.

Performance Standard 1302.13 Recruitment of children.

In order to reach those most in need of services, a program must develop and implement a recruitment process designed to actively inform all families with eligible children within the recruitment area of the availability of program services, and encourage and assist them in applying for admission to the program. A program must include specific efforts to actively locate and recruit children with disabilities and other vulnerable children, including homeless children and children in foster care.

Policy 1302.13 Recruitment of children.

The program actively recruits within the tri-county area, which includes Choctaw, Pushmataha, and McCurtain counties. The ERSEA specialist assembles recruitment packets during the month of

January/February. These packets provide staff with the materials they need to increase community awareness of the HS/EHS/EHS-CC programs within their area. Contents of these packets are developed with the input of the operational staff and include lists and ideas of where to place posters, news releases, radio announcements, and disability recruitment letters. Special training on recruitment policies and procedures is given to all the center staff during the month of February at in-service. The recruitment process is an ongoing process. Efforts are implemented throughout the entire school year with the emphasis at the center level in February, March, April, and May.

Effort will be made by HS/EHS/EHS-CC staff to recruit and enroll children with disabilities, children with suspected disabilities, homeless and foster care children, and other vulnerable populations. The ERSEA Specialist will mail a recruitment letter to all agencies in the recruitment area that work with children with disabilities notifying them of upcoming vacancies. Staff will make contact with other agencies and professionals (DHS, doctors, mental health agencies, institutions, etc.) for possible referrals of children with disabilities. At least ten percent of the enrollment opportunities will be available for children with disabilities. All children with disabilities will be accepted prior to children without disabilities.

Recruitment packets are assembled by the ERSEA Specialist during the month of January/February. These packets provide staff with the materials they will need to increase community awareness of the HS/EHS/EHS-CC program within their area. Contents of these packets are developed with the input of the management team and include, but are not limited to:

Pamphlets, Posters & Fliers:
Form Listing Places & Dates Where Recruitment Posters Were Placed
Various Recruitment Posters, Fliers and Pamphlets

News Releases:
News Release
Copies of Newspaper Articles
Documentation of Radio Announcements if Applicable

Recruitment Ideas:
Recruitment Ideas List

Income Guidelines/Definition of Income
Head Start Point System & Criteria for Enrollment

Sample Letters to Parents:
Notification of Enrollment
Notification of Orientation

Disability Recruitment Letters:
Form Listing Places Where Disability Recruitment Letters Were Sent
Disability Recruitment Letters

Head Start Applications (Spanish & English)
Manila Envelopes/Application Holders

The ERSEA Specialist, during the months of December and/or January, orders additional materials from the National Head Start publications office and any other agencies which may further help and support the HS/EHS/EHS-CC recruitment philosophy.

The Recruitment process is an on-going process. Efforts will be implemented throughout the entire school year with emphasis at the center level in February, March, April & May. The goal is to have as many applications as possible screened at the initial screening held in May. The process begins with identification of children and families who meet the acceptance criteria. This is accomplished through:

- Information obtained through the LDCAA HS/EHS/EHS-CC Community Assessment Survey.
- Information from current and former Head Start parents and by word of mouth from persons within the community.
- Contact with other agencies and professionals (DHS, doctors, mental health agencies, institutions, etc.) for possible referrals of children with disabilities.
- Placement of recruitment posters in various places including, but not limited to: banks, marquees, hospitals, pediatrician's and Dr.'s offices, libraries, post offices, Walmart, health clinics, laundry mats, grocery stores, and local fast-food restaurants. Other recruitment ideas include, but are not limited to: sending notes home with public school children, setting up tables at Kindergarten public school enrollment, public service announcements on radio and television (news releases must be approved prior to use), OPAT home visits, PTA meetings, WIC and immunization days at the Health Departments, home visits, door to door contact, floats in parades, announcements at public school functions, church revivals, banners on front of buildings announcing enrollment, open house, booth at Fun Days, recruitment placemats/fliers, and carnivals/fairs, etc.

A cover letter is stapled to the front of the recruitment application that informs the parent/legal guardian of what they need to provide to process their application. Families in need of assistance in applying to the program are encouraged to call the administrative office for assistance. Every effort is made to review application and provide assistance to each family.

Performance Standard 1302.14 Selection process.

(a) Selection criteria.

(1) A program must annually establish selection criteria that weigh the prioritization of selection of participants, based on community needs identified in the community needs assessment as described in §1302.11(b), and including family income, whether the child is homeless, whether the child is in foster care, the child's age, whether the child is eligible for special education and related services, or early intervention services, as appropriate, as determined under the Individuals with Disabilities Education Act (IDEA) (20 U.S.C. 1400 et seq.) and, other relevant family or child risk factors.

(2) If a program serves migrant or seasonal families, it must select participants according to criteria in paragraph (a)(1) of this section, and give priority to children whose families can demonstrate they have relocated frequently within the past two-years to pursue agricultural work.

(3) If a program operates in a service area where Head Start eligible children can enroll in high-quality publicly funded pre-kindergarten for a full school day, the program must prioritize younger children as part of the selection criteria in paragraph (a)(1) of this section. If this priority would disrupt partnerships with local education

agencies, then it is not required. An American Indian and Alaska Native or Migrant or Seasonal Head Start program must consider whether such prioritization is appropriate in their community.

(4) A program must not deny enrollment based on a disability or chronic health condition or its severity.

(b) Children eligible for services under IDEA.

(1) A program must ensure at least 10 percent of its total funded enrollment is filled by children eligible for services under IDEA, unless the responsible HHS official grants a waiver.

(2) If the requirement in paragraph (b)(1) of this section has been met, children eligible for services under IDEA should be prioritized for the available slots in accordance with the program's selection criteria described in paragraph (a) of this section.

(c) Waiting lists. A program must develop at the beginning of each enrollment year and maintain during the year a waiting list that ranks children according to the program's selection criteria.

Policy 1302.14 Selection process.

(a) Selection criteria.

(1) LIFT annually establishes selection criteria through a prioritization schedule, based on community needs identified in the community needs assessment as described in §1302.11(b), and including family income, whether the child is homeless, whether the child is in foster care, the child's age, whether the child is eligible for special education and related services, or early intervention services, as appropriate, as determined under the Individuals with Disabilities Education Act (IDEA) (20 U.S.C. 1400 et seq.) and, other relevant family or child risk factors.

Prioritization Schedule Head Start:

- Returning Head Start children
- Returning - Transferred Early Head Start children who met the September 1st cutoff date.

- 4 yr. old categorically eligible children with IEP
- 4 yr. old below income children with IEP
- 4 yr. old categorically eligible children
- 4 yr. old above income children with IEP
- 4 yr. old below income children

- 3 yr. old categorically eligible children with IEP
- 3 yr. old below income children with IEP
- 3 yr. old categorically eligible children
- 3 yr. old above income children with IEP
- 3 yr. old below income children

- 4 yr. old 100-130% eligible children with IEP
- 4 yr. old 100-130% eligible children

- 3 yr. old 100-130% eligible children with IEP
- 3 yr. old 100-130% eligible children

- 4 yr. old above income children– (as approved by the Head Start Director)
- 3 yr. old above income children– (as approved by the Head Start Director)

(10% of the agency's current enrollment of above income children, with the exception of Medically Underserved Centers)
(If vacancies still exist, the ERSEA Specialist will meet with the Head Start Director to determine the classroom's ability to meet its capacity.)

