



LIFT

Community Action Agency, Inc.

Board of Directors Meeting

MAY 14, 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, May 14, 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.** Consideration, Discussion, and Vote to Accept Colby Bryant as Appointed Representative for Hugo Rotary Club, a Private Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2024*)
- D.** Appointment of Mentor for New Board Member (*Organizational Standard 5.7*)
- E.** Finance/Audit/Loan Committee Report

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unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.*

- F.** Consideration, Discussion, and Vote to Approve March 2024 Regular Meeting Minutes (OS 5.5)
- G.** Consideration, Discussion, and Vote to Approve February 2024 and March 2024 Financial Reports; Distribution of April 2024 Financials for June 2024 Consideration and Vote (OS 8.7)
- H.** Consider Submission of Resolutions/Grant Applications, Vote to Approve – **\$4,617,019**
 - 1. Fathers Forward Initiative Bid (Choctaw County) to Oklahoma Department of Human Services - **\$900,000**
 - 2. Fathers Forward Initiative Bid (McCurtain County to Oklahoma DHS - **\$900,000**
 - 3. Fathers Forward Initiative Bid (Pushmataha County) to Oklahoma DHS - **\$900,000**
 - 4. Know and Grow Oklahoma: Building Resilient Children, Families & Communities – Family Resource Center Grant Application to Potts Family Foundation - **\$263,497**
 - 5. FY 2024 Community Services Block Grant Application (3rd Allocation) to Oklahoma Department of Commerce/Community Development - **\$37,275**
 - 6. Week of the Young Child Grant Applications (Early Learning Centers) to Choctaw Nation of Oklahoma, Child Care Assistance Program - **\$2,000**
 - 7. 2024 Grant Application (Innovation and Pilot Project Funding) to Potts Family Foundation - **\$34,247**
 - 8. FY 2024 Rural Domestic Violence, Dating Violence, Sexual Assault, and Stalking Program Grant Application to Office on Violence Against Women - **\$815,000**
 - 9. FY 2024 Second Chance Act Community-Based Reentry Program Grant Application to Bureau of Justice Assistance - **\$750,000**
 - 10. Signature Cause Grant Application (Retired and Senior Volunteer Program) to International Paper Foundation - **\$15,000**

- I. Consider Acceptance of Grants/Contracts/Awards, Vote to Approve – **\$5,715,940.07**
 - 1. RSVP Donation from Pushmataha County Historical Society - **\$500**
 - 2. Court Appointed Special Advocates Donation from Pushmataha Co. Historical Society - **\$500**
 - 3. Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Award (Extension) from Health Resources and Services Administration - **\$95,343**
 - 4. Child Care Stabilization Grant Program Awards (Year 3/Quarter 3, Early Learning Centers) from Choctaw Nation of Oklahoma - **\$32,000**
 - 5. FY 2024 CSBG Award (3rd Allocation) from ODOC - **\$37,275** (*Total Awarded: \$119,254*)
 - 6. 2024 Community Grants Program Award from Carolyn Watson Rural Oklahoma Community Foundation - **\$5,000**
 - 7. HOME Investment Partnerships Program Grant Award (Rental New Construction) from Oklahoma Housing Finance Agency - **\$750,000**
 - 8. FY 2024 Head Start/Early Head Start Program Grant Award (New/Baseline, Balance of Funds) from Administration for Children and Families - **\$2,254,969** (*Total Awarded: \$4,509,940*)
 - 9. FY 2024 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Award (Year 11) from HRSA - **\$ 1,008,333**
 - 10. Technical and Management Assistance Contract Award – Region 2 (Option Year 1) from U.S. Department of Agriculture, Rural Development - **\$1,531,020.07**
 - 11. NeighborWorks Week Grant Award from NeighborWorks® America - **\$1,000**
- J. Consideration, Discussion, and Vote to Approve Submission of FY 2023 Disability Waiver Request for the Early Head Start-Child Care Partnership Program to the Office of Head Start
- K. Consideration, Discussion, and Vote to Approve Submission of Change in Scope – Enrollment Reduction Amendment Application for the EHS-Child Care Program to the Office of Head Start
- L. Consideration, Discussion, and Vote to Approve Submission of LIFT CAA 403(b) Retirement Plan Form 5500 (*Plan Year 2022, Period: 8/1/2022–7/31/2023*)
- M. Consideration, Discussion, and Vote to Re-Adopt a Resolution to Establish a Formal Process for Low-Income Beneficiaries to Advise LIFT CAA as a Community Housing Development Organization in All Decisions Regarding the Design, Siting, Development, and Management of HOME-Assisted Affordable Housing Projects
- N. Consideration, Discussion, and Vote to Approve or Disapprove Resolution for Schools and Libraries Universal Services (E-Rate) for 2024-25 (*This Resolution authorizes filing of the Form 471 applications for funding year 2024-25 and the payment of the applicant's share upon approval of funding and receipt of services.*)
- O. Consideration, Discussion, and Vote to Approve EHS-Child Care Program 2024-2025 Training and Technical Assistance Plan
- P. Consideration, Discussion, and Vote to Approve Signing of Proclamation Recognizing May 2024 as Community Action Month
- Q. Consideration, Discussion, and Vote to Approve Signing of Proclamation Recognizing June 1-8, 2024 as NeighborWorks Week
- R. Consideration, Discussion, and Vote to Approve HS/EHS/EHS-CC 2023-2028 Strategic Plan

- S.** NeighborWorks® America PROMPT Review Debrief Presentation
- T.** 2023-2024 Self-Assessment Process Overview for HS/EHS/EHS-CC Programs (OS 5.7 & 5.9)
- U.** HS/EHS/EHS-CC Program Updates: Cost-of-Living Adjustments, Change in Scope Request
- V.** Board Training (OS 5.7):
- Results-Oriented Management and Accountability (ROMA) Training
 - LIFT CAA History, Mission, Vision, and Values
 - History and Future of Community Action/Anti-Poverty Work
 - Statutory and Regulatory Requirements
 - CAA Contractor Implementation Manual – Req. 113 & Updates
- W.** Board Giving Report (OS 5.7)
- X.** Board Training/Programmatic Report: HS/EHS/EHS-CC Child Outcomes/Assessment Results for Fall/Winter 2023-2024 (OS 5.7 & 5.9)
- Y.** Board Training/Programmatic Report: Quarterly Housing Production as Reported to NeighborWorks® America (OS 5.7 & 5.9)
- Z.** Policy Council Report (OS 2.1 & 5.9)
- AA.** Recognition of April 2024 Employee of the Month:
Johnny Driggers, Energy Auditor – Weatherization Program
- BB.** Recognition of May 2024 Employee of the Month:
Alex Wallis, Administrative Support – Work Ready Idabel
- CC.** Other Reports/Announcements/Correspondence: HS/EHS/EHS-CC Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); ODOC Comprehensive Monitoring Notice; Opioid Affected Youth Initiative Site Visit Report; LIFT Community Corral Event (OS 5.9)
- DD.** 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*)
- EE.** 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
March 12, 2024
Head Start Administration Office - Hugo, Oklahoma

The Board of Directors of LIFT Community Action Agency, Inc. met in a regular meeting session on Tuesday, March 12, 2024 at 10:07 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, 9 absent). The following Board Members were present at the meeting site: Brad Burgett, Kevin Cory, Kristi Graham, David Hawkins, Andrea Henkel, Sharon Johnson, Vickie Leathers, Jeffery Lucas, Kara Maness, Sandra Meeks, Carolyn Pool, David Smith, William Smith, Consuelo Splawn, Jim Bob Sullivan, and Debra Williams. The following members were absent: Tami Barnes, Tiffany Brockway, Brent Franks, Patsy Guess, Jordan Hill, Jia Johnson, Leah Thomas, Vicky Wade, and Craig Young. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Michelle Pulliam, Jeannie McMillin, Rhonda Teague, Macy Self, Darla Galyon, Johnny Moffitt, Jordan Mack, Stella Dennis, Mattie McKee, Raegan Baker, Sarah Wallace, Amber Duncan, and Rebecca (Reynolds) Porter. 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.

Rebecca (Reynolds) Porter, Executive Director, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on March 12, 2024 at 9:10 a.m. The Committee received a status report on all active loans by new Loan Officer, Wade Scott. There were no new loan applications to present. The Committee voted to recommend full Board approval of the agency's Financial Reports for January 2024. The Committee was presented with the February 2024 Financial Reports and Meeting Minutes. It was noted the Non-Federal Cash Statement Building Fund Balance was listed incorrectly as a negative number on the Raymond Gary State Park Financial. The Committee was notified that Saunders and Associates were currently on-site conducting the 2023 Agency Audit. The Committee was also provided with the

audit proposals for review in order to decide the new auditor at the next meeting. There were no property updates.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the February 2024 Regular Meeting Minutes and the January 2024 Financial Reports; the February 2024 Financials were distributed for consideration and vote at the April 2024 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Kara Maness and seconded by Debra Williams to approve the February 2024 Regular Meeting Minutes and the January 2024 Financial Reports. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Items D & E).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

1. Housing Stability Program Application to Oklahoma Housing Finance Agency in the amount of \$1,174,110; if awarded, LIFT will use these funds to construct five single-family homes in Choctaw County. All revenue generated from the sale of these home will provide resources for ongoing housing development.
2. FY 2025 Section 5311 – Formula Grants for Rural Areas Program Application to Oklahoma Department of Transportation in the amount of \$452,200 and signing of the Authorizing Resolution; if awarded, these funds will be applied to the expenses of operating the Transit Program in Choctaw, McCurtain, and Pushmataha Counties, with a program year of 10/1/2024 – 9/30/2025.
3. SFY 2025 Older Americans Act Title III KEDDO Area Agency on Aging Grant Application to Kiamichi Economic Development District of Oklahoma in the amount of \$57,276; if awarded, these funds will be used to administer and operate a Title III program to provide public transportation for eligible participants (age 60 years or older) residing in Choctaw, McCurtain, and Pushmataha Counties within the KEDDO district.
4. FY 2024 NeighborWorks Week Grant Application to NeighborWorks® America in the amount of \$1,000; if awarded, these funds will be used to engage in a social media campaign and email marketing to increase awareness of the NeighborWorks philosophy and agency's partnership as well as other activities during NeighborWorks Week (June 1–8, 2024).

After discussion and Board Member input with regards to the applications presented, a motion was made by Jim Bob Sullivan and seconded by Brad Burgett to approve the submission of resolutions and/or grant applications in the amount of \$1,684,586 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item F).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

1. FY 2023/2024 Improvement Grants Award from Choctaw Nation of Oklahoma, Child Care Assistance Program in the amount of \$8,800; these funds will be used to purchase playground and classroom equipment as well as other supplies for the Early Learning Centers in Antlers (\$2,180), Broken Bow (\$2,240), Hugo (\$2,240), and Idabel (\$2,140).

The Improvement Grants are intended to improve the health, safety, or quality of the child care facility.

2. Healthy Start Cuff Kit Pilot Project Award (2023 Extension) from National Institute for Children's Health Quality/Preeclampsia Foundation in the amount of \$2,500; as part of the pilot project, the LIFT Healthy Start Program was given 100 Blood Pressure Cuff Kits to distribute to pregnant and newly postpartum mothers in the community who are at an increased risk for preeclampsia. The program has dedicated staff support to oversee the pilot implementation, including distribution, data collection, and reporting. This extension funding will help support project efforts.
3. Mentoring+ Project Subgrant Award from Youth Collaboratory in the amount of \$100,000; these funds will be used for the provision of mentoring program services for a total of 75 youth (ages 6-17) during the contract period of March 1, 2024 to May 30, 2026.
4. FY 2024 Retired and Senior Volunteer Program Grant Award (Continuation, Year 3) from AmeriCorps in the amount of \$64,299; funding will be used to support program operations within the third year of the three-year grant cycle.
5. FY 2024 Community Services Block Grant Award (1st & 2nd Allocations) from Oklahoma Department of Commerce/Community Development in the amount of \$81,979; this funding will be used for operational support of agency programs.
6. HOME Investment Partnerships Program Grant Award (Community Housing Development Organization Operating) from OHFA in the amount of \$50,000; these funds will provide CHDO operating support for staff salaries, travel, and administrative costs associated with the construction of housing units.

A motion was made by Brad Burgett and seconded by Kara Maness to approve acceptance of grants, contracts, and awards in the amount of \$307,578 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item G).

Darla Galyon, Head Start/Early Head Start/EHS-Child Care Program Director, requested the Board's consideration, discussion, and vote to approve submission of the FY 2024 Early Head Start-Child Care Partnership Grant Application (New/Baseline) and Non-Federal Share Waiver Request to the Office of Head Start. Galyon explained that, if awarded, funding would provide support for program operations in the amount of \$2,173,882 as well as \$42,863 for the provision of training/technical assistance for the EHS-CC Program for a period of one year, serving 120 infants and toddlers in partnership with six area child care centers. The child care centers include the Early Learning Centers located in Antlers, Broken Bow, Hugo, and Idabel, Cabbage Patch Daycare and The Learning Tree. The total amount requested would be \$2,216,745, for the funding period of 8/1/2024 – 7/31/2025. Included with the application will be a request for a Waiver of the Non-Federal Share associated with the Federal Request in the amount of \$554,186.25. The Board of Directors discussed the request, reviewed the budget, and provided input regarding the application. A motion was made by David Smith and seconded by Andrea Henkel to approve submission of the FY 2024 Early Head Start-Child Care Partnership Grant Application (New/Baseline) and Non-Federal Share Waiver Request to the Office of Head Start. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration, discussion, and vote to approve the revised LIFT CAA Board of Directors Regular Meeting Dates for 2024. Porter explained that LIFT's offices will be closed on April 8-9, 2024 as a precaution in light of the solar eclipse taking place on April 8th and the large influx of people expected in the area as a result. Because the agency offices will be closed, the Board Meeting scheduled for Tuesday, April 9, 2024 would need to be cancelled as well. The only change to the revised schedule of regular meeting dates proposed would be the cancellation of the April 9, 2024 meeting, which would not be rescheduled. If approved, the next regularly-scheduled meeting will be held on Tuesday, May 14, 2024 and will continue as planned according to the schedule of meetings as filed with the Choctaw County Clerk on October 11, 2023. A motion was made by Andrea Henkel and seconded by Brad Burgett to approve the revised LIFT CAA Board of Directors Regular Meeting Dates for 2024 as proposed. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I).

Jeannie McMillin, Transit Director, requested the Board's consideration, discussion, and vote to approve the revised LIFT Transit Vehicle Maintenance and Drug and Alcohol Policies. McMillin explained that the proposed revisions to the Vehicle Maintenance Policy reflect changes to designated personnel for various maintenance processes/operations. These changes have been noted (via highlight or strikethrough) in the documentation included in the Meeting Packet. The Service Schedule table (by mileage frequency) included in Attachment B is also being proposed for removal from the policy, to be replaced with the maintenance schedule information for each make/model of vehicle separated by year, derived from the respective Owner's Manuals. For the Drug and Alcohol Policy, the only changes proposed are on page 14, and concerns the Medical Review Officer name, address, and telephone number. The MRO reviews all the tests and makes the determination of a negative or positive result. LIFT Transit's third-party manager for the program selected a new MRO in January 2024, which warranted the change to the policy in order to reflect the new MRO being utilized and corresponding contact information. A motion was made by Kara Maness and seconded by Brad Burgett to approve the revised LIFT Transit Vehicle Maintenance and Drug and Alcohol Policies as proposed. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item J).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration, discussion, and vote to approve the signing of a Proclamation recognizing April as Fair Housing Month. National Fair Housing Month celebrates the passage of the Fair Housing Act in April 1968, a national law that prohibits discrimination in the sale, rental and financing of housing based on race, color, national origin, religion, and gender. The Act was later amended to include protections for people with disabilities and families with children. National Fair Housing Month works to increase efforts to end housing discrimination and raises awareness of fair housing rights. A motion was made by David Smith and seconded by Debra Williams to approve the signing of a Proclamation recognizing April as Fair Housing Month. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item K).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to enter into Executive Session to review and discuss the following item in accordance with Oklahoma Statute Title 25 § 307(B)(1): Mid-Year Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. A motion was made by Jim Bob Sullivan and seconded by

Brad Burgett to enter into Executive Session to review and discuss the Mid-Year Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. The roll call vote was as follows: Yes 15; No 1; Abstain 0. The motion carried. The Voting Record is attached (Item L). LIFT CAA staff/visitors then exited the room; the Board of Directors entered into Executive Session at 10:29 a.m.

After holding Executive Session, LIFT CAA staff/visitors were brought back into the meeting room. David Hawkins, Chairman, then requested the Board's consideration, discussion, and vote to adjourn out of Executive Session and the regular Board Meeting be reconvened. A motion was made by Andrea Henkel and seconded by Jim Bob Sullivan to adjourn out of Executive Session and the regular Board Meeting be reconvened. The Roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item M). The Board of Directors adjourned out of Executive Session at 10:44 a.m. No action was taken; the Executive Session was for informational purposes only.

Rebecca (Reynolds) Porter, Executive Director, provided a Board Training (Organizational Standard 5.7) over Board Recruitment and Retention as well as Low-Income Participation (in Board activities and Members), with regards to Organizational Standard 1.1.

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 eleventh meeting, held on March 12, 2024 (prior to the Board Meeting), Advisory Council members were briefed on the service results so far, as well as the new KEDDO funding application that is due on April 1, 2024. The Advisory Council appointed member Andrea Henkel to serve as Vice-Chair. Advisory Council members were also asked to report on any new or additional identified gaps in transportation needs in their communities; no such gaps were reported.

Andrea Henkel, Board Member, provided the Board Giving Report (Organizational Standard 5.7). Henkel reviewed the Board Giving Policy and Procedure with the Board. Achieving 100% of giving by the Board 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 2024, the agency is eligible to apply for funding in 2025.

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided the Board with the Policy Council Report for the February 20, 2024 meeting (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized Sarah Wallace (Family Advocate, EHS-Child Care Program) as the March 2024 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized the following Service Award recipients: Five Years – Raegan Baker (Care Coordinator, Healthy Start Program); Ten Years – Ashley Gaddy (Outreach Specialist, Head Start/EHS/EHS-Child Care Programs); Fifteen Years – Jordan Mack (Assistant Director, Head Start/EHS/EHS-Child Care Programs); and Thirty Years – Rebecca (Reynolds) Porter (Executive Director, Administration).

Other Reports/Announcements/Correspondence were presented as follows: Head Start/Early Head Start/EHS-Child Care Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Second Chance Reentry Program Post-Monitoring Letter; Sexual Assault Awareness and Prevention Month; Child Abuse Prevention Month; and Head Start/EHS/EHS-CC Community Assessment survey (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 15; No 0; Abstain 0. The motion carried. Voting record is attached (Item V).

The Regular Meeting adjourned at 11:12 a.m.

Brad Burgett, Secretary/Treasurer

10:07

March 12, 2024		Present	Absent	DIE			F			G			H			I		
				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	Jeffery Lucas	✓		✓			✓			✓			✓			✓		
14	Kara Maness	✓		✓			✓			✓			✓			✓		
15	Sandra Meeks	✓		✓			✓			✓			✓			✓		
16	Carolyn Pool	✓		✓			✓			✓			✓			✓		
17	David Smith	✓		✓			✓			✓			✓			✓		
18	William Smith	✓		✓			✓			✓			✓			✓		
19	Consuelo Splawn	✓		✓			✓			✓			✓			✓		
20	Jim Bob Sullivan	✓		✓			✓			✓			✓			✓		
21	Leah Thomas		✓															
22	Vicky Wade		✓															
23	Debra Williams	✓		✓			✓			✓			✓			✓		
24	Craig Young		✓															
25	David Hawkins	✓					✓			✓			✓			✓		
26																		
27																		

10:29/10:44

March 12, 2024		Present	Absent	J			K			L			M			N		
				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	Jeffery Lucas	✓		✓			✓			✓			✓			✓		
14	Kara Maness	✓		✓			✓			✓			✓			✓		
15	Sandra Meeks	✓		✓			✓			✓			✓			✓		
16	Carolyn Pool	✓		✓			✓			✓			✓			✓		
17	David Smith	✓		✓			✓			✓			✓			✓		
18	William Smith	✓		✓			✓				✓		✓			✓		
19	Consuelo Splawn	✓		✓			✓			✓	✓		✓			✓		
20	Jim Bob Sullivan	✓		✓			✓			✓			✓			✓		
21	Leah Thomas		✓															
22	Vicky Wade		✓															
23	Debra Williams	✓		✓			✓			✓			✓			✓		
24	Craig Young		✓															
25	David Hawkins	✓		✓						✓								
26																		
27																		

11:12

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Balance Sheet
End of Apr 2024

FINANCIAL ROW	AMOUNT (AS OF APR 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	\$9,359,882.45	\$9,896,508.98	(\$536,626.53)	-5.42%
1020 - Payroll Account	\$388,863.36	\$356,369.33	\$32,494.03	9.12%
1021 - First United Accounts Payable	(\$8,761.75)	(\$79,467.85)	\$70,706.10	-88.97%
1022 - First United TH Reserve	\$141,909.41	\$139,439.77	\$2,469.64	1.77%
1023 - First United General Escrow	\$73,851.37	\$159,540.20	(\$85,688.83)	-53.71%
1024 - First United Marina License	\$289.69	\$240.82	\$48.87	20.29%
1025 - First United Deposit (PayPal)	\$3,029.73	\$2,115.20	\$914.53	43.24%
1028 - First United Unrestricted Funds CD	\$822,783.89	\$822,783.89	\$0.00	0.00%
1030 - Shamrock Bank - Clayton	\$1,841.70	\$1,835.61	\$6.09	0.33%
1040 - Petty Cash	\$410.00	\$410.00	\$0.00	0.00%
1050 - McCurtain County National Bank	\$70,742.29	\$49,224.53	\$21,517.76	43.71%
1070 - Fund to Fund Allocation Transfers	\$11,121.62	\$0.00	\$11,121.62	0.00%
Total - 1000 - Cash	\$10,865,963.76	\$11,349,000.48	(\$483,036.72)	-4.26%
Total Bank	\$10,865,963.76	\$11,349,000.48	(\$483,036.72)	-4.26%
Accounts Receivable				
1100 - Receivables	\$292,528.83	\$1,898,637.03	(\$1,606,108.20)	-84.59%
1300 - Other receivables				
1320 - Notes/loans receivable	\$334,632.06	\$335,515.82	(\$883.76)	-0.26%
1321 - Loans Receivable from Belmont	\$164,721.48	\$162,809.48	\$1,912.00	1.17%
1322 - Loans Receivable from Clayton	\$203,802.53	\$202,957.53	\$845.00	0.42%
1323 - Loans Receivable rom Kiamichi	\$123,563.90	\$123,563.90	\$0.00	0.00%
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	\$51,909.76	\$51,909.76	\$0.00	0.00%
Total - 1300 - Other receivables	\$1,301,540.66	\$1,299,667.42	\$1,873.24	0.14%
Total Accounts Receivable	\$1,594,069.49	\$3,198,304.45	(\$1,604,234.96)	-50.16%
Other Current Asset				
1400 - Other assets	\$27,017.59	\$51,246.22	(\$24,228.63)	-47.28%
1500 - Investments				
1530 - Property/Lots held for Sale	\$520,721.32	\$520,721.32	\$0.00	0.00%
1599 - Undeposited Funds	\$2,721.15	\$2,621.15	\$100.00	3.82%
Total - 1500 - Investments	\$523,442.47	\$523,342.47	\$100.00	0.02%
NS097 - Interfund Due to /Due from	(\$0.01)	(\$0.01)	\$0.00	0.00%
Payroll Float	\$1,459.05	\$0.00	\$1,459.05	0.00%
Total Other Current Asset	\$551,919.10	\$574,588.68	(\$22,669.58)	-3.95%
Total Current Assets	\$13,011,952.35	\$15,121,893.61	(\$2,109,941.26)	-13.95%
Fixed Assets				

FINANCIAL ROW	AMOUNT (AS OF APR 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	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				
1725 - Accum deprec - building	(\$5,594,074.69)	(\$5,594,074.69)	\$0.00	0.00%
1735 - Accum amort - leasehold improvements	(\$2,053,452.27)	(\$2,053,452.27)	\$0.00	0.00%
1740 - Accum. Amortization Leases	(\$35,447.22)	(\$35,447.22)	\$0.00	0.00%
Total - 1700 - Accum deprec - fixed operating assets	(\$7,682,974.18)	(\$7,682,974.18)	\$0.00	0.00%
Total Fixed Assets	\$6,160,087.85	\$6,160,087.85	\$0.00	0.00%
Other Assets				
1800 - Other Assets	\$49,275.53	\$49,288.52	(\$12.99)	-0.03%
Total Other Assets	\$49,275.53	\$49,288.52	(\$12.99)	-0.03%
Total ASSETS	\$19,221,315.73	\$21,331,269.98	(\$2,109,954.25)	-9.89%
Liabilities & Equity				
Current Liabilities				
Accounts Payable	(\$11,743.47)	(\$19,476.56)	\$7,733.09	-39.70%
Other Current Liability	\$1,100,801.97	\$1,383,657.05	(\$282,855.08)	-20.44%
Total Current Liabilities	\$1,089,058.50	\$1,364,180.49	(\$275,121.99)	-20.17%
Long Term Liabilities				
2700 - Long-term notes & loans payable				
2770 - Long-term liabilities - Mower Loan	\$2,926.86	\$4,100.28	(\$1,173.42)	-28.62%
2780 - Lease liability	\$34,139.72	\$34,139.72	\$0.00	0.00%
Total - 2700 - Long-term notes & loans payable	\$37,066.58	\$38,240.00	(\$1,173.42)	-3.07%
Total Long Term Liabilities	\$37,066.58	\$38,240.00	(\$1,173.42)	-3.07%
Equity	\$18,095,190.65	\$19,928,849.49	(\$1,833,658.84)	-9.20%
Total Liabilities & Equity	\$19,221,315.73	\$21,331,269.98	(\$2,109,954.25)	-9.89%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Income Statement
From Jan 2024 to Apr 2024

FINANCIAL ROW	AMOUNT (JAN 2024 - APR 2024)	COMPARATIVE AMOUNT (JAN 2023 - ADJUST 2023)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$11,904.69	\$42,867.82	(\$30,963.13)	-72.23%
4100 - Inkind Revenue	\$271,847.99	\$1,268,433.18	(\$996,585.19)	-78.57%
4200 - Miscellaneous Revenue	\$321,604.59	\$3,930,080.84	(\$3,608,476.25)	-91.82%
4400 - State Revenue	\$552,824.79	\$1,225,307.21	(\$672,482.42)	-54.88%
4500 - Federal Revenue	\$4,066,372.49	\$16,945,899.72	(\$12,879,527.23)	-76.00%
4900 - Recoveries from Programs	\$1,261,541.63	\$3,631,244.42	(\$2,369,702.79)	-65.26%
5000 - Rental Revenue	\$246,644.32	\$633,708.00	(\$387,063.68)	-61.08%
5100 - Program Fee Revenue	\$440,348.95	\$1,741,876.31	(\$1,301,527.36)	-74.72%
5300 - Interest and Dividends	\$108,631.39	\$177,044.67	(\$68,413.28)	-38.64%
5400 - Revenue from other sources	\$306,862.43	\$1,852,470.46	(\$1,545,608.03)	-83.43%
5800 - Special Event Expense	\$2,850.00	\$8,795.33	(\$5,945.33)	-67.60%
Total - Income	\$7,591,433.27	\$31,457,727.96	(\$23,866,294.69)	-75.87%
Cost Of Sales				
8000 - Cost of Goods Sold	\$614.13	\$169.31	\$444.82	262.73%
Total - Cost Of Sales	\$614.13	\$169.31	\$444.82	262.73%
Gross Profit	\$7,590,819.14	\$31,457,558.65	(\$23,866,739.51)	-75.87%
Expense				
7000 - Grants, contracts, & direct assistance	\$302,879.35	\$1,785,141.15	(\$1,482,261.80)	-83.03%
7200 - Salaries & related expenses	\$3,815,412.50	\$11,593,783.96	(\$7,778,371.46)	-67.09%
7300 - Indirect Cost Pool Expense	\$677,013.46	\$1,908,665.77	(\$1,231,652.31)	-64.53%
7500 - Contract/Consultant Services	\$594,978.58	\$1,816,027.49	(\$1,221,048.91)	-67.24%
8100 - Non personnel expenses	\$443,048.81	\$1,177,166.91	(\$734,118.10)	-62.36%
8200 - Facility & equipment expenses	\$841,228.78	\$2,864,514.83	(\$2,023,286.05)	-70.63%
8300 - Travel & meetings expenses	\$195,775.93	\$635,567.00	(\$439,791.07)	-69.20%
8400 - Insurance Expense	\$1,090,614.49	\$2,052,548.78	(\$961,934.29)	-46.87%
8600 - Business expenses	\$918.50	\$8,063.62	(\$7,145.12)	-88.61%
8700 - Food Expenses	\$510,399.86	\$1,692,339.37	(\$1,181,939.51)	-69.84%
8800 - In-Kind Expenses	\$271,847.99	\$1,268,433.18	(\$996,585.19)	-78.57%
Total - Expense	\$8,744,118.25	\$26,802,252.06	(\$18,058,133.81)	-67.38%
Net Ordinary Income	(\$1,153,299.11)	\$4,655,306.59	(\$5,808,605.70)	-124.77%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$693,046.93	\$1,717,814.59	(\$1,024,767.66)	-59.66%
Total - Other Expense	\$693,046.93	\$1,717,814.59	(\$1,024,767.66)	-59.66%
Net Other Income	(\$693,046.93)	(\$1,717,814.59)	\$1,024,767.66	-59.66%
Net Income	(\$1,846,346.04)	\$2,937,492.00	(\$4,783,838.04)	-162.85%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Financial Position
End of Apr 2024

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	\$9,359,882.45
1020 - Payroll Account	\$388,863.36
1021 - First United Accounts Payable	(\$8,761.75)
1022 - First United TH Reserve	\$141,909.41
1023 - First United General Escrow	\$73,851.37
1024 - First United Marina License	\$289.69
1025 - First United Deposit (PayPal)	\$3,029.73
1028 - First United Unrestricted Funds CD	\$822,783.89
1030 - Shamrock Bank - Clayton	\$1,841.70
1040 - Petty Cash	\$410.00
1050 - McCurtain County National Bank	\$70,742.29
1070 - Fund to Fund Allocation Transfers	\$11,121.62
Total - 1000 - Cash	\$10,865,963.76
Total Bank	\$10,865,963.76
Accounts Receivable	
1100 - Receivables	
1110 - Accounts Receivable	\$243,942.16
1120 - Due From (A/R)	\$38,312.43
Total - 1100 - Receivables	\$282,254.59
1300 - Other receivables	
1320 - Notes/loans receivable	\$334,632.06
1321 - Loans Receivable from Belmont	\$164,721.48
1322 - Loans Receivable from Clayton	\$203,802.53
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	\$51,909.76
Total - 1300 - Other receivables	\$1,301,540.66
Total Accounts Receivable	\$1,583,795.25
Other Current Asset	
1400 - Other assets	
1450 - Prepaid Expenses	\$24,618.06
1465 - Advances Paid	\$2,399.53
Total - 1400 - Other assets	\$27,017.59
1500 - Investments	
1530 - Property/Lots held for Sale	\$520,721.32
1599 - Undeposited Funds	\$2,721.15
Total - 1500 - Investments	\$523,442.47
NS097 - Interfund Due to /Due from	(\$0.01)
Payroll Float	\$1,459.05
Total Other Current Asset	\$551,919.10
Total Current Assets	\$13,001,678.11
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

FINANCIAL ROW	AMOUNT
1650 - Vehicles	\$4,000,373.21
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)
1740 - Accum. Amortization Leases	(\$35,447.22)
Total - 1700 - Accum deprec - fixed operating assets	(\$7,682,974.18)
Total Fixed Assets	\$6,160,087.85
Other Assets	
1800 - Other Assets	
1810 - Right to Use Asset - Leases	\$49,288.52
1950 - State Dated Payables	(\$12.99)
Total - 1800 - Other Assets	\$49,275.53
Total Other Assets	\$49,275.53
Total ASSETS	\$19,211,041.49
Liabilities & Equity	
Current Liabilities	
Accounts Payable	
2000 - Payables	
2010 - AP Accrued monthly	(\$9,330.51)
Total - 2000 - Payables	(\$9,330.51)
Total Accounts Payable	(\$9,330.51)
Other Current Liability	
2100 - Accrued liabilities	
2105 - Accrued Expense Payables	\$303,842.92
2110 - Wages Payable	\$352,669.53
2120 - Accrued Employee Benefits	\$288,871.86
2130 - Accrued payroll taxes	\$28,989.34
2135 - Indirect Payable	\$76,297.76
2150 - Home Loan Escrow Accounts	\$411.51
2160 - Due to (Liab)	\$27,995.61
2180 - Accrued Payroll Deductions	(\$7,567.06)
Total - 2100 - Accrued liabilities	\$1,071,511.47
2400 - Refundable Advances	
2450 - Apartment Sec Deposits Payable	\$28,985.50
2455 - Sales Taxes Payable	\$305.00
Total - 2400 - Refundable Advances	\$29,290.50
Total Other Current Liability	\$1,100,801.97
Total Current Liabilities	\$1,091,471.46
Long Term Liabilities	
2700 - Long-term notes & loans payable	
2770 - Long-term liabilities - Mower Loan	\$2,926.86
2780 - Lease liability	\$34,139.72
Total - 2700 - Long-term notes & loans payable	\$37,066.58
Total Long Term Liabilities	\$37,066.58
Equity	
3000 - Net Assets	(\$12,712.37)
Retained Earnings	\$19,941,561.86
Net Income	(\$1,846,346.04)
Total Equity	\$18,082,503.45
Total Liabilities & Equity	\$19,211,041.49

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Functional Expense
From Jan 2024 to Apr 2024