Prioritization Schedule Early Head Start:

- Early Head Start-Child Care children who are not eligible for a subsidy
- Categorically eligible children with IFSP
- Below income children with IFSP
- Above income children with *IFSP*– (as approved by the Head Start Director)
- Categorically eligible children
- Below income children
- Above income children– (as approved by the Head Start Director)

(10% of the agency's current enrollment of above income children)
***Schedule subject to change ensuring compliance of infant/caregiver ratio.*

Prioritization Schedule Early Head Start-CC:

- Categorically eligible children with IFSP
- Below income children with IFSP
- Above income children with *IFSP*– (as approved by the Head Start Director)
- Categorically eligible children
- Below income children
- Above income children– (as approved by the Head Start Director)

(10% of the agency's current enrollment of above income children, with the exception of Medically Underserved Centers)
***Schedule subject to change ensuring compliance of infant/caregiver ratio*

A child who has been enrolled in a child development program in the past will be given additional points on his/her recruitment application when being screened for priority in

keeping with the concept of continuity of care. A child who is enrolled in a Child Care Partner site will be given additional points and a child who receives a childcare subsidy will receive additional points.

If there are slots available where more than one family is eligible, and has the same amount of points, the date of application will be the determining factor.

Only complete applications will be considered at time of screening. If applications are incomplete, the ERSEA Specialist will send the parent a letter requesting additional information. For a diagnosed disability to be considered as a priority, documentation of the disability must be available at time of screening.

Upon receipt of current Federal Income Guidelines, the ERSEA Specialist will distribute them to each center and input it into the child tracking software. The point system and the eligibility criteria will be used by the ERSEA Specialist during screening to determine the number of points a family receives based on the designated criteria in the Point System List.

Four-year-old children will be given priority over three-year-old children for available slots if there's not a disability. Priority will then be given to the application with the most points and going on down the line. Children with an IEP will be given priority.

Three-year-old children who turn three before September 1st will be taken before children who turn three after September 1st. Applicants who turn three after September 1st will be prioritized on a case-by-case basis.

(2) N/A – Applies to migrant/seasonal

(3) LIFT centers in partnership with public schools for the majority of all locations and works with families that would have better placement in a public-school classroom where we are not partnered.

(4) LIFT does not deny enrollment based on a disability or chronic health condition.

(b) Children eligible for services under IDEA.

(1) LIFT ensures at least 10 percent of its total funded enrollment is filled by children eligible for services under IDEA. Should this be a problem, LIFT would request a waiver from the Regional Program Specialist.

(2) LIFT gives additional points to all children with a suspected or identified disability.

(c) Waiting Lists.

LIFT develops at the beginning of each enrollment year and maintains during the year a waiting list that ranks children according to the program's selection criteria. When all possible enrollment vacancies have been filled, the remaining applicants will be put on a waiting list for possible future enrollment. The ERSEA Specialist will be responsible for maintain and updating the "Waiting List" during the school year. LIFT Head Start will strive to obtain more applications prior to the beginning of the enrollment year than enrollment opportunities that are anticipated to be available over the course of the next enrollment year. Every attempt will be made to solicit all available children and families.

LIFT HS/EHS/EHS-CC will solicit applications from as many eligible families within the recruitment area as possible. If necessary, staff will assist families in filling out the application form in order to assure that all information needed for selection is completed.

The staff and family advocates will take the recruitment application and cover letter to as many different locations within the recruitment area as possible. Effort will be made to include all areas where possible eligible families are located.

After enrollment into Early Head Start, the child is eligible to remain in the program until his/her third birthday. If a child enrolled in Early Head Start-Child Care is no longer eligible for a

subsidy they may be transferred to Early Head Start if an opening is available. At age three the child will transition into the Head Start program if income eligible and there is a vacancy. If there is not a vacancy, the child may remain the Early Head Start for an appropriate amount of time determined by the Head Start Management team. During this time, the parent will work with the teaching staff and Family Advocate to find alternate placement for the child. This child will be placed on the Head Start waiting list and have priority over the other children waiting.

Licensing Requirements must be met before any child can remain in Early Head Start past their third birthday.

When a child is currently on an IFSP, a transition meeting will take place to discuss the child's developmental level and if Head Start is the appropriate placement for the child. The meeting will consist of the child's parent(s), the Early Head Start teaching staff, Head Start specialists and the multi-disciplinary team. Based on the child's test scores, if the multi-disciplinary team and the parent(s) determine the child is not developmentally ready for Head Start, the child is eligible to remain in the Early Head Start program for an appropriate amount of time determined by the Head Start Management team. At this time, he/she will be placed on the Head Start waiting list with top priority. During the child's stay the teaching staff, parent(s) and the family advocate will work together to find an alternate placement for the child provided there is no vacancy in Head Start when a transition is deemed appropriate. If the parent(s), teaching staff and multi-disciplinary team feel the child has progressed and is developmentally ready for Head Start the child will transition if there is a vacancy.

Performance Standard 1302.15 Enrollment.

(a) Funded enrollment. A program must maintain its funded enrollment level and fill any vacancy as soon as possible. A program must fill any vacancy within 30 days.

(b) Continuity of enrollment.

(1) A program must make efforts to maintain enrollment of eligible children for the following year.

(2) Under exceptional circumstances, a program may maintain a child's enrollment in Head Start for a third year, provided that family income is verified again. A program may maintain a child's enrollment in Early Head Start as described in §1302.12(j)(2).

(3) If a program serves homeless children or children in foster care, it must make efforts to maintain the child's enrollment regardless of whether the family or child moves to a different service area, or transition the child to a program in a different service area, as required in §1302.72(a), according to the family's needs.

(c) Reserved slots. If a program determines from the community assessment there are families experiencing homelessness in the area, or children in foster care that could benefit from services, the program may reserve one or more enrollment slots for pregnant women and children experiencing homelessness and children in foster care, when a vacancy occurs. No more than three percent of a program's funded enrollment slots may be reserved. If the reserved enrollment slot is not filled within 30 days, the enrollment slot becomes vacant and then must be filled in accordance with paragraph (a) of this section.

(d) Other enrollment. Children from diverse economic backgrounds, who are funded with other sources, including private pay, are not considered part of a program's eligible funded enrollment.

(e) State immunization enrollment requirements. A program must comply with state immunization enrollment and attendance requirements, with the exception of homeless children as described in §1302.16(c)(1).

(f) Voluntary parent participation. Parent participation in any program activity is voluntary, including consent for data sharing, and is not required as a condition of the child's enrollment.

Policy 1302.15 Enrollment.

(a) Funded enrollment.

Enrollment is maintained for all program and vacancies are filled as soon as possible. The program fills these vacancies within 30 days.

When a vacancy exists, the space will be filled from the waiting list within thirty days. The center teacher will notify the ERSEA Specialist by telephone immediately upon a child leaving the program. At which time, the ERSEA Specialist will attempt to accept a child to fill the vacancy. Children will be accepted according to the Prioritization Schedule.

(b) Continuity of enrollment.

(1) Families are sent letters each year that encourage them to return for the upcoming year of Head Start.

(2) If a child remains in the LIFT Head Start program for a 3rd year, the family income is verified again.