FINANCIAL ROW	- UNASSIGNED Amount	CAPITAL Amount	FUNDRAISING Amount	MANAGEMENT & GENERAL (ADMIN) Amount	OTHER Amount	PROGRAM SERVICES Amount	TOTAL Amount
Operating Activities							
Net Income	(\$2,250,064.89)	(\$29,077.76)	\$739.39	(\$34,182.96)	\$252.47	\$465,987.71	(\$1,846,346.04)
Adjustments to Net Income							
Accounts Receivable	\$1,413,242.96	\$883.76	\$0.00	\$198,282.73	\$0.00	\$2,099.75	\$1,614,509.20
Other Current Asset	\$279,938.09	\$0.00	\$0.00	(\$59,184.96)	\$0.00	(\$197,983.55)	\$22,769.58
Accounts Payable	\$10,185.27	\$0.00	\$0.00	\$0.00	\$0.00	(\$39.22)	\$10,146.05
Sales Tax Payable	\$4,419.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$4,114.00)	\$305.00
Other Current Liabilities	\$335,555.27	\$0.00	\$0.00	(\$184,737.60)	\$0.00	(\$433,977.75)	(\$283,160.08)
Total Adjustments to Net Income	\$2,043,340.59	\$883.76	\$0.00	(\$45,639.83)	\$0.00	(\$634,014.77)	\$1,364,569.75
Total Operating Activities	(\$206,724.30)	(\$28,194.00)	\$739.39	(\$79,822.79)	\$252.47	(\$168,027.06)	(\$481,776.29)
Investing Activities							
Other Asset	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12.99	\$12.99
Total Investing Activities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12.99	\$12.99
Financing Activities							
Long Term Liabilities	(\$1,173.42)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$1,173.42)
Total Financing Activities	(\$1,173.42)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$1,173.42)
Net Change in Cash for Period	(\$207,897.72)	(\$28,194.00)	\$739.39	(\$79,822.79)	\$252.47	(\$168,014.07)	(\$482,936.72)
Cash at Beginning of Period	\$21,701,778.63	(\$16,525.67)	\$964.22	(\$8,901,843.41)	\$0.00	(\$1,432,752.14)	\$11,351,621.63
Cash at End of Period	\$21,493,880.91	(\$44,719.67)	\$1,703.61	(\$8,981,666.20)	\$252.47	(\$1,600,766.21)	\$10,868,684.91

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Cash Flow
From Jan 2024 to Apr 2024

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$1,846,346.04)
Adjustments to Net Income	
Accounts Receivable	\$1,614,509.20
Other Current Asset	\$22,769.58
Accounts Payable	\$10,146.05
Sales Tax Payable	\$305.00
Other Current Liabilities	(\$283,160.08)
Total Adjustments to Net Income	\$1,364,569.75
Total Operating Activities	(\$481,776.29)
Investing Activities	
Other Asset	\$12.99
Total Investing Activities	\$12.99
Financing Activities	
Long Term Liabilities	(\$1,173.42)
Total Financing Activities	(\$1,173.42)
Net Change in Cash for Period	(\$482,936.72)
Cash at Beginning of Period	\$11,351,621.63
Cash at End of Period	\$10,868,684.91

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Activity
From Jan 2024 to Apr 2024
Options: Activity Only

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$1,846,346.04)
Adjustments to Net Income	
Accounts Receivable	\$1,614,509.20
Other Current Asset	\$22,769.58
Accounts Payable	\$10,146.05
Sales Tax Payable	\$305.00
Other Current Liabilities	(\$283,160.08)
Total Adjustments to Net Income	\$1,364,569.75
Total Operating Activities	(\$481,776.29)
Investing Activities	
Other Asset	\$12.99
Total Investing Activities	\$12.99
Financing Activities	
Long Term Liabilities	(\$1,173.42)
Total Financing Activities	(\$1,173.42)
Net Change in Cash for Period	(\$482,936.72)
Cash at Beginning of Period	\$11,351,621.63
Cash at End of Period	\$10,868,684.91

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Revenue Stream Distribution by Month
From Jan 2024 to Apr 2024

Monthly distribution of Revenue by Revenue Type and Subtype

REVENUE STREAM	JANUARY 2024	FEBRUARY 2024	MARCH 2024	APRIL 2024	TOTAL
Federal Grants	\$117,217.36	\$1,260,812.63	\$1,081,246.59	\$854,609.48	\$3,313,886.06
Recoveries	\$230,807.48	\$385,947.94	\$327,432.04	\$343,613.45	\$1,287,800.91
Federal Pass Through	\$58,988.22	\$289,093.02	\$383,252.19	\$40,461.84	\$771,795.27
State Contracts	\$306,224.18	\$14,188.85	\$78,557.56	\$64,982.44	\$463,953.03
Non Federal	\$55,099.49	\$71,588.39	\$55,383.46	\$245,800.76	\$427,872.10
Federal Contract		\$109,235.23	\$235,792.08		\$345,027.31
Program Revenue	\$98,661.88	\$142,987.95	\$131,664.91	\$194,862.65	\$568,177.39
Federal	\$83,594.49				\$83,594.49
State Pass Through	\$13,330.75	\$74,577.70	\$24,772.96	\$8,597.32	\$121,278.73
Transit Contract	\$26,604.08	\$15,660.35	\$25,742.51	\$25,570.35	\$93,577.29
Apartment Revenue	\$16,589.00	\$16,589.00	\$16,589.00	\$11,630.00	\$61,397.00
State Grants	\$309.60	\$8,524.73	\$8,432.42	\$1,208.65	\$18,475.40
Transit Fares	\$6,391.90	\$5,291.65	\$7,239.75	\$4,201.05	\$23,124.35
Management Fees	\$2,036.43	\$1,904.39	\$2,985.21	\$2,071.77	\$8,997.80
Corporate/Business/Foundation	\$9.43	\$2,508.32	\$9.17	\$8.34	\$2,535.26
Miscellaneous	\$0.98	\$0.69	\$0.73	\$1,501.09	\$1,503.49
- Unassigned -	(\$1,241.92)			\$494.95	(\$746.97)
Other Contract Revenue	(\$815.64)				(\$815.64)
Total	\$1,013,807.71	\$2,398,910.84	\$2,379,100.58	\$1,799,614.14	\$7,591,433.27

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024

4/30/24

Options: Activity Only

Agency Wide

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$15,000.00	\$11,904.69	\$3,095.31	79.36%
4100 - Inkind Revenue	\$1,343,067.00	\$271,847.99	\$1,071,219.01	20.24%
4200 - Miscellaneous Revenue	\$0.00	\$321,604.59	(\$321,604.59)	0.00%
4400 - State Revenue	\$1,476,608.42	\$552,824.79	\$923,783.63	37.44%
4500 - Federal Revenue	\$10,442,365.11	\$4,066,372.49	\$6,375,992.62	38.94%
4900 - Recoveries from Programs	\$2,012,486.97	\$1,261,541.63	\$750,945.34	62.69%
5000 - Rental Revenue	\$0.00	\$270,725.32	(\$270,725.32)	0.00%
5100 - Program Fee Revenue	\$0.00	\$458,043.77	(\$458,043.77)	0.00%
5300 - Interest and Dividends	\$0.00	\$109,686.72	(\$109,686.72)	0.00%
5400 - Revenue from other sources	\$0.00	\$306,887.43	(\$306,887.43)	0.00%
5800 - Special Event Expense	\$0.00	\$2,850.00	(\$2,850.00)	0.00%
Total - Income	\$15,289,527.50	\$7,634,289.42	\$7,655,238.08	49.93%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$614.13	(\$614.13)	0.00%
Total - Cost Of Sales	\$0.00	\$614.13	(\$614.13)	0.00%
Gross Profit	\$15,289,527.50	\$7,633,675.29	\$7,655,852.21	49.93%
Expense				
7000 - Grants, contracts, & direct assistance	\$24,599.15	\$302,879.35	(\$278,280.20)	1,231.26%
7200 - Salaries & related expenses	\$8,023,176.75	\$4,315,409.55	\$3,707,767.20	53.79%
7300 - Indirect Cost Pool Expense	\$1,260,435.22	\$764,193.45	\$496,241.77	60.63%
7500 - Contract/Consultant Services	\$293,710.81	\$599,988.58	(\$306,277.77)	204.28%
8100 - Non personnel expenses	\$504,320.26	\$448,347.18	\$55,973.08	88.90%
8200 - Facility & equipment expenses	\$984,733.15	\$844,746.66	\$139,986.49	85.78%
8300 - Travel & meetings expenses	\$805,128.96	\$206,250.67	\$598,878.29	25.62%
8400 - Insurance Expense	\$81,915.40	\$1,090,436.07	(\$1,008,520.67)	1,331.17%
8600 - Business expenses	\$0.00	\$918.50	(\$918.50)	0.00%
8700 - Food Expenses	\$83,270.00	\$513,186.20	(\$429,916.20)	616.29%
8800 - In-Kind Expenses	\$1,149,976.00	\$271,847.99	\$878,128.01	23.64%
Total - Expense	\$13,211,265.70	\$9,358,204.20	\$3,853,061.50	70.84%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,413,715.13	\$694,201.93	\$719,513.20	49.10%
Total - Other Expense	\$1,413,715.13	\$694,201.93	\$719,513.20	49.10%
Net Income	\$664,546.67	(\$2,418,730.84)	\$3,083,277.51	-363.97%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024

4/30/24

Options: Activity Only

OPERATING

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$0.00	\$1,302.42	(\$1,302.42)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$13,757.59	(\$13,757.59)	0.00%
4400 - State Revenue	\$0.00	\$282,091.92	(\$282,091.92)	0.00%
4900 - Recoveries from Programs	\$2,012,486.97	\$1,261,541.63	\$750,945.34	62.69%
5000 - Rental Revenue	\$0.00	\$102,032.32	(\$102,032.32)	0.00%
5300 - Interest and Dividends	\$0.00	\$13,343.25	(\$13,343.25)	0.00%
5400 - Revenue from other sources	\$0.00	\$253,337.40	(\$253,337.40)	0.00%
Total - Income	\$2,012,486.97	\$1,927,406.53	\$85,080.44	95.77%
Gross Profit	\$2,012,486.97	\$1,927,406.53	\$85,080.44	95.77%
Expense				
7200 - Salaries & related expenses	\$1,480,512.38	\$429,190.03	\$1,051,322.35	28.99%
7300 - Indirect Cost Pool Expense	\$0.00	\$18,187.93	(\$18,187.93)	0.00%
7500 - Contract/Consultant Services	\$115,215.21	\$117,208.29	(\$1,993.08)	101.73%
8100 - Non personnel expenses	\$54,841.35	\$133,203.06	(\$78,361.71)	242.89%
8200 - Facility & equipment expenses	\$40,902.28	\$212,886.35	(\$171,984.07)	520.48%
8300 - Travel & meetings expenses	\$82,133.76	\$30,549.69	\$51,584.07	37.20%
8400 - Insurance Expense	\$34,962.98	\$640,248.61	(\$605,285.63)	1,831.22%
8600 - Business expenses	\$0.00	\$911.00	(\$911.00)	0.00%
8700 - Food Expenses	\$0.00	\$6,115.96	(\$6,115.96)	0.00%
Total - Expense	\$1,808,567.96	\$1,588,500.92	\$220,067.04	87.83%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$153,301.25	\$195,682.54	(\$42,381.29)	127.65%
Total - Other Expense	\$153,301.25	\$195,682.54	(\$42,381.29)	127.65%
Net Income	\$50,617.76	\$143,223.07	(\$92,605.31)	282.95%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Apr 2024

Financial Row	- No Department -		10 Operating		
			Administration	Building Funds	Total
	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense					
Income					
4000 - Contribution Revenue	\$0.00	\$0.00	\$1,302.42	\$0.00	\$1,302.42
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4200 - Miscellaneous Revenue	(\$140.64)	\$0.00	\$13,757.59	\$0.00	\$13,757.59
4400 - State Revenue	\$0.00	\$0.00	\$282,091.92	\$0.00	\$282,091.92
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4900 - Recoveries from Programs	\$0.00	\$0.00	\$1,261,541.63	\$0.00	\$1,261,541.63
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$102,032.32	\$102,032.32
5100 - Program Fee Revenue	\$3,999.09	\$0.00	\$0.00	\$0.00	\$0.00
5300 - Interest and Dividends	\$0.00	\$0.00	\$12,834.43	\$508.82	\$13,343.25
5400 - Revenue from other sources	\$0.00	\$0.00	\$175,000.00	\$78,337.40	\$253,337.40
5800 - Special Event Expense	\$40.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$3,898.45	\$0.00	\$1,746,527.99	\$180,878.54	\$1,927,406.53
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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$590,048.83	\$0.00	\$370,745.81	\$0.00	\$370,745.81
7300 - Indirect Cost Pool Expense	\$87,253.11	\$0.00	\$16,312.27	\$0.00	\$16,312.27
7500 - Contract/Consultant Services	\$45,151.57	\$47,994.89	\$56,664.13	\$12,549.27	\$117,208.29
8100 - Non personnel expenses	\$21,918.09	\$0.00	\$130,128.90	\$1,560.87	\$131,689.77
8200 - Facility & equipment expenses	\$50,885.18	\$0.00	\$117,978.85	\$94,596.64	\$212,575.49
8300 - Travel & meetings expenses	\$1,233.98	\$0.00	\$24,933.49	\$576.20	\$25,509.69
8400 - Insurance Expense	\$1,880.05	\$0.00	\$591,162.03	\$49,265.00	\$640,427.03
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$911.00	\$911.00
8700 - Food Expenses	\$66,932.79	\$67.91	\$6,043.99	\$4.06	\$6,115.96
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$865,303.60	\$48,062.80	\$1,313,969.47	\$159,463.04	\$1,521,495.31
Net Ordinary Income	(\$861,405.15)	(\$48,062.80)	\$432,558.52	\$21,415.50	\$405,911.22
Other Income and Expenses					
Other Expense					
8500 - Other Expense	\$16,687.72	\$0.00	\$193,201.39	\$2,481.15	\$195,682.54
Total - Other Expense	\$16,687.72	\$0.00	\$193,201.39	\$2,481.15	\$195,682.54

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024

Options: Activity Only

Early Childhood

4/30/24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$10,000.00	\$0.00	\$10,000.00	0.00%
4100 - Inkind Revenue	\$877,688.00	\$246,941.21	\$630,746.79	28.14%
4200 - Miscellaneous Revenue	\$0.00	\$266,513.32	(\$266,513.32)	0.00%
4400 - State Revenue	\$0.00	\$55,045.60	(\$55,045.60)	0.00%
4500 - Federal Revenue	\$4,509,940.00	\$2,508,682.26	\$2,001,257.74	55.63%
5100 - Program Fee Revenue	\$0.00	\$175,460.80	(\$175,460.80)	0.00%
5300 - Interest and Dividends	\$0.00	\$11,631.81	(\$11,631.81)	0.00%
Total - Income	\$5,397,628.00	\$3,264,275.00	\$2,133,353.00	60.48%
Gross Profit	\$5,397,628.00	\$3,264,275.00	\$2,133,353.00	60.48%
Expense				
7200 - Salaries & related expenses	\$3,419,697.23	\$1,721,002.07	\$1,698,695.16	50.33%
7300 - Indirect Cost Pool Expense	\$671,793.77	\$341,204.12	\$330,589.65	50.79%
7500 - Contract/Consultant Services	\$49,200.00	\$297,023.32	(\$247,823.32)	603.71%
8100 - Non personnel expenses	\$56,090.00	\$178,919.68	(\$122,829.68)	318.99%
8200 - Facility & equipment expenses	\$101,708.00	\$64,259.94	\$37,448.06	63.18%
8300 - Travel & meetings expenses	\$59,400.00	\$34,661.12	\$24,738.88	58.35%
8400 - Insurance Expense	\$37,000.00	\$128,714.72	(\$91,714.72)	347.88%
8700 - Food Expenses	\$68,870.00	\$431,675.27	(\$362,805.27)	626.80%
8800 - In-Kind Expenses	\$684,597.00	\$246,941.21	\$437,655.79	36.07%
Total - Expense	\$5,148,356.00	\$3,444,401.45	\$1,703,954.55	66.90%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$86,781.00	\$188,247.61	(\$101,466.61)	216.92%
Total - Other Expense	\$86,781.00	\$188,247.61	(\$101,466.61)	216.92%
Net Income	\$162,491.00	(\$368,374.06)	\$530,865.06	-226.70%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Apr 2024

Financial Row	20 Early Childhood							
		CACFP - Daycare Homes	Early Head Start - CC	Early Learning Centers		HS/EHS		Total
	Amount	Amount	Amount	Amount	Amount	EHS Amount	Head Start Amount	Amount
Ordinary Income/Expense								
Income								
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4100 - Inkind Revenue	\$0.00	\$0.00	\$885.57	\$6,620.00	\$0.00	\$0.00	\$239,435.64	\$239,435.64
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$159,035.47	\$35,343.00	\$0.00	\$72,134.85	\$107,477.85
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$55,045.60	\$55,045.60
4500 - Federal Revenue	\$0.00	\$274,398.78	\$539,819.66	\$16,265.56	\$0.00	(\$55.32)	\$1,678,253.58	\$1,678,198.26
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	\$168.00	\$0.00	\$0.00	\$174,742.80	\$0.00	\$0.00	\$0.00	\$0.00
5300 - Interest and Dividends	\$0.00	\$0.00	\$0.00	\$4,272.12	\$7,333.41	\$0.00	\$26.28	\$7,359.69
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$168.00	\$274,398.78	\$540,705.23	\$360,935.95	\$42,676.41	(\$55.32)	\$2,044,895.95	\$2,087,517.04
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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$57,683.63	\$28,611.69	\$196,216.04	\$190,521.62	\$1,350.63	\$221,462.19	\$806,627.10	\$1,029,439.92
7300 - Indirect Cost Pool Expense	\$11,116.60	\$5,629.50	\$38,743.21	\$33,160.48	\$751.35	\$42,403.90	\$165,996.66	\$209,151.91
7500 - Contract/Consultant Services	\$0.00	\$2,229.00	\$254,577.27	\$1,134.00	\$24,561.40	\$0.00	\$13,577.95	\$38,139.35
8100 - Non personnel expenses	\$3,253.51	\$838.58	\$39,104.24	\$13,248.17	\$10,018.68	\$77.99	\$111,925.36	\$122,022.03
8200 - Facility & equipment expenses	\$0.00	\$1,496.00	\$3,625.85	\$5,177.88	\$15,387.32	\$197.97	\$38,135.99	\$53,721.28
8300 - Travel & meetings expenses	\$68.12	\$9,233.75	\$3,852.55	\$1,963.77	\$345.49	\$33.58	\$19,045.06	\$19,424.13
8400 - Insurance Expense	\$0.00	\$0.00	\$15,821.80	\$24,527.80	\$4.00	\$0.00	\$88,361.12	\$88,365.12
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$103.05	\$238,575.27	\$14.22	\$36,278.08	\$6,750.75	\$0.00	\$149,489.51	\$156,240.26
8800 - In-Kind Expenses	\$0.00	\$0.00	\$885.57	\$6,620.00	\$0.00	\$0.00	\$239,435.64	\$239,435.64
Total - Expense	\$72,224.91	\$286,613.79	\$552,840.75	\$312,631.80	\$59,169.62	\$264,175.63	\$1,632,594.39	\$1,955,939.64
Net Ordinary Income	(\$72,056.91)	(\$12,215.01)	(\$12,135.52)	\$48,304.15	(\$16,493.21)	(\$264,230.95)	\$412,301.56	\$131,577.40
Other Income and Expenses								
Other Expense								
8500 - Other Expense	\$0.00	\$59.70	\$95,522.35	\$2,531.40	\$7,942.29	\$0.00	\$82,271.87	\$90,214.16
Total - Other Expense	\$0.00	\$59.70	\$95,522.35	\$2,531.40	\$7,942.29	\$0.00	\$82,271.87	\$90,214.16

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024

4/30/24

Options: Activity Only

Community Service

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$5,000.00	\$10,593.27	(\$5,593.27)	211.87%
4100 - Inkind Revenue	\$277,879.00	\$24,906.78	\$252,972.22	8.96%
4200 - Miscellaneous Revenue	\$0.00	\$3,774.65	(\$3,774.65)	0.00%
4400 - State Revenue	\$1,476,608.42	\$130,144.26	\$1,346,464.16	8.81%
4500 - Federal Revenue	\$2,737,517.00	\$671,410.92	\$2,066,106.08	24.53%
5300 - Interest and Dividends	\$0.00	\$564.81	(\$564.81)	0.00%
5400 - Revenue from other sources	\$0.00	\$19,000.00	(\$19,000.00)	0.00%
5800 - Special Event Expense	\$0.00	\$2,480.00	(\$2,480.00)	0.00%
Total - Income	\$4,497,004.42	\$862,874.69	\$3,634,129.73	19.19%
Gross Profit	\$4,497,004.42	\$862,874.69	\$3,634,129.73	19.19%
Expense				
7000 - Grants, contracts, & direct assistance	\$24,599.15	\$26,921.66	(\$2,322.51)	109.44%
7200 - Salaries & related expenses	\$2,012,145.85	\$566,136.86	\$1,446,008.99	28.14%
7300 - Indirect Cost Pool Expense	\$365,014.19	\$113,471.45	\$251,542.74	31.09%
7500 - Contract/Consultant Services	\$110,979.00	\$60,459.03	\$50,519.97	54.48%
8100 - Non personnel expenses	\$326,340.61	\$31,596.08	\$294,744.53	9.68%
8200 - Facility & equipment expenses	\$149,152.71	\$32,661.88	\$116,490.83	21.90%
8300 - Travel & meetings expenses	\$185,147.20	\$38,826.59	\$146,320.61	20.97%
8400 - Insurance Expense	\$50.00	\$4,553.00	(\$4,503.00)	9,106.00%
8600 - Business expenses	\$0.00	\$7.50	(\$7.50)	0.00%
8700 - Food Expenses	\$14,400.00	\$6,140.23	\$8,259.77	42.64%
8800 - In-Kind Expenses	\$277,879.00	\$24,906.78	\$252,972.22	8.96%
Total - Expense	\$3,465,707.71	\$905,681.06	\$2,560,026.65	26.13%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,031,296.00	\$83,502.89	\$947,793.11	8.10%
Total - Other Expense	\$1,031,296.00	\$83,502.89	\$947,793.11	8.10%
Net Income	\$0.71	(\$126,309.26)	\$126,309.97	-17,790,036.62%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Apr 2024

Financial Row	30 Community Service															
		CASA	Community Services	Drug Free Communities		Emergency Services EFSP	Total	Healthy Start	Mentoring	RCOR TRI-CORP	RSVP	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	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,570.00	\$0.00	\$0.00	\$0.00	\$4,523.27	\$10,593.27
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$17,555.04	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,351.74	\$0.00	\$0.00	\$0.00	\$0.00	\$24,906.78
4200 - Miscellaneous Revenue	\$0.00	\$1,274.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,774.65
4400 - State Revenue	\$51,149.55	\$2,884.32	\$76,110.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130,144.26
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$25,368.00	\$0.00	\$0.00	\$0.00	\$279,506.09	\$0.00	\$98,967.89	\$7,378.10	\$36,390.02	\$60,783.27	\$30,552.55	\$132,465.00	\$671,410.92
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	\$15.41	\$79.31	\$26.35	\$28.08	\$10.10	\$0.00	\$10.10	\$7.28	\$53.95	\$13.15	\$4.90	\$0.00	\$13.29	\$308.01	\$4.98	\$564.81
5400 - Revenue from other sources	\$0.00	\$5,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,500.00	\$0.00	\$7,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19,000.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$980.00	\$0.00	\$1,500.00	\$2,480.00
Total - Income	\$51,164.96	\$10,238.28	\$76,136.74	\$42,951.12	\$10.10	\$0.00	\$10.10	\$282,013.37	\$6,553.95	\$98,981.04	\$27,304.74	\$36,390.02	\$61,776.56	\$30,860.56	\$138,493.25	\$862,874.69
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	\$0.00	\$0.00	\$19,000.00	\$0.00	\$1,776.98	\$2,583.65	\$4,360.63	\$0.00	\$0.00	\$0.00	\$0.00	\$2,679.72	\$0.00	\$881.31	\$0.00	\$26,921.66
7200 - Salaries & related expenses	\$57,446.16	\$0.00	\$5,438.61	\$15,807.49	\$0.00	\$0.00	\$0.00	\$174,836.01	\$807.46	\$74,020.41	\$17,948.33	\$15,797.25	\$36,633.20	\$31,833.17	\$62,470.67	\$493,038.76
7300 - Indirect Cost Pool Expense	\$11,333.15	\$0.00	\$1,112.18	\$3,113.88	\$0.00	\$0.00	\$0.00	\$35,118.99	\$156.02	\$14,761.21	\$3,797.49	\$3,121.07	\$7,461.50	\$6,253.85	\$12,846.75	\$99,076.09
7500 - Contract/Consultant Services	\$877.50	\$0.00	\$8,560.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25,542.09	\$0.00	\$0.00	\$0.00	\$336.76	\$22,222.00	\$0.00	\$705.68	\$58,244.03
8100 - Non personnel expenses	\$5,861.63	\$232.26	\$834.31	\$11.89	\$0.00	\$0.00	\$0.00	\$9,693.28	\$325.20	\$7,581.81	\$525.63	\$962.92	\$3,814.98	\$272.63	\$1,326.11	\$31,442.65
8200 - Facility & equipment expenses	\$5,531.90	\$570.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11,256.00	\$0.00	\$3,031.98	\$1,036.00	\$2,158.00	\$1,520.00	\$1,558.00	\$6,000.00	\$32,661.88
8300 - Travel & meetings expenses	\$805.94	\$1,198.63	\$0.00	\$105.45	\$0.00	\$0.00	\$0.00	\$10,640.00	\$0.00	\$6,621.75	\$702.44	\$2,131.27	\$4,886.31	\$885.07	\$8,403.20	\$36,380.06
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$24.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,529.00	\$4,553.00
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	\$7.50	\$7.50
8700 - Food Expenses	\$916.12	\$0.00	\$0.00	\$255.57	\$0.00	\$0.00	\$0.00	\$3,870.87	\$0.00	\$0.00	\$933.19	\$0.00	\$0.00	\$0.00	\$164.48	\$6,140.23
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$17,555.04	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,351.74	\$0.00	\$0.00	\$0.00	\$0.00	\$24,906.78
Total - Expense	\$82,772.40	\$2,000.89	\$34,945.10	\$36,849.32	\$1,776.98	\$2,583.65	\$4,360.63	\$270,981.24	\$1,288.68	\$106,017.16	\$32,294.82	\$27,186.99	\$76,537.99	\$41,684.03	\$96,453.39	\$813,372.64
Net Ordinary Income	(\$31,607.44)	\$8,237.39	\$41,191.64	\$6,101.80	(\$1,766.88)	(\$2,583.65)	(\$4,350.53)	\$11,032.13	\$5,265.27	(\$7,036.12)	(\$4,990.08)	\$9,203.03	(\$14,761.43)	(\$10,823.47)	\$42,039.86	\$49,502.05
Other Income and Expenses																
Other Expense																
8500 - Other Expense	\$11,459.76	\$2,561.98	\$3,485.00	\$6,087.59	\$0.00	\$0.00	\$0.00	\$13,038.37	\$4.70	\$419.64	\$114.55	\$126.86	\$2,486.97	\$119.40	\$42,392.07	\$82,296.89
Total - Other Expense	\$11,459.76	\$2,561.98	\$3,485.00	\$6,087.59	\$0.00	\$0.00	\$0.00	\$13,038.37	\$4.70	\$419.64	\$114.55	\$126.86	\$2,486.97	\$119.40	\$42,392.07	\$82,296.89

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024
Options: Activity Only

Housing

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$187,500.00	\$0.00	\$187,500.00	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$36,744.67	(\$36,744.67)	0.00%
4400 - State Revenue	\$0.00	\$3,685.00	(\$3,685.00)	0.00%
4500 - Federal Revenue	\$3,194,908.11	\$880,634.39	\$2,314,273.72	27.56%
5000 - Rental Revenue	\$0.00	\$168,693.00	(\$168,693.00)	0.00%
5100 - Program Fee Revenue	\$0.00	\$48,572.26	(\$48,572.26)	0.00%
5300 - Interest and Dividends	\$0.00	\$73,841.80	(\$73,841.80)	0.00%
5400 - Revenue from other sources	\$0.00	\$4,900.00	(\$4,900.00)	0.00%
Total - Income	\$3,382,408.11	\$1,217,071.12	\$2,165,336.99	35.98%
Gross Profit	\$3,382,408.11	\$1,217,071.12	\$2,165,336.99	35.98%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$246,432.00	(\$246,432.00)	0.00%
7200 - Salaries & related expenses	\$1,110,821.29	\$559,740.99	\$551,080.30	50.39%
7300 - Indirect Cost Pool Expense	\$223,627.26	\$114,346.64	\$109,280.62	51.13%
7500 - Contract/Consultant Services	\$18,316.60	\$59,331.22	(\$41,014.62)	323.92%
8100 - Non personnel expenses	\$67,048.30	\$35,426.29	\$31,622.01	52.84%
8200 - Facility & equipment expenses	\$692,970.16	\$241,031.02	\$451,939.14	34.78%
8300 - Travel & meetings expenses	\$478,448.00	\$38,730.02	\$439,717.98	8.09%
8400 - Insurance Expense	\$9,902.42	\$178,443.76	(\$168,541.34)	1,802.02%
8800 - In-Kind Expenses	\$187,500.00	\$0.00	\$187,500.00	0.00%
Total - Expense	\$2,788,634.03	\$1,473,481.94	\$1,315,152.09	52.84%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$142,336.88	\$112,241.19	\$30,095.69	78.86%
Total - Other Expense	\$142,336.88	\$112,241.19	\$30,095.69	78.86%
Net Income	\$451,437.20	(\$368,652.01)	\$820,089.21	-81.66%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Apr 2024

Financial Row	40 Housing Department									
	Apartments		Construction	HUD Apartments (Lift)	Housing Leatherization		Total	Self Help Housing	TMA	Total
	Amount	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	\$0.00	\$0.00	\$0.00	\$0.00
4100 - Inkind Revenue	\$0.00	\$0.00	\$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	\$0.00	\$36,744.67	\$0.00	\$36,744.67	\$0.00	\$0.00	\$36,744.67
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$3,685.00	\$0.00	\$3,685.00	\$0.00	\$0.00	\$3,685.00
4500 - Federal Revenue	\$0.00	\$0.00	\$52,353.76	\$0.00	\$335,439.80	\$0.00	\$335,439.80	\$147,813.52	\$345,027.31	\$880,634.39
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$9,284.00	\$135,328.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$144,612.00
5100 - Program Fee Revenue	\$108.14	\$2,005.43	\$0.00	\$8,997.80	\$30,757.29	\$0.00	\$30,757.29	\$55.75	\$0.00	\$41,924.41
5300 - Interest and Dividends	\$61,397.00	\$7,749.54	\$0.00	\$0.00	\$4,653.74	\$0.00	\$4,653.74	\$0.00	\$0.00	\$73,800.28
5400 - Revenue from other sources	\$0.00	\$4,900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,900.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$70,789.14	\$149,982.97	\$52,353.76	\$8,997.80	\$411,280.50	\$0.00	\$411,280.50	\$147,869.27	\$345,027.31	\$1,186,300.75
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
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
Expense										
7000 - Grants, contracts, & direct assistance	\$65,597.00	\$5,835.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175,000.00	\$246,432.00
7200 - Salaries & related expenses	\$19,625.76	\$7,318.38	\$182,738.28	(\$98.29)	\$75.72	\$5,114.48	\$5,190.20	\$121,184.20	\$143,534.17	\$479,492.70
7300 - Indirect Cost Pool Expense	\$4,180.80	\$1,429.73	\$36,212.73	\$2,021.59	\$239.15	\$1,080.67	\$1,319.82	\$23,555.35	\$29,551.82	\$98,271.84
7500 - Contract/Consultant Services	\$0.00	\$5,866.00	\$11,976.00	\$0.00	\$29,534.00	\$0.00	\$29,534.00	\$0.00	\$11,955.22	\$59,331.22
8100 - Non personnel expenses	\$1,137.00	\$2,056.57	\$12,980.37	\$63.37	\$10,221.81	\$0.00	\$10,221.81	\$2,689.62	\$5,304.70	\$34,453.44
8200 - Facility & equipment expenses	\$6,504.45	\$65,888.38	\$4,668.91	\$1,046.17	\$149,395.72	\$0.00	\$149,395.72	\$6,957.53	\$6,640.00	\$241,101.16
8300 - Travel & meetings expenses	\$51.25	(\$421.00)	\$3,147.56	\$303.51	(\$3,672.52)	\$0.00	(\$3,672.52)	\$17,902.40	\$20,014.56	\$37,325.76
8400 - Insurance Expense	\$0.00	\$155,865.12	\$0.00	\$0.00	\$22,416.64	\$0.00	\$22,416.64	\$162.00	\$0.00	\$178,443.76
8600 - Business expenses	\$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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$97,096.26	\$243,838.18	\$251,723.85	\$3,336.35	\$208,210.52	\$6,195.15	\$214,405.67	\$172,451.10	\$392,000.47	\$1,374,851.88
Net Ordinary Income	(\$26,307.12)	(\$93,855.21)	(\$199,370.09)	\$5,661.45	\$203,069.98	(\$6,195.15)	\$196,874.83	(\$24,581.83)	(\$46,973.16)	(\$188,551.13)
Other Income and Expenses										
Other Expense										
8500 - Other Expense	\$0.00	\$3,501.13	\$16,146.88	\$0.00	\$85,781.67	\$0.00	\$85,781.67	\$478.68	\$6,307.83	\$112,216.19
Total - Other Expense	\$0.00	\$3,501.13	\$16,146.88	\$0.00	\$85,781.67	\$0.00	\$85,781.67	\$478.68	\$6,307.83	\$112,216.19