(3) When serving families categorized as homeless or foster care every effort is made to accommodate these populations circumstances and continue enrollment. This includes transferring children to centers if locations change, as is possible. If openings are not available when families move then they will be referred to other child care programs.

(c) Reserved slots.

LIFT has not experienced the need to reserve slots for special populations at this time.

(d) Other enrollment.

Children categorized as eligible Head Start, Early Head Start and Early Head Start-CC are only funded through Head Start funding.

(e) Sate immunization enrollment requirements.

LIFT complies with Oklahoma state immunization requirements, including utilizing the emergency exceptions rules for a family experiencing homelessness. If a homeless family is unable to meet immunization requirements the program makes every effort to assist families in getting immunized, they will be allowed into the center for a limited number of days.

(f) Voluntary parent participation.

Parent participation is not a contingency for any child's enrollment.

Performance Standard 1302.16 Attendance.

(a) Promoting regular attendance. A program must track attendance for each child.

(1) A program must implement a process to ensure children are safe when they do not arrive at school. If a child is unexpectedly absent and a parent has not contacted the program within one hour of program start time, the program must attempt to contact the parent to ensure the child's well-being.

(2) A program must implement strategies to promote attendance. At a minimum, a program must:

(i) Provide information about the benefits of regular attendance;

(ii) Support families to promote the child's regular attendance;

(iii) Conduct a home visit or make other direct contact with a child's parents if a child has multiple unexplained absences (such as two consecutive unexplained absences); and,

(iv) within the first 60 days of program operation, and on an ongoing basis thereafter, use individual child attendance data to identify children with patterns of absence that put them at risk of missing ten percent of program days per year and develop appropriate strategies to improve individual attendance among identified children, such as direct contact with parents or intensive case management, as necessary.

(3) If a child ceases to attend, the program must make appropriate efforts to reengage the family to resume attendance, including as described in paragraph (a)(2) of this section. If the child's attendance does not resume, then the program must consider that slot vacant. This action is not considered expulsion as described in §1302.17.

(b) Managing systematic program attendance issues. If a program's monthly average daily attendance rate falls below 85 percent, the program must analyze the causes of absenteeism to identify any systematic issues that contribute to the program's absentee rate. The program must use this data to make necessary changes in a timely manner as part of ongoing oversight and correction as described in §1302.102(b) and inform its continuous improvement efforts as described in §1302.102(c).

(c) Supporting attendance of homeless children.

(1) If a program determines a child is eligible under §1302.12(c)(1)(iii), it must allow the child to attend for up to 90 days or as long as allowed under state licensing requirements, without immunization and other records, to give the family reasonable time to present these documents. A program must work with families to get children immunized as soon as possible in order to comply with state licensing requirements.

(2) If a child experiencing homelessness is unable to attend classes regularly because the family does not have transportation to and from the program facility, the program must utilize community resources, where possible, to provide transportation for the child.

Policy 1302.16 Attendance.

(a) Promoting regular attendance.

LIFT tracks each individual child's attendance, within the ChildPlus software program.

(1) LIFT has implemented a process to ensure children are safe when they do not arrive at school. If a child is unexpectedly absent and a parent has not contacted the program within one hour of program start time, the staff must attempt to contact the parent to ensure the child's well-being.

(2) LIFT has implemented strategies to promote attendance. The program does the following:

i. Upon enrollment each family is required to review the parent handbook that outlines attendance standards. The families are informed that regular attendance is a requirement of the program and each child needs the stability of the program schedule to ensure they receive what they need to succeed in kindergarten. These benefits are continually explained to families through the school year by way of parent teacher conferences, home visits, and attendance letters. Families are required to sign an attendance agreement that promotes a shared responsibility to have their child at the center daily.

ii. A teacher is required to conduct a home visit if multiple consecutive unexplained absences occur. The teacher is required to document this visit in child plus and inform the ERSEA department of occurrence. Staff will be sure to discuss the reason for the absence, emphasize the importance of regular attendance and how attendance affects school readiness goals, and be sensitive to any special family

circumstances when talking with the family. This could constitute the necessity to develop an attendance improvement plan.

When a child is absent in HS/EHS/EHS-CC, the teacher will initiate family support procedures including a phone call and/or home visit. Staff will be sure to discuss the reason for the absence, emphasize the importance of regular attendance and how attendance affects school readiness goals, and be sensitive to any special family circumstances when talking with the family.

All contacts with the family will be documented on the Family Contact Log and or the attendance notes/comments. Any assistance given to the family to help the family meet a need or fulfill a goal will also be documented on the Family Contact Log. Documentation of all home visits and phone calls will be included on the Time & Attendance comments section of Child Plus for that particular child.

The teacher will update the time & attendance in Child Plus database and the ERSEA Specialist will review the completed Time & Attendance and absenteeism notes log.

If after the ERSEA Specialist has reviewed the pattern of absences and has determined that they are a result of illness or if they are well documented absences for other reasons, no further special action will be required.

iii. Staff will attempt to conduct a home visit or make other direct contact with the child's parents if a child has multiple unexplained absences and,

iv. Within the first 60 days of program operation, and on an ongoing basis thereafter, LIFT uses individual child attendance data to identify children with chronic patterns of absence that put them at risk of missing ten percent of program days per year and develops appropriate strategies to improve individual attendance among identified children, such as direct contact with parents or an attendance improvement plan, as necessary. The teacher will document the reasons for the absences on the Time & Attendance Log. The ERSEA Specialist will review the pattern of absences for each child, including the number of absences that occur on consecutive days. The ERSEA Specialist will analyze the causes for absenteeism and determine if further consultation with the parents is required. Teachers are required to monitor attendance and if they see a child with chronic attendance issues an attendance improvement plan is to be developed.

(3) If a child ceases to attend, LIFT will make appropriate efforts to reengage the family to resume attendance. If the child's attendance does not resume, then the child will be dropped from the program.

(b) Managing systematic program attendance issues.

If the program's monthly average daily attendance rate falls below 85 percent, the program will analyze the causes of absenteeism to identify any systematic issues that contribute to the program's absentee rate. The program will use this data to make necessary changes in a timely manner as part of ongoing oversight and correction by making necessary decisions to fuel program performance and inform its continuous improvement efforts by making strategic decisions to aid policies.

(c) Supporting attendance of homeless children.

(1) If LIFT determines a child is eligible by reason of homeless, it will allow the child to attend for up to 90 days if allowable within OKDHS licensing requirements, without immunization and other records, to give the family reasonable time to present these documents. LIFT will work with families to get children immunized as soon as possible in order to comply with state licensing requirements.

(2) If a child experiencing homelessness is unable to attend classes regularly because the family does not have transportation to and from the program facility, Family Advocates will attempt to locate any available community resources to provide transportation for the child.