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024
Options: Activity Only

Transportation

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4400 - State Revenue	\$0.00	\$52,369.00	(\$52,369.00)	0.00%
4500 - Federal Revenue	\$0.00	\$5,644.92	(\$5,644.92)	0.00%
5100 - Program Fee Revenue	\$0.00	\$120,725.41	(\$120,725.41)	0.00%
5300 - Interest and Dividends	\$0.00	\$568.98	(\$568.98)	0.00%
5400 - Revenue from other sources	\$0.00	\$29,525.69	(\$29,525.69)	0.00%
Total - Income	\$0.00	\$208,834.00	(\$208,834.00)	0.00%
Gross Profit	\$0.00	\$208,834.00	(\$208,834.00)	0.00%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$29,525.69	(\$29,525.69)	0.00%
7200 - Salaries & related expenses	\$0.00	\$328,809.20	(\$328,809.20)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$67,444.63	(\$67,444.63)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$14,295.50	(\$14,295.50)	0.00%
8100 - Non personnel expenses	\$0.00	\$17,155.45	(\$17,155.45)	0.00%
8200 - Facility & equipment expenses	\$0.00	\$106,521.48	(\$106,521.48)	0.00%
8300 - Travel & meetings expenses	\$0.00	\$57,645.62	(\$57,645.62)	0.00%
8400 - Insurance Expense	\$0.00	\$77,641.66	(\$77,641.66)	0.00%
Total - Expense	\$0.00	\$699,039.23	(\$699,039.23)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$85,510.29	(\$85,510.29)	0.00%
Total - Other Expense	\$0.00	\$85,510.29	(\$85,510.29)	0.00%
Net Income	\$0.00	(\$575,715.52)	\$575,715.52	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Apr 2024

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	\$0.00	\$0.00
4400 - State Revenue	\$0.00	\$52,369.00	\$52,369.00
4500 - Federal Revenue	\$0.00	\$5,644.92	\$5,644.92
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$0.00	\$119,300.06	\$119,300.06
5300 - Interest and Dividends	\$0.00	\$568.98	\$568.98
5400 - Revenue from other sources	\$0.00	\$29,525.69	\$29,525.69
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00
Total - Income	\$0.00	\$207,408.65	\$207,408.65
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	\$29,525.69	\$29,525.69
7200 - Salaries & related expenses	\$10,810.49	\$278,079.42	\$288,889.91
7300 - Indirect Cost Pool Expense	\$2,197.63	\$57,219.18	\$59,416.81
7500 - Contract/Consultant Services	\$0.00	\$14,295.50	\$14,295.50
8100 - Non personnel expenses	\$2,408.88	\$14,315.81	\$16,724.69
8200 - Facility & equipment expenses	\$0.00	\$106,521.48	\$106,521.48
8300 - Travel & meetings expenses	\$0.00	\$56,273.00	\$56,273.00
8400 - Insurance Expense	\$0.00	\$77,641.66	\$77,641.66
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	\$15,417.00	\$633,871.74	\$649,288.74
Net Ordinary Income	(\$15,417.00)	(\$426,463.09)	(\$441,880.09)
Other Income and Expenses			
Other Expense			
8500 - Other Expense	\$0.00	\$85,506.29	\$85,506.29
Total - Other Expense	\$0.00	\$85,506.29	\$85,506.29

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2024 to Dec 2024
Options: Activity Only

Economic Development

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$0.00	\$9.00	(\$9.00)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$955.00	(\$955.00)	0.00%
4400 - State Revenue	\$0.00	\$29,489.01	(\$29,489.01)	0.00%
5100 - Program Fee Revenue	\$0.00	\$107,717.46	(\$107,717.46)	0.00%
5300 - Interest and Dividends	\$0.00	\$9,736.07	(\$9,736.07)	0.00%
5400 - Revenue from other sources	\$0.00	\$124.34	(\$124.34)	0.00%
5800 - Special Event Expense	\$0.00	\$330.00	(\$330.00)	0.00%
Total - Income	\$0.00	\$148,360.88	(\$148,360.88)	0.00%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$614.13	(\$614.13)	0.00%
Total - Cost Of Sales	\$0.00	\$614.13	(\$614.13)	0.00%
Gross Profit	\$0.00	\$147,746.75	(\$147,746.75)	0.00%
Expense				
7200 - Salaries & related expenses	\$0.00	\$103,897.16	(\$103,897.16)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$21,555.22	(\$21,555.22)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$4,668.35	(\$4,668.35)	0.00%
8100 - Non personnel expenses	\$0.00	\$28,596.46	(\$28,596.46)	0.00%
8200 - Facility & equipment expenses	\$0.00	\$135,595.43	(\$135,595.43)	0.00%
8300 - Travel & meetings expenses	\$0.00	\$4,603.65	(\$4,603.65)	0.00%
8400 - Insurance Expense	\$0.00	\$58,954.27	(\$58,954.27)	0.00%
Total - Expense	\$0.00	\$357,870.54	(\$357,870.54)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$12,329.69	(\$12,329.69)	0.00%
Total - Other Expense	\$0.00	\$12,329.69	(\$12,329.69)	0.00%
Net Income	\$0.00	(\$222,453.48)	\$222,453.48	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Apr 2024

Financial Row	60 Economic Development						
	Economic Development/Lending						Total Amount
	Amount	Amount	Amount	Amount	State Parks Hugo Lake Clayton Lake Raymond Gary	Amount	
Ordinary Income/Expense							
Income							
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$9.00	\$0.00	\$0.00	\$9.00
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$955.00	\$0.00	\$955.00
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$14,257.50	\$0.00	\$15,231.51	\$29,489.01
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$0.00	\$1,804.07	\$3,417.00	\$7,462.00	\$67,651.02	\$19,880.50	\$98,410.52
5300 - Interest and Dividends	\$0.00	\$7,510.74	\$0.00	\$0.00	\$1,013.37	\$198.15	\$1,211.52
5400 - Revenue from other sources	\$0.00	\$0.00	\$7.40	\$0.00	\$76.94	\$15.00	\$99.34
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$330.00	\$0.00	\$330.00
Total - Income	\$0.00	\$9,314.81	\$3,424.40	\$21,728.50	\$70,026.33	\$35,325.16	\$130,504.39
8000 - Cost of Goods Sold							
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$0.00	\$614.13	\$0.00	\$614.13
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$0.00	\$614.13	\$0.00	\$614.13
Expense							
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$0.00	\$0.00	\$0.00	\$15,169.45	\$54,953.64	\$20,600.50	\$90,723.59
7300 - Indirect Cost Pool Expense	\$0.00	\$0.00	\$0.00	\$3,136.94	\$11,510.18	\$4,234.52	\$18,881.64
7500 - Contract/Consultant Services	\$0.00	\$0.00	\$0.00	\$0.00	\$4,593.35	\$75.00	\$4,668.35
8100 - Non personnel expenses	\$75.83	\$613.33	\$0.00	\$384.81	\$26,039.01	\$1,240.66	\$27,664.48
8200 - Facility & equipment expenses	\$0.00	\$8,391.62	\$129.68	\$2,961.01	\$117,087.60	\$4,892.67	\$125,070.96
8300 - Travel & meetings expenses	\$0.00	\$0.00	\$0.00	\$53.75	\$3,482.10	\$975.27	\$4,511.12
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$5,823.03	\$45,617.21	\$7,514.03	\$58,954.27
8600 - Business expenses	\$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	\$0.00	\$0.00	\$0.00
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$75.83	\$9,004.95	\$129.68	\$27,528.99	\$263,283.09	\$39,532.65	\$330,474.41
Net Ordinary Income	(\$75.83)	\$309.86	\$3,294.72	(\$5,800.49)	(\$193,870.89)	(\$4,207.49)	(\$200,584.15)
Other Income and Expenses							
Other Expense							
8500 - Other Expense	\$0.00	\$0.00	\$0.00	\$575.21	\$8,901.93	\$2,852.55	\$12,329.69
Total - Other Expense	\$0.00	\$0.00	\$0.00	\$575.21	\$8,901.93	\$2,852.55	\$12,329.69

LIFT Community Action Agency Inc

Parent - Lift : LIFT Community Action Agency Inc

Credit Card Vendor Totals

Mar 2024

Options: Show Zeros

NAME	AMOUNT (GROSS)
CAPITAL ONE	\$24,366.59
DAVISON FUELS & OIL, LLC	\$9,833.09
HOME DEPOT BRC/GECF	\$5,834.51
OFFICE DEPOT BUSINESS CREDIT	\$112.69
TCM BANK NA	\$20,837.93
WAL-MART COMMUNITY BRC	\$5,214.63
Total	\$66,199.44

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency
Credit Card Report
Apr 2024

Program	Facility & equipment expenses		Food Expenses				Housing assistance		Non personnel expenses								
	CAPITALIZED Building/Equip		Total Nutrition Cost		Nutrition Cost Food Expense		Housing assistance - Other Living Expense		Living Supplies		Rent Supplies & shipping		Special Events Tele & Internet		Total sponsorships		
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	
Administration			\$0.00		\$59.99	\$789.01	\$849.00		\$156.00	\$812.10	\$238.77			\$64.99		\$1,271.86	\$5,947.58
Apartments	\$290.36	\$290.36	\$290.36				\$0.00									\$0.00	
CASA			\$0.00				\$0.00									\$0.00	
Early Head Start Child Care			\$0.00			\$14.22	\$14.22			\$78.40						\$78.40	
Early Learning Centers			\$0.00	\$153.13	\$85.71	\$486.94	\$725.78			\$1,459.00	\$0.00					\$1,459.00	
Head Start			\$0.00		\$1,154.46	\$862.16	\$2,016.62			\$1,544.38						\$1,544.38	
Healthy Start			\$0.00				\$0.00									\$0.00	
Housing			\$0.00				\$0.00			\$79.02						\$79.02	
Safe Place Healing Hearts			\$0.00				\$0.00	\$342.29								\$0.00	
State Park	\$6,625.59	\$1,866.21	\$8,491.80				\$0.00				\$79.76				\$617.88	\$697.64	
T&MA			\$0.00				\$0.00			\$86.90		\$13.20				\$100.10	
TRANSIT			\$0.00				\$0.00									\$0.00	
Tri-CORPS			\$0.00				\$0.00							\$91.58		\$91.58	
Youth Build			\$0.00			\$12.40	\$12.40			\$34.04	\$30.95					\$64.99	
Total	\$6,625.59	\$2,156.57	\$8,782.16	\$153.13	\$1,300.16	\$2,164.73	\$3,618.02	\$342.29	\$156.00	\$4,093.84	\$349.48	\$13.20	\$156.57	\$617.88	\$5,386.97	\$5,947.58	

Inc

ed Expenses	Other Expense					Travel & meetings expenses				Total
	Fees/Dues ing	Expense er	Expenses	Recognition	aining & TTA	Total	Fuel Cost f	Area Travel	Total	
Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
\$1,492.19	\$622.63		\$103.78	\$117.21	\$1,723.00	\$10,006.39		\$3,007.25	\$3,007.25	\$15,134.50
						\$0.00	\$147.00		\$147.00	\$437.36
	\$19.00					\$19.00			\$0.00	\$19.00
					\$792.03	\$792.03	\$235.30		\$235.30	\$1,119.95
	\$108.50				\$80.00	\$188.50			\$0.00	\$2,373.28
	\$166.07		\$63.93	\$263.23	\$2,206.94	\$2,700.17	\$533.43		\$533.43	\$6,794.60
					\$490.16	\$490.16			\$0.00	\$490.16
\$464.76	\$1,366.74					\$1,831.50	\$1,687.68		\$1,687.68	\$3,598.20
						\$0.00			\$0.00	\$342.29
\$83.00	\$29.15					\$112.15	\$563.40		\$563.40	\$9,864.99
\$19.99	\$191.88				\$270.00	\$481.87		\$524.20	\$524.20	\$1,106.17
	\$20.00				\$250.00	\$270.00	\$6,205.99		\$6,205.99	\$6,475.99
					\$142.60	\$142.60			\$0.00	\$234.18
		\$3.56	\$21.88		\$325.31	\$350.75	\$34.89	\$4,041.36	\$4,076.25	\$4,504.39
\$2,059.94	\$2,523.97	\$3.56	\$189.59	\$380.44	\$6,280.04	\$17,385.12	\$9,407.69	\$7,572.81	\$16,980.50	\$52,495.06

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Dec 2023 to Dec 2024

Options: Activity Only

4/30/24

HS 23-24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$684,597.00	\$242,443.89	\$442,153.11	35.41%
4200 - Miscellaneous Revenue	\$0.00	\$7,924.80	(\$7,924.80)	0.00%
4500 - Federal Revenue	\$3,510,751.00	\$1,472,548.00	\$2,038,203.00	41.94%
Total - Income	\$4,195,348.00	\$1,722,916.69	\$2,472,431.31	41.07%
Gross Profit	\$4,195,348.00	\$1,722,916.69	\$2,472,431.31	41.07%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$2,038,720.00	\$823,664.59	\$1,215,055.41	40.40%
7230 - Pension plan contributions	\$202,000.00	\$58,491.79	\$143,508.21	28.96%
7240 - Employee benefits - not pension	\$273,476.00	\$120,696.03	\$152,779.97	44.13%
7250 - Payroll taxes, etc.	\$215,533.00	\$67,033.71	\$148,499.29	31.10%
Total - 7200 - Salaries & related expenses	\$2,729,729.00	\$1,069,886.12	\$1,659,842.88	39.19%
7300 - Indirect Cost Pool Expense	\$536,183.00	\$217,472.44	\$318,710.56	40.56%
7500 - Contract/Consultant Services	\$46,700.00	\$16,384.46	\$30,315.54	35.08%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$13,250.00	\$59,409.17	(\$46,159.17)	448.37%
8120 - Other/Maint Supplies	\$0.00	\$11,157.46	(\$11,157.46)	0.00%
8130 - Telephone & Internet	\$0.00	\$20,804.44	(\$20,804.44)	0.00%
8140 - Postage & shipping	\$0.00	\$431.56	(\$431.56)	0.00%
8150 - Medical/Dental Supplies	\$0.00	\$13,792.77	(\$13,792.77)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$113.90	(\$113.90)	0.00%
8170 - Printing & copying	\$0.00	\$4,480.00	(\$4,480.00)	0.00%
8180 - Fatherhood	\$1,000.00	\$0.00	\$1,000.00	0.00%
Total - 8100 - Non personnel expenses	\$14,250.00	\$110,189.30	(\$95,939.30)	773.26%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$1,603.55	(\$1,603.55)	0.00%
8220 - Electric	\$35,000.00	\$15,999.52	\$19,000.48	45.71%
8225 - Water	\$0.00	\$1,944.51	(\$1,944.51)	0.00%
8230 - Trash	\$0.00	\$3,927.30	(\$3,927.30)	0.00%
8235 - Sewer	\$0.00	\$1,511.97	(\$1,511.97)	0.00%
8240 - Natural Gas	\$0.00	\$1,517.37	(\$1,517.37)	0.00%
8250 - Equip & Over \$5000.00 (Inv Items)	\$0.00	\$5,057.86	(\$5,057.86)	0.00%
8260 - Repair/Maint for Building/Equip	\$14,208.00	\$16,394.60	(\$2,186.60)	115.39%
Total - 8200 - Facility & equipment expenses	\$49,208.00	\$47,956.68	\$1,251.32	97.46%
8300 - Travel & meetings expenses	\$20,400.00	\$20,523.08	(\$123.08)	100.60%
8400 - Insurance Expense	\$23,500.00	\$76,352.55	(\$52,852.55)	324.90%
8700 - Food Expenses	\$46,800.00	\$70,652.03	(\$23,852.03)	150.97%
8800 - In-Kind Expenses	\$684,597.00	\$242,443.89	\$442,153.11	35.41%
Total - Expense	\$4,151,367.00	\$1,871,860.55	\$2,279,506.45	45.09%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$43,981.00	\$67,634.10	(\$23,653.10)	153.78%
Total - Other Expense	\$43,981.00	\$67,634.10	(\$23,653.10)	153.78%
Net Income	\$0.00	(\$216,577.96)	\$216,577.96	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Dec 2023 to Dec 2024

Options: Activity Only

EHS 23-24

4/30/24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$193,091.00	\$26,140.56	\$166,950.44	13.54%
4500 - Federal Revenue	\$999,189.00	\$373,976.00	\$625,213.00	37.43%
Total - Income	\$1,192,280.00	\$400,116.56	\$792,163.44	33.56%
Gross Profit	\$1,192,280.00	\$400,116.56	\$792,163.44	33.56%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$512,515.00	\$205,788.33	\$306,726.67	40.15%
7230 - Pension plan contributions	\$50,593.00	\$12,393.64	\$38,199.36	24.50%
7240 - Employee benefits - not pension	\$68,696.00	\$30,377.15	\$38,318.85	44.22%
7250 - Payroll taxes, etc.	\$53,984.00	\$16,902.18	\$37,081.82	31.31%
Total - 7200 - Salaries & related expenses	\$685,788.00	\$265,461.30	\$420,326.70	38.71%
7300 - Indirect Cost Pool Expense	\$134,791.00	\$48,535.42	\$86,255.58	36.01%
7500 - Contract/Consultant Services	\$2,500.00	\$2,307.11	\$192.89	92.28%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$34,340.00	\$16,404.40	\$17,935.60	47.77%
8120 - Other/Maint Supplies	\$0.00	\$2,057.55	(\$2,057.55)	0.00%
8130 - Telephone & Internet	\$0.00	\$2,750.76	(\$2,750.76)	0.00%
8140 - Postage & shipping	\$0.00	\$92.52	(\$92.52)	0.00%
8150 - Medical/Dental Supplies	\$0.00	\$2,913.29	(\$2,913.29)	0.00%
8170 - Printing & copying	\$0.00	\$953.26	(\$953.26)	0.00%
8180 - Fatherhood	\$2,500.00	\$0.00	\$2,500.00	0.00%
Total - 8100 - Non personnel expenses	\$36,840.00	\$25,171.78	\$11,668.22	68.33%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$82.10	(\$82.10)	0.00%
8220 - Electric	\$25,500.00	\$3,726.63	\$21,773.37	14.61%
8225 - Water	\$0.00	\$653.76	(\$653.76)	0.00%
8230 - Trash	\$0.00	\$775.22	(\$775.22)	0.00%
8235 - Sewer	\$0.00	\$361.02	(\$361.02)	0.00%
8240 - Natural Gas	\$0.00	\$692.69	(\$692.69)	0.00%
8250 - Equip & Over \$5000.00 (Inv Items)	\$0.00	\$1,084.33	(\$1,084.33)	0.00%
8260 - Repair/Maint for Building/Equip	\$27,000.00	\$5,435.52	\$21,564.48	20.13%
Total - 8200 - Facility & equipment expenses	\$52,500.00	\$12,811.27	\$39,688.73	24.40%
8300 - Travel & meetings expenses	\$39,000.00	\$2,125.36	\$36,874.64	5.45%
8400 - Insurance Expense	\$13,500.00	\$21,381.26	(\$7,881.26)	158.38%
8700 - Food Expenses	\$22,070.00	\$21,620.87	\$449.13	97.96%
8800 - In-Kind Expenses	\$0.00	\$26,140.56	(\$26,140.56)	0.00%
Total - Expense	\$986,989.00	\$425,554.93	\$561,434.07	43.12%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$42,800.00	\$18,286.10	\$24,513.90	42.72%
Total - Other Expense	\$42,800.00	\$18,286.10	\$24,513.90	42.72%
Net Income	\$162,491.00	(\$43,724.47)	\$206,215.47	-26.91%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2023 to Dec 2024

Options: Activity Only

EHS CC

4/30/24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$0.00	\$3,398.05	(\$3,398.05)	0.00%
4500 - Federal Revenue	\$2,216,745.00	\$1,423,798.00	\$792,947.00	64.23%
Total - Income	\$2,216,745.00	\$1,427,196.05	\$789,548.95	64.38%
Gross Profit	\$2,216,745.00	\$1,427,196.05	\$789,548.95	64.38%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$471,363.00	\$318,136.01	\$153,226.99	67.49%
7230 - Pension plan contributions	\$37,710.00	\$26,770.76	\$10,939.24	70.99%
7240 - Employee benefits - not pension	\$60,782.00	\$49,012.51	\$11,769.49	80.64%
7250 - Payroll taxes, etc.	\$40,302.00	\$25,190.73	\$15,111.27	62.50%
Total - 7200 - Salaries & related expenses	\$610,157.00	\$419,110.01	\$191,046.99	68.69%
7300 - Indirect Cost Pool Expense	\$123,968.00	\$83,926.65	\$40,041.35	67.70%
7500 - Contract/Consultant Services	\$1,016,075.00	\$660,104.17	\$355,970.83	64.97%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$64,000.00	\$96,330.58	(\$32,330.58)	150.52%
8120 - Other/Maint Supplies	\$5,000.00	\$5,466.46	(\$466.46)	109.33%
8130 - Telephone & Internet	\$14,400.00	\$3,090.56	\$11,309.44	21.46%
8140 - Postage & shipping	\$0.00	\$300.83	(\$300.83)	0.00%
8150 - Medical/Dental Supplies	\$1,000.00	\$7,751.19	(\$6,751.19)	775.12%
8160 - Events/Meeting Expense	\$0.00	\$24.02	(\$24.02)	0.00%
8170 - Printing & copying	\$15,000.00	\$4,137.26	\$10,862.74	27.58%
8180 - Fatherhood	\$2,000.00	\$0.00	\$2,000.00	0.00%
Total - 8100 - Non personnel expenses	\$101,400.00	\$117,100.90	(\$15,700.90)	115.48%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$464.31	(\$464.31)	0.00%
8220 - Electric	\$720.00	\$5,357.64	(\$4,637.64)	744.12%
8225 - Water	\$500.00	\$152.19	\$347.81	30.44%
8230 - Trash	\$300.00	\$506.95	(\$206.95)	168.98%
8235 - Sewer	\$300.00	\$73.05	\$226.95	24.35%
8240 - Natural Gas	\$500.00	\$460.19	\$39.81	92.04%
8250 - Equip & Over \$5000.00 (Inv Items)	\$122,122.00	\$2,709.51	\$119,412.49	2.22%
8260 - Repair/Maint for Building/Equip	\$47,250.00	\$5,160.55	\$42,089.45	10.92%
Total - 8200 - Facility & equipment expenses	\$171,692.00	\$14,884.39	\$156,807.61	8.67%
8300 - Travel & meetings expenses	\$17,750.00	\$11,008.12	\$6,741.88	62.02%
8400 - Insurance Expense	\$6,300.00	\$24,108.31	(\$17,808.31)	382.67%
8700 - Food Expenses	\$3,000.00	\$156.00	\$2,844.00	5.20%
8800 - In-Kind Expenses	\$0.00	\$3,398.05	(\$3,398.05)	0.00%
Total - Expense	\$2,050,342.00	\$1,333,796.60	\$716,545.40	65.05%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$168,403.00	\$193,281.18	(\$24,878.18)	114.77%
Total - Other Expense	\$168,403.00	\$193,281.18	(\$24,878.18)	114.77%
Net Income	(\$2,000.00)	(\$99,881.73)	\$97,881.73	4,994.09%

Funding Opportunity:	Father's Forward Fatherhood Program
Funding Entity:	Oklahoma Department of Human Services
Amount Requested:	\$900,000

LIFT Community Action Agency, Inc. is requesting the Board's approval to submit an application to the Oklahoma Department of Human Services for their opportunity to expand their Father's Forward Initiative. If awarded, LIFT CAA will create the **Choctaw County Strong Fathers Program**. In alignment with goals established by OKDHS, this program would seek to accomplish the following:

- Increase fathers' parenting knowledge and skills
- Enhance fathers' relationship skills and co-parenting relationship quality, and
- Improve economic stability for fathers and families

While the program will be inclusive of any eligible father, there will be a special emphasis on recruiting low-income fathers as this group often has greater risk factors related to parenting, economic, and relationship success. Individuals in the special emphasis group may include: non-custodial and custodial single fathers; married fathers; cohabitating fathers, fathers who are eligible for, receive, or have received TANF assistance; incarcerated and/or recently released fathers, stepfathers, and any person serving in some capacity as a father/father figure to children.

This program would result in the creation of three new jobs and serve 225 Fathers/Father Figures over the 3 year project period. Award announcements are expected to occur in October of 2024.

Funding Opportunity:	Father's Forward Fatherhood Program
Funding Entity:	Oklahoma Department of Human Services
Amount Requested:	\$900,000

LIFT Community Action Agency, Inc. is requesting the Board's approval to submit an application to the Oklahoma Department of Human Services for their opportunity to expand their Father's Forward Initiative. If awarded, LIFT CAA will create the **McCurtain County Strong Fathers Program**. In alignment with goals established by OKDHS, this program would seek to accomplish the following:

- Increase fathers' parenting knowledge and skills
- Enhance fathers' relationship skills and co-parenting relationship quality, and
- Improve economic stability for fathers and families

While the program will be inclusive of any eligible father, there will be a special emphasis on recruiting low-income fathers as this group often has greater risk factors related to parenting, economic, and relationship success. Individuals in the special emphasis group may include: non-custodial and custodial single fathers; married fathers; cohabitating fathers, fathers who are eligible for, receive, or have received TANF assistance; incarcerated and/or recently released fathers, stepfathers, and any person serving in some capacity as a father/father figure to children.

This program would result in the creation of three new jobs and serve 225 Fathers/Father Figures over the 3 year project period. Award announcements are expected to occur in October of 2024.

Funding Opportunity:	Father's Forward Fatherhood Program
Funding Entity:	Oklahoma Department of Human Services
Amount Requested:	\$900,000

LIFT Community Action Agency, Inc. is requesting the Board's approval to submit an application to the Oklahoma Department of Human Services for their opportunity to expand their Father's Forward Initiative. If awarded, LIFT CAA will create the **Pushmataha County Strong Fathers Program**. In alignment with goals established by OKDHS, this program would seek to accomplish the following:

- Increase fathers' parenting knowledge and skills
- Enhance fathers' relationship skills and co-parenting relationship quality, and
- Improve economic stability for fathers and families

While the program will be inclusive of any eligible father, there will be a special emphasis on recruiting low-income fathers as this group often has greater risk factors related to parenting, economic, and relationship success. Individuals in the special emphasis group may include: non-custodial and custodial single fathers; married fathers; cohabitating fathers, fathers who are eligible for, receive, or have received TANF assistance; incarcerated and/or recently released fathers, stepfathers, and any person serving in some capacity as a father/father figure to children.

This program would result in the creation of three new jobs and serve 225 Fathers/Father Figures over the 3 year project period. Award announcements are expected to occur in October of 2024.

**Raising Resilient
Oklahomans!**



Supporting Resilient Communities Across Oklahoma

KNOW AND GROW OKLAHOMA REQUEST FOR PROPOSAL FOR FAMILY RESOURCE CENTER/FAMILY RESOURCE HUB FUNDING

The Potts Family Foundation is pleased to issue this RFP for the purpose of funding a number of Family Resource Centers and Family Resource Hubs across the state. Please note there is an opportunity to submit questions by 11:59 p.m. **Monday, February 26th**. Please send all questions to arpa@pottsfamilyfoundation.org. Questions **will not** be answered individually, but will be answered in one document for all to see.

The full Request for Proposal documents can be found here - <https://pottsfamilyfoundation.org/arpa/>. The Q & A will be posted there as well by 8:00 a.m. Thursday, February 29th, if not sooner..

Please feel free to share this newsletter announcement with interested others. If this was shared with you, you can click here to subscribe

= <https://dashboard.mailerlite.com/forms/776589/11056723986061...>

Potts Family Foundation
909 E. Britton Road, Oklahoma City,
Oklahoma 73114



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What is a Family Resource Center?

A community or school-based welcoming hub of support, services, and opportunities for families that:

- Utilizes an approach that is multi-generational, strengths-based, and family-centered
- Reflects and is responsive to community needs and interests
- Provides support at no or low cost for participants
- Builds communities of peer support for families to develop social connections that reduce isolation and stress



What do FRCs do?

- Enhance parenting skills
- Foster the healthy development and well-being of children, youth, and families
- Prevent child abuse and neglect
- Increase school readiness
- Connect families to resources
- Develop parent and community leadership
- Engage males and fathers
- Support healthy marital and couples relationships
- Promote family economic success



What are the goals of a FRC?

- To support families to be strong, healthy, and successful
- To contribute to building a strong and healthy community
- To reduce the likelihood of child abuse and neglect by building the research-based Strengthening Families Protective Factors¹

What services do FRCs most commonly offer?²

- Parenting Support
- Access to Resources
- Child Development Activities
- Parent Leadership Development



What outcomes do FRCs achieve?



- \$4.93 Social Return on Investment for every dollar invested ³
- \$3.65 savings for the child welfare system for every dollar invested ⁴



- 63% reduction of child abuse cases ⁵
- 50% reduction of out of home placements ⁶
- 26% lower rates of community-level child abuse investigations ⁷



- Gains in economic self-sufficiency, health, social support, family functioning and resiliency, child nurturing and healthy attachment ⁸
- Improvements in children's educational success ⁹



What locations have invested in FRCs being available for all families?



Kentucky

888 school-based Family Resource and Youth Service Centers



New Jersey

57 Family Success Centers across all of its 21 counties



Vermont

15 Parent Child Centers, one in each service area



Allegheny County, PA

28 Family Support Centers



San Francisco, CA

26 Family Resource Centers

Did you know?

- Although there is no dedicated federal funding for Family Resource Centers, there are more than 3,000 of them nationwide in 39 states and the District of Columbia that serve more than 2 million people annually.
- The heritage of Family Resource Centers in the U.S. goes back to the establishment of Settlement Houses in the late 1800s to support new immigrants to succeed.



Good Samaritan Settlement House

San Francisco, CA
1913



Good Samaritan Family Resource Center today

What does it cost to run a FRC?

FRC budgets vary across the country in relation to local costs of living, specific programming, and physical space.

- A typical community-based New Jersey Success Center has an annual budget of \$240,000 to \$300,000 with 3-4 full-time staff.
- A school-based FRC in Kentucky has an annual budget of \$33,000-\$82,000 with 1-2 full-time staff and space and other resources provided in-kind.

Sources:

- ¹ Center for the Study of Social Policy. (2005). Strengthening Families: A Protective Factors Framework.
- ² OMNI Institute. (2016). Advancing the Family Support & Strengthening Field Project Survey Results.
- ³ Community Services Analysis LLC. (2014). Social Return on Investment Study.
- ⁴ OMNI Institute (2021). Return on Investment of a Family Resource Center to the Child Welfare System: Westminster Family Resource Center, Orange County, CA.
- ⁵ OMNI Institute (2021). Return on Investment of a Family Resource Center to the Child Welfare System: Community Partnership Family Resource Center, Teller County, CO.
- ⁶ Colorado Community Response Evaluation Findings 2014-2018.
- ⁷ Chapin Hall. (2018). Do Family Support Centers Reduce Maltreatment Investigations? Evidence from Allegheny County.
- ⁸ Family Pathways & CFSA 2.0 Evaluation Report - Executive Summary 2019.
- ⁹ Family Resource and Youth Services Centers of Kentucky.



NATIONAL
Family Support
NETWORK

www.nationalfamilysupportnetwork.org



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

March 27, 2024

Rebecca Porter, Executive Director
LIFT Community Action Agency
209 North 4th
Hugo, OK 74743

Dear Ms. Porter:

The third allocation for the FY'24 Community Services Block Grant (CSBG) has been received by the Oklahoma Department of Commerce/Community Development (ODOC/CD). These funds are awarded by the U.S. Department of Health and Human Services/ Office of Community Services for the purpose of revitalizing communities and the creation of opportunities for economic prosperity among low-income individuals and families.

Your agency's allocation is:

1st Allocation	\$31,632.00
2nd Allocation	\$50,347.00
3rd Allocation	\$37,275.00
	\$119,254.00

If your 24 contract status is "Executed", please proceed to OKGrants <https://grants.ok.gov> to request a revision. If your 24 contract status is *not* "Executed", you may include these funds with your in-process or pending application.

These funds may be used for expenses incurred on or after January 1, 2024 through September 30, 2025.

If you have questions please contact your CSBG Program Liaison or Shellie Schlegel at Shellie.Schlegel@okcommerce.gov.

Sincerely,

A handwritten signature in black ink that reads "Marshall L. Vogts".

Marshall Vogts, Director
Community Development

Week of the Young Child Grant

Elizabeth Thompson <ethompson@choctawnation.com>

Tue 4/2/2024 12:53 PM

📎 3 attachments (280 KB)

Outlook-Text Desc; Outlook-Text Desc; WOYC 2024 Order Form Packet.pdf;

Good afternoon!

Week of the Young Child is being celebrated next week! In an effort to provide more opportunities to the children enrolled in your child care program, Choctaw Nation Child Care Assistance would like to offer a **\$500 Week of the Young Child Grant for 2024!** It can be used at any 3 of our vendors - Kaplan, Lakeshore and Constructive Playthings (US Toy). I have attached order forms for each vendor. If you need the forms mailed to you, please let me know so I can get them in the mail this week.

Deadline for the Week of the Young Child order forms to be returned is Wednesday, May 15, 2024.

Please include facility name, delivery address and phone number on each form.

If you have any questions, please don't hesitate to reach out.

Yakoke!

Elizabeth Thompson | Program Manager | Child Care Assistance-477 Program
Choctaw Nation of Oklahoma | Phone: 580.642.7344 Fax: 580.920.4959



Living out the Chahta Spirit
 FAITH • FAMILY • CULTURE



2022 Winner – HRDUS Best Places to Work in U.S.

2022 Winner – Forbes Best Employer for Diversity (Travel and Leisure category)

2022 Winner – Forbes Best Employer for New Graduates

This message is intended only for the use of the individual or entity to which it is addressed and may contain information that is privileged, confidential and exempt from disclosure. If you have received this message in error, you are hereby notified that we do not consent to any reading, dissemination, distribution or copying of this message. If you have received this communication in error, please notify the sender immediately and destroy the transmitted information. Please note that any view or opinions presented in this email are solely those of the author and do not necessarily represent those of the Choctaw Nation.