POINT SYSTEM

		EHS-CC	EHS	HS
CHILD - DISABILITIES SUSPECTED	Visual impairment, including blindness	10	10	10
	Hearing impairment, including deafness	10	10	10
	Orthopedic impairment	10	10	10
	Speech or language impairment	5	5	5
	Health impairment	10	10	10
	Mental retardation	10	10	10
	Emotional/behavioral disorder	10	10	5
	Learning disability	10	10	10
	Autism	10	10	10
	Traumatic brain injury	10	10	10
	Other impairment	10	10	10
		EHS-CC	**EHS**	**HS**
CHILD - DISABILITY IDENTIFIED	Visual impairment, including blindness	25	25	25
	Hearing impairment, including deafness	25	25	25
	Orthopedic impairment	25	25	25
	Speech or language impairment	15	15	15
	Health impairment	25	25	25
	Mental retardation	25	25	25
	Emotional/behavioral disorder	25	25	25
	Learning disability	25	25	25
	Autism	25	25	25
	Traumatic brain injury	25	25	25
	Other impairment	25	25	25
		EHS-CC	**EHS**	**HS**
FAMILY TYPE	Two parent family			
	Single parent	10	10	10
	Single parent living with partner	5	5	5
	Other relative(s)	15	15	15
	Foster family	20	20	20
	Homeless family	20	20	20
	Other family type	15	15	15
		EHS-CC	**EHS**	**HS**
NUMBER OF CHILDREN IN FAMILY	Five or more	8	8	8
	Four	6	6	6
	Three	4	4	4
	Two	2	2	2
	One			
		EHS-CC	**EHS**	**HS**
PREVIOUSLY ENROLLED (PCPD)	Previously in Early Head Start	10	10	10
	Previously in Parent Child Center	10	10	10
	Previously in Head Start Migrant Program	10	10	10
	Previously in Head Start Home Based Program	10	10	10
	Previously in Comprehensive Child Dev. Program			10
	Previously in Head Start Family Child Care Program			10
	Previously in Head Start Center Based Program			10
	Previously in other Child Development Program	10	10	10

POINT SYSTEM

		EHS-CC	EHS	HS
EDUCATIONAL LEVEL OF ADULT	No school completed	10	10	
	Less or equal to 4th grade	10	10	
	5th - 8th grade	10	10	
	9th - 11th grade	10	10	
	12th grade (no diploma)	10	10	
	High School graduate (diploma or equivalent)	9	9	
	Some college (no degree)	6	6	
	Associates degree in college	5	5	
	Bachelors degree			
	Masters degree			
	Doctorate degree			
		EHS-CC	**EHS**	**HS**
LANGUAGE	Not at all			10
	Not well			5
	Well			0
	Very Well			0
		EHS-CC	**EHS**	**HS**
REFERRAL	Child welfare agency	10	10	10
	Resource and referral agency	10	10	10
	Public or private non-profit agency	10	10	10
	Early Head Start	10	10	10
	Disabilities program (part H)	10	10	10
	Hospital/Health clinic	10	10	10
	Women, Infants, and Children's (WIC)	10	10	10
	Other	10	10	10
		EHS-CC	**EHS**	**HS**
PARENTS AGE	Less than 14	10	10	
	Between 14 - 17	9	9	
	18 or older	5	5	
		EHS-CC	**EHS**	**HS**
CHILD'S AGE	Less than 6 months old	10	10	
	6 months but younger than 12 months	10	10	
	12 months but younger than 18 months	9	9	
	18 months but younger than 24 months	7	7	
	2 years but younger than 3	5	5	
	3 years but younger than 4			
	4 years but younger than 5			75
		EHS-CC	**EHS**	**HS**
OTHER	Receives child care subsidy	50		
	Child enrolled in partner site	25		
	COVID-19 Related Impact on Family	20	20	20
	Child of pregnant mother enrolled in the program		90	20
	Pregnant mother and has an EHS eligible child		20	20
	Family receives TANF as income	20	20	20

POINT SYSTEM

		EHS-CC	EHS	HS
INCOME	01 - 10% below	10	10	10
	11 - 20% below	20	20	20
	21 - 30% below	30	30	30
	31 - 40% below	40	40	40
	41 - 50% below	50	50	50
	51 - 60% below	60	60	60
	61 - 70% below	70	70	70
	71 - 80% below	80	80	80
	81 - 90% below	90	90	90
	91 - 100% below	100	100	100
	Exactly on poverty guideline	0	0	0
	01 - 10% above	-10	-10	-10
	11 - 20% above	-20	-20	-20
	21 - 30% above	-30	-30	-30
	31 - 40% above	-40	-40	-40
	41 - 50% above	-50	-50	-50
	51 - 60% above	-60	-60	-60
	61 - 70% above	-70	-70	-70
	71 - 80% above	-80	-80	-80
	81 - 90% above	-90	-90	-90
	91 - 100% above	-100	-100	-100

Item U

CUSTOMER SATISFACTION

Lift Community Action Agency

OCTOBER-DECEMBER 2023

What is the Customer Satisfaction Survey?

CUSTOMER SATISFACTION SURVEYS ARE DESIGNED TO ALLOW CUSTOMERS AN OUTLET FOR PROVIDING FEEDBACK AFTER SERVICES ARE RENDERED. LDCAA ANALYZES THESE SURVEYS AS AN ADDITIONAL TOOL TO DETERMINE OVERALL EFFECTIVENESS OF PROGRAMS.



CUSTOMER QUOTES

VERY FRIENDLY AND HELPFUL PEOPLE

Satisfaction Level

100%

SATISFIED

Surveys Completed

16 surveys

Demographics

11 FEMALE

4 MALE

19%	AFRICAN AMERICAN	31-50	6%
75%	CAUCASAIN	18 - 30	38%
6%	AMERICAN INDIAN	51 - 65	25%
		66 ABOVE	31%

Counties Represented

Choctaw County	62%
McCurtain County	13%
Pushmataha County	25%

Programs Represented



69% APARTMENTS

31% HOUSING



Community Action Agency

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: 12-29-2023

Name of Person being nominated for Employee of the Month: Kimberly Wright

Name of Person submitting the nomination: Alex Wallis

X	Is a hard worker	Has managed WRO single handedly for a month
X	Respects others	Is always courteous and listens to what we say
	Is on time	
X	Is organized	She is but will tell you she isnt.
X	Keeps a positive attitude	Always says that we can do this. Realist.
X	Encourages other people	Has helped me to grow and learn things
X	Is willing to help others	Always a team player and will jump up to help
	Makes a good first impression	
X	Follows all workplace rules	Yes. From what ive seen
X	Uses resources wisely	Has utilized our budget to find best deals.
X	Has good work attendance	Can be sick as a dog, but will be here.
	Represents the agency well	
X	Is a loyal employee	Always follows the rules and reports as needed
	Handles crisis well	
	Goes above and beyond the call of duty	
X	Works well with others (team player)	Manages our team well and participa

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www.liftca.org

X Is creative Says she isnt, but has ordered decor for workplace

____ Likes to learn new things _____

____ Is a good listener _____

X Communicates well Let you know exactly what is needed

X Dependable Will help and get a job done as soon as tasked

X Respectful, considerate of others listens and offers advice if asked

____ Safety conscious _____

X Good problem solving skills Has worked through many problems

____ Other _____

____ Other _____

____ Other _____

Use this space if you have anything additional that you would like to say about the person being nominated.

Kim is the manager of Work Ready Oklahoma. She was employed in September and was the only employee for over a month (at that point, I was hired). In that time, Kim read and learned the grant and every aspect of the program, sometimes reading the rules and stipulations multiple times. She picked out and ordered all of the furniture, decor, office supplies, and everything else the grant required. Once other employees (including myself) were hired, Kim made sure we were all up to date on the information of the program. She would assign tasks based on individuals skills and wouldnt micro-manage unless asked for assistance. She has made sure all her paperwork is in on time, and if she doesn't have an answer, she will find one. She always greets you in the morning with a smile and a "good morning!" When there is a task to complete, she will immediately get it done and if something is wrong, she will immediately fix it. Kim is an excellent manager and is a pleasure to work with.