Grant Application Invitation from The Potts Family Foundation

Cassady Dixon <cdixon@pottsfamilyfoundation.org>

Fri 3/8/2024 3:03 PM

To: Cassady Dixon <cdixon@pottsfamilyfoundation.org>

Congratulations! You are receiving this email because the Potts Family Foundation invites your organization to apply for innovation and pilot project funding during our 2024 Grant Cycle!

The Foundation's Grants Committee will award up to \$125,000 in grants to selected recipients.

The Foundation will take a slightly different approach to this year's granting process. Grant selections for 2024 will be awarded to fund the initial phase of projects with the potential for measurable systemic change. Projects should include a novel or innovative and collaborative approach to address one or more of the following areas:

1. Affordable, high-quality childcare and early learning environments
2. Evidence-based family support services
3. Development of child, family, and/or community resilience
4. Early relational health
5. Prevention and mitigation of adverse childhood experiences

Incorporating the above into an existing program could be considered for funding. However, applications to expand or maintain existing programs will not be considered. Evidence of incorporating existing community resources through collaboration will be viewed as a strength of any proposal.

Our single application is due by midnight on **April 15**, and we'll notify you of the board's decision around **late May/early June**. Please find our Foundant application portal [here](#). After you've logged in, use Access Code **PFF24** on the Apply page to begin.

Please note, your login is unique to our portal, and if you applied last year, it might help to check with others on your team that were involved so you don't duplicate efforts if they also received this email.

Please let us know if you have any questions and thank you for all that you do!

Kind regards,

Cassady Dixon
Office Administrator
Potts Family Foundation

Funding Entity: U.S. Department of Justice, Office on Violence Against Women
Funding Opportunity: FY 2024 Rural Domestic Violence, Dating Violence, Sexual Assault, and Stalking Program Grant
Amount Requested: \$815,000
Agency Program: Safe Place Healing Hearts Program

The Office on Violence Against Women, a component of the U.S. Department of Justice, was created in 1995 to provide national leadership on issues of sexual assault, domestic violence, dating violence, and stalking. Since its inception, OVW has supported a multi-faceted approach to responding to these crimes through the implementation of grant programs authorized by the Violence Against Women Act.

The Rural Domestic Violence, Dating Violence, Sexual Assault, and Stalking Program (also called the Rural Program) recognizes that victims of such crimes living in rural jurisdictions face unique barriers to receiving assistance and additional challenges rarely encountered in urban areas. Therefore, the primary purpose of the Rural Program Grant project will be to enhance the safety of child, youth and adult victims of domestic violence, dating violence, sexual assault, and stalking by supporting collaborative programs that help provide victims with the services they need to pursue safe and healthy lives, while enabling communities to hold offenders accountable. Through this grant project, we will maintain and continue to build State and local partnerships with law enforcement personnel, prosecutors, the judiciary, victim advocates, community organizations, and others in order to overcome the problem of domestic violence, dating violence, sexual assault, and stalking, and to ensure that victim safety is a top priority in providing services to victims and their children.

With the Board's approval, we are requesting \$815,000 from the U.S. Department of Justice for a three-year Rural Program Grant. Funding will support continued operations of the Safe Place Healing Hearts Program, along with the salaries of three staff members, who will continue to build the capacity of our rural communities to ensure the safety of and enhance services for all victims of domestic/dating violence, sexual assault and stalking. This will be accomplished in all three service counties by:

1. Working directly with professionals who impact victims of sexual assault, domestic/dating violence, and stalking through the provision of free training, technical assistance, and materials;
2. Collaborating with victim service agencies, law enforcement, and faith/community-based organizations to maintain Community Response Teams and Sexual Assault Response Teams;
3. Providing advocacy, case management, and other resources for victims; and
4. Promoting awareness and prevention of these crimes by conducting public presentations at area schools, community centers, fairs, or other forums.

Funding Opportunity: Second Chance: Community-Based Reentry

Funding Entity: Office of Justice Programs: Bureau of Justice Assistance

Amount Requested: \$750,000

LIFT Community Action Agency, Inc. is requesting the Board's approval to submit an application to the U.S. Department of Justice, Office of Justice Programs, Bureau of Justice Assistance in the amount of \$750,000. This opportunity is for the Second Chance Act: Community-Based Reentry program that seeks to help offenders with reentry into society following incarceration. If awarded, LIFT CAA's Southeast Oklahoma Second Chance Program would partner with County Sheriff's/Jails to provide services to offenders both pre and post release. The purpose is to develop a comprehensive, multi-disciplinary best practices community-based reentry program for offenders in Choctaw, McCurtain and Pushmataha Counties.

Project activities would include establishing a Reentry Advisory Board; Developing an Action plan; Implementing evidence-based risk and need screening and assessments tools; Developing and implementing a Multi-Disciplinary Reentry Collaborative Case Management and Coordination Team and Designating Community-based and Peer Recovery Support Specialists to provide Post-release Care Coordination.

Expected outcomes include the development of one multi-disciplinary team to address the reentry needs of individuals exiting the Choctaw, McCurtain and Pushmataha County jails; provision of evidence-based services; reduction in recidivism by 15% from baseline in Choctaw, McCurtain and Pushmataha Counties; 25% increase in participants knowledge/access to resources from entry to program completion and regular program tracking of outcomes.

LIFT CAA's Second Chance Program, in coordination with Law Enforcement and Community partners would provide vocational skills training, job preparation, career exploration and planning, life-skills courses, transportation, housing services, and more. The subrecipient Co-applicant law-enforcement agencies would conduct risk assessments, refer participants, raise program awareness and participate in both pre and post release programming to include delivery of Thinking For A Change evidence-based curriculum. This project would serve 240 offenders over the three year period. The project period of performance would be from October 1, 2024 through September 30, 2027.

Funding Entity: Addressing Hunger Relief in Southeastern Oklahoma
Opportunity: RSVP
Amount Requested: \$15,000

Hunger is a critical community need, especially among vulnerable populations in Southeast Oklahoma. This area represents food desserts and the emergency food supply for families is very limited. While food banks do exist, they rely heavily on local donations and area faith-based and non-profit organizations to replenish the food supply. The demand far outweighs the supply. The elderly and children are two very vulnerable populations affected most by food insecurity. This initiative will serve as a resource for four area food banks in the area. Objective 1, 750 participants will have increased food supply; Objective 2: Food bank providers will be more adequately stocked with supplies, food & volunteers to address the area's food insecurities.

LCAA serves Choctaw, McCurtain, and Pushmataha Counties in southeast Oklahoma, which has a total population of 55,736 and covers more than 4,000 square miles. Within the report area, 22.47% or 12,278 individuals live below the federal poverty level, making them at-risk for food insecurity. U.S. Census Quick facts estimates for 2023 (most recent data available) show that 18.80% of the population under age 65 have a disability.

Food insecurity is described as the uncertain availability of nutritionally adequate food. This is an issue affecting people across race, origin, gender, and age. Often, the costs of keeping pantries stocked is insurmountable for area food banks. Currently, emergency food providers are assisted by community volunteers in an effort to help alleviate the problem of food insecurity by helping low-income individuals and families access free or low-cost emergency food assistance. It is LCAA's hope that by bringing back the "Addressing Hunger in Southeast Oklahoma" initiative, residents will have increased access to nutritionally adequate food and food insecurity will be significantly reduced. This initiative will serve to support the goals through the provision of funding to help local food banks increase their food supply, ensuring those in need have adequate resources. The timeline will be for 12 months from June 1, 2024 through May 2025. Over the 12 months, food will be purchased and delivered and distributed via the four food banks.

PUSHMATAHA COUNTY HISTORICAL SOCIETY
P O BOX 285
ANTLERS, OK 74523

88-339/1031

2327

DATE MAR 28, 2024© 2014 FirstBank
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Security features
are on the back.PAY TO
THE ORDER OFLIFT - RSVPFIVE HUNDRED & 00/100\$ 500.00

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FirstBank
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100 North High Antlers, Oklahoma 74523

MEMO DONATION - RSVP

MP

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LOOK FOR FRAUD-DETECTING FEATURES INCLUDING THE SECURITY SQUARE AND HEAT-REACTIVE INK. DETAILS ON BACK.

PUSHMATAHA COUNTY HISTORICAL SOCIETY
P O BOX 285
ANTLERS, OK 74523

86-339/1031

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DATE MAR 28, 2024© 2011 FIRST BANK OF OKLAHOMA
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— Since 1901 —

100 North High Antlers, Oklahoma 74523

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LOOK FOR FRAUD-DETECTING FEATURES INCLUDING THE SECURITY SQUARE AND HEAT-REACTIVE INK. DETAILS ON BACK.



Department of Health and Human Services
Health Resources and Services Administration

Notice of Award
FAIN# H4927826
Federal Award Date: 04/01/2024

Recipient Information	Federal Award Information																								
1. Recipient Name LIFT COMMUNITY ACTION AGENCY, INC. 209 N 4th St Hugo, OK 74743-3809	11. Award Number 4 H49MC27826-10-03																								
2. Congressional District of Recipient 02	12. Unique Federal Award Identification Number (FAIN) H4927826																								
3. Payment System Identifier (ID) 1730772321A1	13. Statutory Authority 42 U.S.C. § 254c-8																								
4. Employer Identification Number (EIN) 730772321	14. Federal Award Project Title Healthy Start Initiative-Eliminating Racial/Ethnic Disparities																								
5. Data Universal Numbering System (DUNS) 095453171	15. Assistance Listing Number 93.926																								
6. Recipient's Unique Entity Identifier XL9DVU1YDGU2	16. Assistance Listing Program Title Healthy Start Initiative																								
7. Project Director or Principal Investigator Pam Waugh Program Director pwaugh@littledixie.org (580)326-6441	17. Award Action Type Change in Budget Period/Project Period; With or Without funds																								
8. Authorized Official	18. Is the Award R&D? No																								
Federal Agency Information	<table border="1"> <thead> <tr> <th colspan="2">Summary Federal Award Financial Information</th> </tr> </thead> <tbody> <tr> <td>19. Budget Period Start Date 04/01/2023 - End Date 04/30/2024</td> <td></td> </tr> <tr> <td>20. Total Amount of Federal Funds Obligated by this Action</td> <td>\$95,343.00</td> </tr> <tr> <td>20a. Direct Cost Amount</td> <td></td> </tr> <tr> <td>20b. Indirect Cost Amount</td> <td>\$134,265.00</td> </tr> <tr> <td>21. Authorized Carryover</td> <td>\$0.00</td> </tr> <tr> <td>22. Offset</td> <td>\$0.00</td> </tr> <tr> <td>23. Total Amount of Federal Funds Obligated this budget period</td> <td>\$1,254,464.00</td> </tr> <tr> <td>24. Total Approved Cost Sharing or Matching, where applicable</td> <td>\$0.00</td> </tr> <tr> <td>25. Total Federal and Non-Federal Approved this Budget Period</td> <td>\$1,254,464.00</td> </tr> <tr> <td>26. Project Period Start Date 04/01/2019 - End Date 04/30/2024</td> <td></td> </tr> <tr> <td>27. Total Amount of the Federal Award including Approved Cost Sharing or Matching this Project Period</td> <td>\$5,840,127.00</td> </tr> </tbody> </table>	Summary Federal Award Financial Information		19. Budget Period Start Date 04/01/2023 - End Date 04/30/2024		20. Total Amount of Federal Funds Obligated by this Action	\$95,343.00	20a. Direct Cost Amount		20b. Indirect Cost Amount	\$134,265.00	21. Authorized Carryover	\$0.00	22. Offset	\$0.00	23. Total Amount of Federal Funds Obligated this budget period	\$1,254,464.00	24. Total Approved Cost Sharing or Matching, where applicable	\$0.00	25. Total Federal and Non-Federal Approved this Budget Period	\$1,254,464.00	26. Project Period Start Date 04/01/2019 - End Date 04/30/2024		27. Total Amount of the Federal Award including Approved Cost Sharing or Matching this Project Period	\$5,840,127.00
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9. Awarding Agency Contact Information Tya T Renwick Grants Management Specialist Office of Federal Assistance Management (OFAM) Division of Grants Management Office (DGMO) trenwick@hrsa.gov (301) 594-0227	28. Authorized Treatment of Program Income Addition																								
10. Program Official Contact Information Shontelle Dixon Project Officer Maternal and Child Health Bureau (MCHB) sdixon@hrsa.gov (301) 443-0543	29. Grants Management Officer – Signature LaShawna Smith on 04/01/2024																								
30. Remarks																									



Notice of Award
Award Number: 4 H49MC27826-10-03
Federal Award Date: 04/01/2024

Maternal and Child Health Bureau (MCHB)

31. APPROVED BUDGET: (Excludes Direct Assistance) ☒ Grant Funds Only ☐ Total project costs including grant funds and all other financial participation <table><tr><td>a. Salaries and Wages:</td><td>\$583,758.00</td></tr><tr><td>b. Fringe Benefits:</td><td>\$199,120.00</td></tr><tr><td>c. Total Personnel Costs:</td><td>\$782,878.00</td></tr><tr><td>d. Consultant Costs:</td><td>\$0.00</td></tr><tr><td>e. Equipment:</td><td>\$0.00</td></tr><tr><td>f. Supplies:</td><td>\$30,952.00</td></tr><tr><td>g. Travel:</td><td>\$56,374.00</td></tr><tr><td>h. Construction/Alteration and Renovation:</td><td>\$0.00</td></tr><tr><td>i. Other:</td><td>\$179,173.00</td></tr><tr><td>j. Consortium/Contractual Costs:</td><td>\$70,822.00</td></tr><tr><td>k. Trainee Related Expenses:</td><td>\$0.00</td></tr><tr><td>l. Trainee Stipends:</td><td>\$0.00</td></tr><tr><td>m. Trainee Tuition and Fees:</td><td>\$0.00</td></tr><tr><td>n. Trainee Travel:</td><td>\$0.00</td></tr><tr><td>o. TOTAL DIRECT COSTS:</td><td>\$1,120,199.00</td></tr><tr><td>p. INDIRECT COSTS (Rate: % of S&W/TADC):</td><td>\$134,265.00</td></tr><tr><td> i. Indirect Cost Federal Share:</td><td>\$134,265.00</td></tr><tr><td> ii. Indirect Cost Non-Federal Share:</td><td>\$0.00</td></tr><tr><td>q. TOTAL APPROVED BUDGET:</td><td>\$1,254,464.00</td></tr><tr><td> i. Less Non-Federal Share:</td><td>\$0.00</td></tr><tr><td> ii. Federal Share:</td><td>\$1,254,464.00</td></tr></table>	a. Salaries and Wages:	\$583,758.00	b. Fringe Benefits:	\$199,120.00	c. Total Personnel Costs:	\$782,878.00	d. Consultant Costs:	\$0.00	e. Equipment:	\$0.00	f. Supplies:	\$30,952.00	g. Travel:	\$56,374.00	h. Construction/Alteration and Renovation:	\$0.00	i. Other:	\$179,173.00	j. Consortium/Contractual Costs:	\$70,822.00	k. Trainee Related Expenses:	\$0.00	l. Trainee Stipends:	\$0.00	m. Trainee Tuition and Fees:	\$0.00	n. Trainee Travel:	\$0.00	o. TOTAL DIRECT COSTS:	\$1,120,199.00	p. INDIRECT COSTS (Rate: % of S&W/TADC):	\$134,265.00	i. Indirect Cost Federal Share:	\$134,265.00	ii. Indirect Cost Non-Federal Share:	\$0.00	q. TOTAL APPROVED BUDGET:	\$1,254,464.00	i. Less Non-Federal Share:	\$0.00	ii. Federal Share:	\$1,254,464.00	33. RECOMMENDED FUTURE SUPPORT: (Subject to the availability of funds and satisfactory progress of project) <table><tr><th>YEAR</th><th>TOTAL COSTS</th></tr><tr><td colspan="2">Not applicable</td></tr></table> 34. APPROVED DIRECT ASSISTANCE BUDGET: (In lieu of cash) <table><tr><td>a. Amount of Direct Assistance</td><td>\$0.00</td></tr><tr><td>b. Less Unawarded Balance of Current Year's Funds</td><td>\$0.00</td></tr><tr><td>c. Less Cumulative Prior Award(s) This Budget Period</td><td>\$0.00</td></tr><tr><td>d. AMOUNT OF DIRECT ASSISTANCE THIS ACTION</td><td>\$0.00</td></tr></table> 35. FORMER GRANT NUMBER 36. OBJECT CLASS 41.51 37. BHCNIS#	YEAR	TOTAL COSTS	Not applicable		a. Amount of Direct Assistance	\$0.00	b. Less Unawarded Balance of Current Year's Funds	\$0.00	c. Less Cumulative Prior Award(s) This Budget Period	\$0.00	d. AMOUNT OF DIRECT ASSISTANCE THIS ACTION	\$0.00
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38. THIS AWARD IS BASED ON THE APPLICATION APPROVED BY HRSA FOR THE PROJECT NAMED IN ITEM 14. FEDERAL AWARD PROJECT TITLE AND IS SUBJECT TO THE TERMS AND CONDITIONS INCORPORATED EITHER DIRECTLY OR BY REFERENCE AS:

a. The program authorizing statue and program regulation cited in this Notice of Award; b. Conditions on activities and expenditures of funds in certain other applicable statutory requirements, such as those included in appropriations restrictions applicable to HRSA funds; c. 45 CFR Part 75; d. National Policy Requirements and all other requirements described in the HHS Grants Policy Statement; e. Federal Award Performance Goals; and f. The Terms and Conditions cited in this Notice of Award. In the event there are conflicting or otherwise inconsistent policies applicable to the award, the above order of precedence shall prevail. Recipients indicate acceptance of the award, and terms and conditions by obtaining funds from the payment system.