Program Summary
Head Start/Early Head Start/Early Head Start-Child Care Programs
December 2023

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of December there were 47 children, age birth to 3, that were provided services in the Early Head Start centers and 99 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 275 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 December, the nutrition team started their second round of CACFP kitchen checks. We were pleased to find there was no findings in our first round of CACFP checks. We are looking to fill, Valliant HS cook position. For the month of December we selected a candidate pending background for the Antlers Early Cook position. For the month of December we also selected a Broken Bow 3 cook. 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 December employee physical tracking continued with reminder phone calls/emails. One CPR class was held. We have continued to receive updates for Child Plus immunizations and Physicals received from centers for entry into Child Plus. Centers were called to remind parents of past due immunization of their child/children. HS centers were updated on requirements regarding physicals, dentals, and immunizations due and/or coming due. To date for head start he have 78% completion of dentals, for EHS 90% completion, and EHSCC 83% completion. For physicals head start has 86% completion, EHS 71% completion, and EHS-CC 67% completion.

Education

The School Readiness Team met on Dec. 6, 2023. Items for discussion were Family & Community Engagement, ERSEA overview, Disabilities/Mental Health, and School Readiness with an emphasis on Conscious Discipline.

The Fall Outcomes Report from Teaching Strategies GOLD was presented to the governing board on December 12, 2023. Information from the social-emotional, physical, language, cognitive, literacy, and mathematics areas will aid teaching staff to implement classroom activities and focus on large and small group learning. Data can be divided into programs, classrooms, and individual child reports. While reviewing the Developmental Child report, parents and teachers can address activities to enhance learning. As a program, TSGOLD data helps inform staff development and strategic planning.

Professional Development

On December 7th, the Professional Development Specialist scheduled CPR/First Aid classes taught by LIFT CPR Instructors Tori Williams, Taryn Creasman, and/or Ronda Spear, where several LIFT employees received or renewed their Adult and Infant CPR and First Aid certifications. Also, the Professional Development Specialist helped several employees renew their Professional Development Ladders and Oklahoma Director Credentials in December.

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, one child has an IFSP and 4 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-six students have been evaluated and have an IEP and will receive special education services from the staff/consultants from the public schools. Fourteen 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 November, four students have completed transition activities.

Recruitment/Outreach

The following recruitment and outreach strategies/activities were implemented or held during the month of December 2023.

Engaging with Public Libraries

To kick off the Christmas season, we provided all our local libraries with Santa letters for kids to have on Christmas Eve. We also included our flyer on the back of the letter to spread information regarding our pre-school program.



- Choctaw County Public Library
- Broken Bow Public Library
- Mattie-Terry Public Library in Valliant
- Idabel Public Library
- Antlers Public Library

Radio Ad

KICK OFF THE NEW YEAR WITH A NEW CAREER! LIFT Head Start, Early Head Start and Early Head Start Childcare is HIRING! We are seeking motivated individuals who have a passion for working with young children, ages 0-4. We have positions available in Choctaw, McCurtain and Pushmataha counties such as: Head Start or Early Head Start Teacher, Teacher Assistant, Special

*Needs Aide, Cook, Family Advocate, or you can even apply to be a substitute! We are offering sign-on incentives starting at $1,000. LIFT Community Action Agency also offers amazing benefits for our full-time employees. Apply today, and take advantage of dental, vision and medical insurance, accrued sick leave, our employee assistance program and retirement plans. If you have questions, please call our Head Start Office at 580-326-7581 or visit www.liftca.orgt to apply! *Incentives will be discussed during the interview process.*

Help Me Grow Newsletter Blast



Parades

- **Valliant Christmas Parade**



- **Hugo Christmas Parade**



Community Partner Meetings

Outreach Specialist attended county coalition meetings and discussed open positions and enrollment.

Facebook Data

- Overall Facebook reach for December: 4,569
- New page likes: 4

- New followers: 9
- Facebook Visits: 302

Recruitment for Enrollment



Impressions: 419
Reach: 406
Engagement: 28



Impressions: 202
Reach: 195
Engagement: 6



Impressions: 808
Reach: 753
Engagement: 26



Impressions: 379

Reach: 350
Engagement: 14

Recruitment for Employment



Impressions: 353
Reach: 336
Engagement: 10



Impressions: 2,103
Reach: 1,998
Engagement: 104

U.S. Department of Health & Human Services | Administration for Children & Families | Office of Head Start

Office of Head Start

Explore content posted to the **Early Childhood Learning and Knowledge Center (ECLKC)** throughout the month of December. 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

- Addressing Questions on the NPRM (video)
- HHS-ED Policy Statement on the Inclusion of Children with Disabilities in Early Childhood Programs (email)
- OHS Proposed Rule to Improve Head Start Program Quality and Support the Workforce (email)
- Dear Tribal Leader Letter on Draft Tribal Facilities Combined Application Guide (email)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- Brilliant Bilingual Preschoolers (video)
- Coaching to Support Friendship Skills and Problem-solving (video)
- Responding to Infant/Toddler Persistent Challenging Behavior (video)
- Supporting Preschoolers' Peer Relationships (video)
- Visual Supports
  - Behavioral Expectations
  - Play
  - Routines and Activities
  - Social and Emotional

Health, Behavioral Health, and Safety

- Addressing Substance Use and Recovery
- Child Feeding Practices
- Cultivating Wellness to Improve Your Health and Well-being Learning Course (email)
- Stay Safe Procedures in Early Childhood Programs (email)
  - Available in Spanish (español)
- Tools and Strategies for Better Organizational Health Literacy (video)

Newsletters

- Disabilities Services Newsletter Issue No. 74
- Resources to Make You Smile! Issue No. 34
  - Available in Spanish (español)
- Sesame Street in Communities Issue No. 27
  - Available in Spanish (español)
- Small Bites Issue No. 11
  - Available in Spanish (español)

Subscribe now to get all your favorite newsletters direct to your inbox.

Head Start Careers

- Associate Director – Engagement and Economic Mobility *San Marcos, CA*
- Bilingual ERSEA Specialist *Redmond, OR*
- Manager of Center Operations *Ocala, FL*

Find more **Head Start program employment opportunities** in the ECLKC Job Center.

Upcoming Events for January

- Monday, Jan. 8: MyPeers Orientation
- Tuesday, Jan. 9: Tackling Challenging Behaviors with Love
- Wednesday, Jan. 10: Winter Garden Storytime
- Wednesday, Jan. 17
  - Integrating Health, Behavioral Health, and Safety in Emergencies
  - Coaching to Support Highly Individualized Practices
- Thursday, Jan. 18
  - Me, You, and Elephants Too!
  - How Social Interactions Build Brains for Language Learning
- Monday, Jan. 22: Infant and Early Childhood Mental Health Consultation National Office Hours
- Thursday, Jan. 25
  - The National Head Start Fellowship Program Informational Webinar
  - MyPeers Orientation for Health Staff
- Tuesday, Jan. 30:
  - Improving Oral Health Literacy Brightens Children's Smiles [in Spanish]
  - Improving Oral Health Literacy Brightens Children's Smiles

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).

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
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
November-23	2469	2362	3176	8007
December-23	1961	1913	2341	6215
YEARLY TOTALS	25455	25688	33383	84,526

November 2023 HEAD START TIME & ATTENDANCE REPORT

As of 11/30/23	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	13	3	16			0	16	0		16		14	92.8%
Antlers 2			0			0	0	0		0			
Battiest	8	1	9	1		1	8	0		8	4	13	78.1%
Boswell 1	10		10	1	1	2	8	1	11/24/2023	9	4	13	91.2%
Boswell 2	10		10	5		5	5	0		5	2	13	86.2%
Broken Bow 1	17	1	18	2		2	16	0		16		14	88.3%
Broken Bow 3	12		12		1	1	11	1	11/13/2023	12		14	80.8%
Clayton 1	13	2	15		1	1	14	1	11/27/2023	15	4	15	80.0%
Clayton 2	9	1	10	1		1	9	0		9	2	15	87.1%
Forest Grove 1	11		11	1		1	10	0		10	5	13	82.3%
Forest Grove 2	16		16			0	16	0		16	9	13	87.5%
Fort Towson	11	1	12	3		3	9	0		9	4	13	80.4%
Haworth	10		10	1		1	9	0		9	1	12	84.3%
Horace Mann 1	11	2	13			0	13	0		13		16	80.1%
Horace Mann 2	13	1	14			0	14	0		14	4	16	82.6%
Horace Mann 3	11	4	15	1		1	14	0		14		16	89.4%
Hugo 2	5	2	7		1	1	6	1	11/3/2023	7		15	79.1%
Hugo 4	9		9			0	9	0		9	1	16	83.3%
Idabel 1	11		11			0	11	0		11		16	93.2%
Idabel 2			0			0	0	0		0			
Idabel 3	14		14	2		2	12	0		12		16	92.2%
Rattan 1	12	1	13	1	1	2	11	1	11/29/2023	12	3	13	92.5%
Rattan 2	3		3			0	3	0		3	3	13	94.9%
Rattan 3	7		7	1		1	6	0		6	1	13	94.9%
Soper 1	12	2	14	1	1	2	12	1	11/28/2023	13	4	16	84.9%
Soper 2	20	1	21	2	1	3	18	1	11/6/2023	19	10	16	90.7%
Valliant 1			0			0	0	0		0			
Valliant 2	14		14	2		2	12	0		12		16	78.7%
TOTALS	282	22	304	25	7	32	272	7		279	61		86.2%

November 2023 Pre-K TIME & ATTENDANCE REPORT

As of 11/30/23	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	13	90.4%
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	4	0	4	0	0	0	4		90.4%

November 2023 EHS Time and Attendance

As of 11/30/23	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	49	3	52	29	2	31	21	1	2	11/29/2023	18	80.2%	Actual number of dropped for Antlers is 1. The other is a transfer
Hugo	27	1	28	15	1	16	12	1	1	11/20/2023	18	81.8%	
Idabel	25	2	27	15	2	17	10	2	2	11/17/2023	18	84.6%	
TOTALS	**101**	**6**	**107**	**59**	**5**	**64**	**43**	**4**	**5**			**81.7%**	Actual number of dropped for EHS is 4.

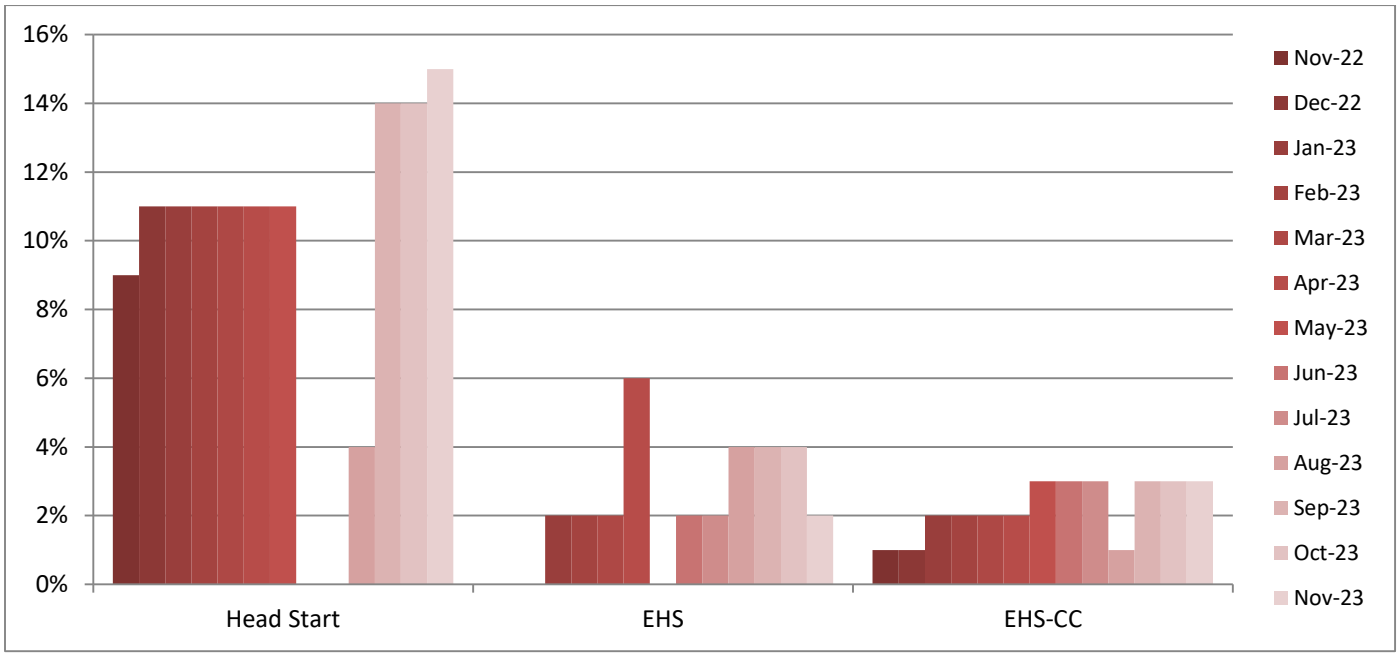
November 2023 EHS-CC Time and Attendance

As of 11/30/23	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	1	18	10		10	8		0		18	67.4%	
ELC-Broken Bow	42		42	26		26	16		0		18	83.3%	
ELC-Hugo	17		17	9	1	10	7		1	11/27/2023	18	73.1%	
ELC-Idabel	38		38	23	1	24	14	3	1	11/29/2023	18	81.6%	This is not an actual drop. Transferred to Learning Tree
Cabbage Patch	31	3	34	14	1	15	19	4	1	11/29/2023	20	92.0%	
The LearningTree	71	3	74	39		39	35	1	0		20	86.6%	
TOTALS	**216**	**7**	**223**	**121**	**3**	**124**	**99**	**8**	**3**			**84.0%**	Actual drop number is 2

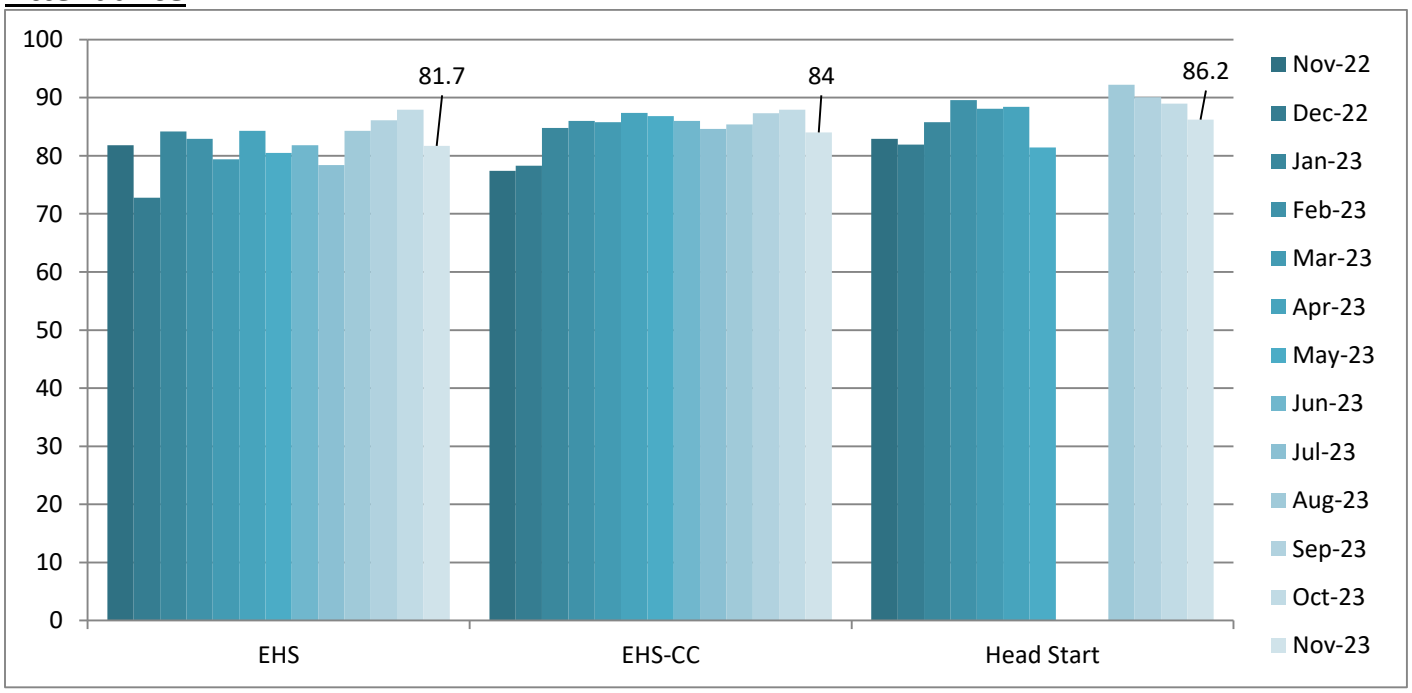
Data Analysis Report Summary
November 2023

Disabilities

IEP/IFSP –

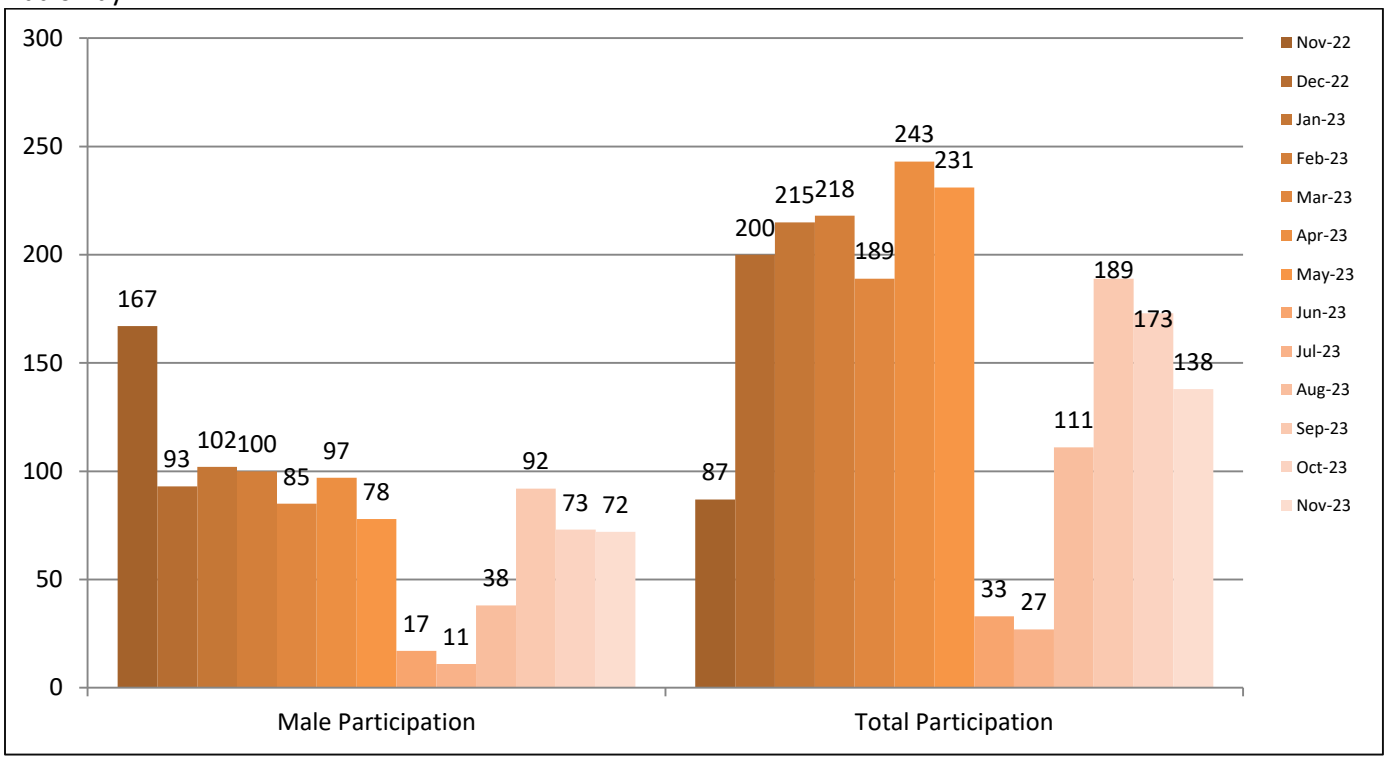


Attendance

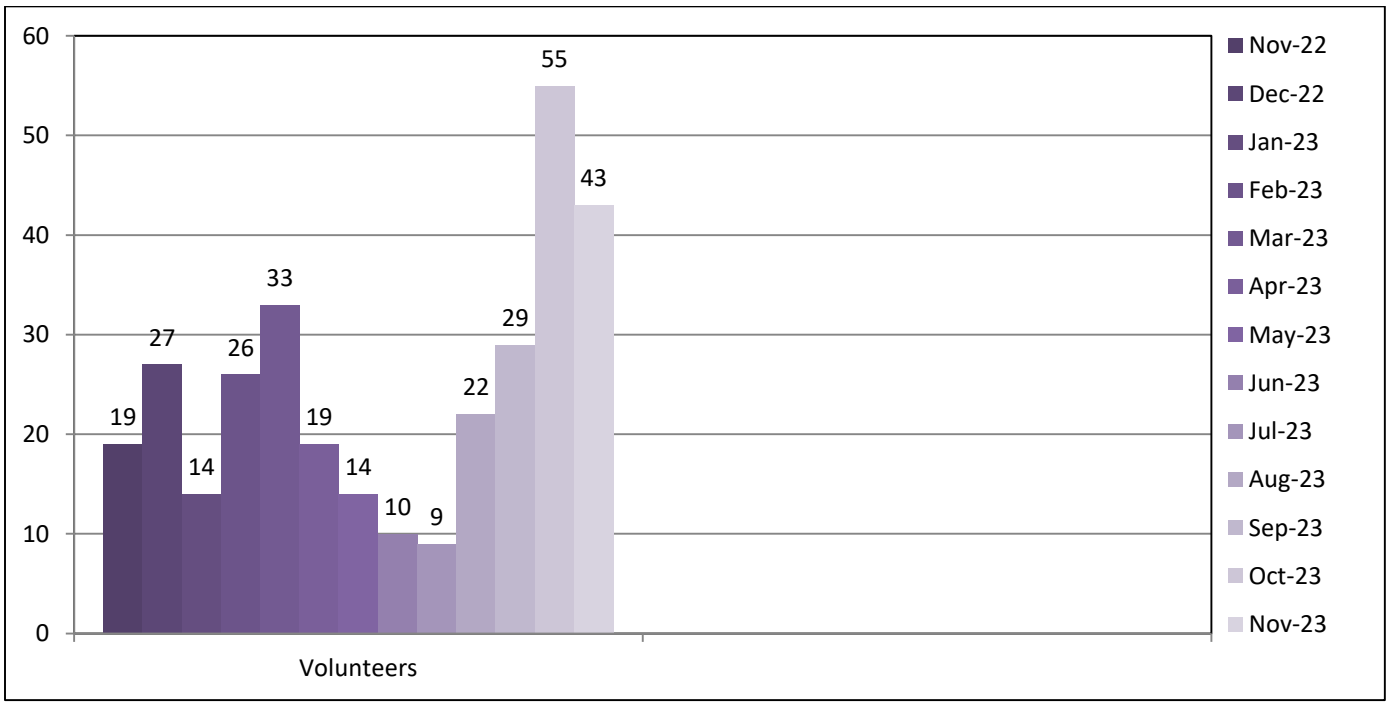


Family & Community Engagement

Dad's Day



Parents Ready to Read



Oklahoma CASA Association, Inc.
P.O. Box 54946, Oklahoma City, OK 73154
Phone (405) 524-8999 • Toll Free (800) 742-2272
www.oklahomacasa.org

To: Local CASA Program BOD
From: Oklahoma CASA
RE: National CASA

December 11, 2023

Dear Board members,

At the request of local CASA program directors and in an effort to ensure consistent communication with their governing bodies, Oklahoma CASA is providing this overview pertaining to the current situation with National CASA and its possible impact in Oklahoma.

This summer, state CASA directors learned that National CASA's funding from the federal Office of Juvenile Justice and Delinquency Prevention (OJJDP) was delayed, impacting grantees throughout the country and National CASA operations. In brief, the impact of these administrative issues between National CASA/GAL and OJJDP as their primary funding source led states to the realization of weaknesses in management, concerns about transparency and the organization's solvency.

These management related issues are separate from state and local CASA programs. Oklahoma CASA and local CASA programs are members of the national organization and adhere to National standards and best practices but are independent organizations, none of which are reliant on the limited funding available through National CASA. And while the issues currently facing National CASA are concerning and disheartening, they should not impact the ability for CASA programs in Oklahoma to continue their advocacy for abused and neglected children.

That being said, a strong national organization and representation at the federal level is essential to the shared mission of CASA/GAL programs across the country. State organizations continue to work in close collaboration as we seek successful resolution, and are actively engaged in concurrent planning should that not be possible.

Oklahoma CASA will continue to remain abreast of the situation and will prepare local programs for a coordinated response, should one be necessary. As always, we will continue to engage and support local programs and staff to maintain the strong network of CASA programs throughout the state of Oklahoma.

Sincerely,

Sheryl Marseilles
Chief Executive Officer
Oklahoma CASA

HUGO, IDABEL AND ANTLERS SERVICE UNITS: RED KETTLE CAMPAIGN 2023

The iconic Salvation Army Red Kettle Campaign began in 1891 by Captain Joseph McFee, a Salvation Army officer who was looking for a way to cover the cost of the community Christmas meal. Recalling his days as a sailor in Liverpool, England, he recreated the "Simpson's Pot", an iron pot where charitable donations were placed by passersby. Captain McFee placed a similar pot at the Oakland Ferry Landing, at the foot of Market Street where it could be seen by all those going to and from the ferry boats. By 1895 the 'kettle' was used by 30 locations along the west coast and by 1897 the campaign was making its mark in east. That year, the kettle effort in Boston and other locations nationwide resulted in 150,000 Christmas dinners for the needy. The tradition continues still today. Sharing your donation at Christmastime helps The Salvation Army care for homeless and needy families, but also helps serve 30 million people through a myriad of other services all year long.

The Antlers, Hugo and Idabel Service Units of the Salvation Army wrapped up their 2023 Red Kettle campaigns around mid-December. Bell ringers volunteered their time in 1.5 hours shifts at locations including WalMart Supercenters in Hugo and Idabel and Pruett's Food in Antlers, Oklahoma.

The local Salvation Army Boards appreciate all who volunteered to ring the bell to raise funds to help families with low-incomes. All donations dropped in the kettles will be used to assist residents of Choctaw, McCurtain or Pushmataha Counties. LIFT CAA organizes the Salvation Army Red Kettle Campaign activities for the Antlers, Hugo and Idabel service units in order to assist families in need. While the International Salvation Army provides a multitude of services for poverty-stricken individuals and families, the local Salvation Army Service Units have primarily provided utility assistance for families in emergency situations.

ANTLERS	HUGO	IDABEL
$1,614.77	$1,369.90	$2,456.28

STALKING AND SEXUAL VIOLENCE

BOTH CRIMES ARE:

PREVALENT
{in the United States }

1 in 6 women
1 in 17 men
will experience stalking in their lifetimes[1]

1 in 5 women
1 in 71 men
will experience rape in their lifetimes[2]

MISUNDERSTOOD AND MINIMIZED

Victims of both of these crimes are frequently **NOT BELIEVED**, told they are **OVERREACTING** and/or **BLAMED** and accused of doing something wrong to have invited the offender's behavior.

PERPETRATED BY SOMEONE THE VICTIM KNOWS

75% of stalking victims know their perpetrators[3]

80% of sexual assault victims know their perpetrators[4]

UNDERREPORTED { to police }

Fewer than **40%** of stalking cases are reported[5]

Fewer than **25%** of sexual assault cases are reported[6]

TRAUMATIC { for victims and survivors }

13% of sexual assault victims lost time from work[8]

Over **12%** of stalking victims lost time from work[5]

Victims of stalking and sexual assault suffer both acute and long-lasting trauma. Stalking victims and survivors suffer much higher rates of depression, anxiety, insomnia, and social dysfunction than people in the general population.[7]

REFERENCES

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