39. ACCOUNTING CLASSIFICATION CODES

FY-CAN	CFDA	DOCUMENT NUMBER	AMT. FIN. ASST.	AMT. DIR. ASST.	SUB PROGRAM CODE	SUB ACCOUNT CODE
24 - 3898020	93.926	19H49MC27826	\$81,666.00	\$0.00	N/A	19-HIS-ERED
24 - 38980CC	93.926	19H49MC27826	\$13,677.00	\$0.00	N/A	19-HIS-ERED

HRSA Electronic Handbooks (EHBs) Registration Requirements

The Project Director of the grant (listed on this NoA) and the Authorizing Official of the grantee organization are required to register (if not already registered) within HRSA's Electronic Handbooks (EHBs). Registration within HRSA EHBs is required only once for each user for each organization they represent. To complete the registration quickly and efficiently we recommend that you note the 10-digit grant number from box 4b of this NoA. After you have completed the initial registration steps (i.e., created an individual account and associated it with the correct grantee organization record), be sure to add this grant to your portfolio. This registration in HRSA EHBs is required for submission of noncompeting continuation applications. In addition, you can also use HRSA EHBs to perform other activities such as updating addresses, updating email addresses and submitting certain deliverables electronically. Visit <https://grants3.hrsa.gov/2010/WebEPSExternal/Interface/common/accesscontrol/login.aspx> to use the system. Additional help is available online and/or from the HRSA Call Center at 877-Go4-HRSA/877-464-4772.

Terms and Conditions

Failure to comply with the remarks, terms, conditions, or reporting requirements may result in a draw down restriction being placed on your Payment Management System account or denial of future funding.

Grant Specific Term(s)

1. This Notice of Award provides a one-month extension to support continued services (base and clinical) within your approved project area, until April 30, 2024. Awarded funds have been proportionately distributed across the approved budget categories. Up to 25% of the total approved budget may be reallocated within the approved categories without prior approval.
- All prior terms and conditions remain in effect unless specifically removed.

Contacts

NoA Email Address(es):

Name	Role	Email
Pam Waugh	Program Director	pwaugh@littledixie.org

Note: NoA emailed to these address(es)

All submissions in response to conditions and reporting requirements (with the exception of the FFR) must be submitted via EHBs. Submissions for Federal Financial Reports (FFR) must be completed in the Payment Management System (<https://pms.psc.gov/>).

Choctaw Nation of Oklahoma Child Care Stabilization Grant Awards, Year 3 (3rd Quarter):

Antlers Early Learning Center: \$7,000
 Broken Bow Early Learning Center: \$11,000
 Hugo Early Learning Center: \$7,000
 Idabel Early Learning Center: \$7,000
3rd Quarter Total: \$32,000

CNO Payment Remittance Advice

From Payer	Choctaw Nation of Oklahoma 1802 Chukka Hina Durant Oklahoma US 74701	Supplier or Party To Payee	LIFT COMMUNITY ACTION AGENCY INC LIFT COMMUNITY ACTION AGENCY INC 209 N 4TH ST Hugo OK US 74743
-------------------	---	---------------------------------------	---

Remittance Detail							
Document Reference Number	Description	Date	Currency	Document Amount	Amount Withheld	Discount Taken	Amount Paid
AB1017002	477 ARPA LIFT Antlers 04012024	04/01/2024	USD	7,000.00	0.00	0.00	7,000.00
Total					0.00	0.00	7,000.00

Remittance Detail							
Document Reference Number	Description	Date	Currency	Document Amount	Amount Withheld	Discount Taken	Amount Paid
AB1017002204012024	477 ARPA 04012024	04/01/2024	USD	7,000.00	0.00	0.00	7,000.00
AB1017002404012024	477 ARPA 04012024 LIFT Idabel	04/01/2024	USD	7,000.00	0.00	0.00	7,000.00
Total					0.00	0.00	14,000.00

Remittance Detail							
Document Reference Number	Description	Date	Currency	Document Amount	Amount Withheld	Discount Taken	Amount Paid
AB1017002104012024	477 ARPA 04012024 LIFT Community Action Agency	04/01/2024	USD	11,000.00	0.00	0.00	11,000.00
Total					0.00	0.00	11,000.00

LIFT Community Action, Inc.

CSBG-2024-LIFT CAA-00197**Contract Part I: 19394 CSBG 24**

FAIN #: 2401OKCOSR

UEI #: 0

FEI #:

730772321

**CONTRACT - MODIFICATION
PART I
SUMMARY AND SIGNATURES**

Contracting Agency:	Oklahoma Department of Commerce State of Oklahoma (ODOC)
Contractor:	LIFT Community Action Agency, Inc.
Contract Title:	ODOC Community Services Block Grant
Contract Number:	19394 CSBG 24
Federal Amount:	\$119,254.00
Match Amount:	\$0
Contract Amount:	\$119,254.00
Research and Development:	Not R&D Related
Indirect Cost Rate:	28.00
Grant Award Amount - This Action:	\$119,254.00
Total Committed:	\$119,254.00
Total Obligated:	\$119,254.00
Source:	U.S. Department of Health and Human Services Community Services Block Grant Act of 1981, as amended. (42 USC §§9901, et seq.; P.L. 97-35, Title VI, Subtitle B). Catalog of Federal Domestic Assistance (CFDA) Number 93.569
Project Funding Period:	January 1, 2024 through September 30, 2025
Federal Award Period:	October 1, 2023 through September 30, 2025

Summary of Project

FY24 Community Service Block Grant

Budget Summary

CDBG Funds
Construction -
Engineering/Architect -
Inspection -
Other -
Public Facilities Admin -
Direct Grantee Admin -
Planning -
TOTAL CDBG -
TOTAL LEVERAGE -
TOTAL FUNDS -

LIFT Community Action, Inc.

CSBG-2024-LIFT CAA-00197

Contract Part I: 19394 CSBG 24

Submit Requisitions to:	Issue Payment To:
Community Development	LIFT Community Action
	Agency, Inc.
Oklahoma Department of	209 N 4th St
Commerce	
900 North Stiles	Hugo, Oklahoma 74743
Oklahoma City, OK	
73104-3234	
AGREEMENT	Part I - Summary and
COMPONENTS:	Signatures

Part II - Terms and
Conditions
Certification Regarding
Lobbying

SPECIAL CONDITIONS:

SIGNATURES – EXECUTION OF CONTRACT

The rights and obligations of the parties to this contract are subject to and governed by Part II – Terms and Conditions. To the extent of any inconsistency between the general and the specific, the specific governs.

✓ I certify that I am authorized to sign this document, and any attachments or addendums thereto, and I have read and agree to all parts of the contract.

Executed by:	Executed by:
LIFT Community Action	Oklahoma Department of
Agency, Inc.	Commerce
Sheree Ensley	

	Marshall Vogts
Signature of Authorized	Signature of Authorized
Official	ODOC Official
4/15/2024	2/26/2024
Date	Date



OKLAHOMA CITY
COMMUNITY FOUNDATION

04/19/2024

Kathy James
LIFT Community Action Agency
209 North 4th St.
Hugo, OK 74743

Dear Kathy,

On behalf of the Carolyn Watson Community Foundation, an affiliate of the Oklahoma City Community Foundation, the enclosed check for **\$5,000.00** represents the awarded amount for the **Healthy Futures Project**.

We look forward to hearing about the impact of your work! Please feel free to contact me if you have questions or need additional information.

Sincerely,

Leslie Woodward
Community Programs Manager
Oklahoma City Community Foundation
P: (405) 606-2911
E: L.woodward@occf.org



OKLAHOMA CITY
COMMUNITY FOUNDATION

Simple. Effective. Forever.

1000 N. Broadway Ave • Oklahoma City, OK 73102

Five thousand and 00/100

PAY
TO THE
ORDER
OF

LIFT Community Action Agency
209 North 4th St.
Hugo, OK 74743

MEMO: Healthy Futures Project

MIDFIRST BANK
OKLAHOMA CITY, OKLAHOMA
www.midfirst.com
39-8799/3030
102

Item I6
Page 310000

DATE 04/17/2024

AMOUNT \$5,000.00



OKLAHOMA CITY COMMUNITY FOUNDATION, INC.

Cathy Lissard

AUTHORIZED SIGNATURE

⑈310000⑈ ⑆303087995⑆ ⑈5201019082⑈

OKLAHOMA CITY COMMUNITY FOUNDATION, INC.

310000

Grant 125401 :: Carolyn Watson Rural Oklahoma Community Foundation Affiliated Fund 5,000.00

CHECK TOTAL: **\$5,000.00

**HOME INVESTMENT PARTNERSHIPS
HOME PROGRAM
WRITTEN AGREEMENT
PART I**

This Written Agreement entered into by and between Oklahoma Housing Finance Agency, a state beneficiary public trust, as the State of Oklahoma's designated Participating Jurisdiction (PJ) for the **HOME** Program (OHFA) and LIFT Community Action Agency, Inc. ("LIFT") effective as of the 23rd day of April 2024.

SUMMARY

OHFA Contract Number: 23-HOME-1736

TERM OF THIS WRITTEN AGREEMENT: Date of Execution through – April 30, 2027

TYPE OF ACTIVITY: Single Family New Construction Rental

AFFORDABILITY:

Minimum Period in Years: 20 years

Deed Restrictions: X LURA: _____ Other:

HOME Funding Amount: \$ 750,000

Submit Reimbursement Report To: HOME Department
OHFA
P.O. Box 26720
Oklahoma City, OK 73126

Issue Payment To: LIFT Community Action Agency, Inc.
Rebecca Porter
209 N 4th Street
Hugo, OK 74743

Written Agreement Components: Part I-Summary and Signatures
Part II-Terms and Conditions
Part III-Special Conditions
Part IV-Budget

HOME Program Written Agreement

SIGNATURES FOR EXECUTION OF WRITTEN AGREEMENT

**HOME INVESTMENT PARTNERSHIPS
HOME PROGRAM
WRITTEN AGREEMENT
PART I**

OHFA and LIFT Community Action Agency, Inc. acknowledge and agree that the rights and obligations of each are subject to and governed by the federal HOME Program (24 CFR 92), The HOME Program Final Rule and other Federal Regulations as may be promulgated from time to time, OHFA HOME Program Rules and each of the terms and conditions set forth in Part I, Part II, Part III and Part IV to this Written Agreement, attached hereto and incorporated by this reference.

EXECUTED BY:
LIFT Community Action Agency, Inc.

Rebecca Porter
Signature
Rebecca Porter, Executive Director

Date 4/16/2024

State of Oklahoma, County of Choctaw
This Written Agreement was acknowledged
before me on the 16th of April 2024
by Rebecca Porter, Executive Director, LIFT
Community Action Agency, Inc.

Sherree Ensley
Typed Name, Sherree Ensley Notarial Officer
My commission expires: 9-13-2026



EXECUTED BY:
Oklahoma Housing Finance Agency

Deborah Jenkins
Signature
Deborah Jenkins, Executive Director

Date 4/23/2024

State of Oklahoma, County of Oklahoma.
This Written Agreement was acknowledged
before me on the 23 of April 2024
by Deborah Jenkins, Executive Director,
Oklahoma Housing Finance Agency

Emily Myers
Typed Name, Emily Myers, Notarial Officer
My commission expires: 3/4/2028



**PART IV
BUDGET**

<u>Cost Categories</u>	<u>Amount</u>
New Construction Cost	\$630,064
Land / Infrastructure/ Site Work	<u>\$8,000</u>
	\$638,064
 <u>Developer Fee</u>	 \$ 98,436
 Survey	 <u>\$ 1,500</u>
	 \$ 1,500
 Insurance	 <u>\$ 4,000</u>
	 <u>\$ 4,000</u>
	\$742,000
 Inspection Fee	 \$8,000
 Total HOME Project Funds	 \$750,000
 Total LIFT Banked Match	 \$187,500
 <u>Total</u>	 <u>\$937,500</u>

In monitoring the performance of LIFT, OHFA will also refer to the more detailed budget provided in the Application, which is a part of this Written Agreement and incorporated by reference.

All HOME Project Funds expended under this Written Agreement require a minimum of 25% in eligible match contributions. **Match liability is incurred at the time project funds are drawn.**

As set forth in the 2023 Action Plan for the HOME Program, OHFA requires that all applicants meet the full 25% Match requirement, regardless of any Match waivers or reductions by HUD. The Match you committed and identified in your application may be banked based upon submission of proper documentation if the HOME funds are drawn during the Match waiver period.



Award# 06CH012393-01-01

FAIN# 06CH012393

Federal Award Date: 04/23/2024

Recipient Information**1. Recipient Name**

LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO, OK 74743-3809
580-326-3351

2. Congressional District of Recipient

02

3. Payment System Identifier (ID)

1730772321A1

4. Employer Identification Number (EIN)

730772321

5. Data Universal Numbering System (DUNS)

095453171

6. Recipient's Unique Entity Identifier (UEI)

XL9DVU1YDGU2

7. Project Director or Principal Investigator

Ms. Darla Galyon
dgalyon@ldcaahs.org
580-326-7581

8. Authorized Official

Mr. David Hawkins
boardchair@liftca.org
(580) 326-7581

Federal Agency Information

ACF/OHS Region VI Grants Office

9. Awarding Agency Contact Information

Ms. Jennifer M Curtiss
Grants Management Officer
jennifer.curtiss@acf.hhs.gov
816-426-2991

10. Program Official Contact Information

Mr. Kenneth Gilbert
Regional Program Manager
HHS/ACF/OHS Region VI
kenneth.gilbert@acf.hhs.gov
214-767-8844

Federal Award Information**11. Award Number**

06CH012393-01-01

12. Unique Federal Award Identification Number (FAIN)

06CH012393

13. Statutory Authority

42 USC 9801 ET SEQ

14. Federal Award Project Title

Head Start and Early Head Start

15. Assistance Listing Number

93.600

16. Assistance Listing Program Title

Head Start

17. Award Action Type

Balance of Funds

18. Is the Award R&D?

No

Summary Federal Award Financial Information**19. Budget Period Start Date** 12/01/2023 - **End Date** 11/30/2024**20. Total Amount of Federal Funds Obligated by this Action** \$2,254,969.00

20a. Direct Cost Amount \$1,919,481.00

20b. Indirect Cost Amount \$335,488.00

21. Authorized Carryover \$0.00**22. Offset** \$0.00**23. Total Amount of Federal Funds Obligated this budget period** \$2,254,971.00**24. Total Approved Cost Sharing or Matching, where applicable** \$1,127,485.00**25. Total Federal and Non-Federal Approved this Budget Period** \$5,637,425.00**26. Period of Performance Start Date** 12/01/2023 - **End Date** 11/30/2028**27. Total Amount of the Federal Award including Approved Cost Sharing or Matching this Period of Performance** \$5,637,425.00**28. Authorized Treatment of Program Income**

ADDITIONAL COSTS

29. Grants Management Officer - Signature

Ms. Jennifer M Curtiss
Grants Management Officer

30. Remarks



Notice of Award

Award# 06CH012393-01-01

FAIN# 06CH012393

Federal Award Date: 04/23/2024

Recipient Information

Recipient Name

LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO, OK 74743-3809
580-326-3351

Congressional District of Recipient

02

Payment Account Number and Type

1730772321A1

Employer Identification Number (EIN) Data

730772321

Universal Numbering System (DUNS)

095453171

Recipient's Unique Entity Identifier (UEI)

XL9DVU1YDGU2

31. Assistance Type

Discretionary Grant

32. Type of Award

Service

33. Approved Budget

(Excludes Direct Assistance)

I. Financial Assistance from the Federal Awarding Agency Only

II. Total project costs including grant funds and all other financial participation

a. Salaries and Wages	\$2,551,235.00
b. Fringe Benefits	\$864,282.00
c. Total Personnel Costs	\$3,415,517.00
d. Equipment	\$0.00
e. Supplies	\$47,590.00
f. Travel	\$10,386.00
g. Construction	\$0.00
h. Other	\$302,273.00
i. Contractual	\$63,200.00
j. TOTAL DIRECT COSTS	\$3,838,966.00
k. INDIRECT COSTS	\$670,974.00
l. TOTAL APPROVED BUDGET	\$4,509,940.00
m. Federal Share	\$4,509,940.00
n. Non-Federal Share	\$1,127,485.00

34. Accounting Classification Codes

FY-ACCOUNT NO.	DOCUMENT NO.	ADMINISTRATIVE CODE	OBJECT CLASS	CFDA NO.	AMT ACTION FINANCIAL ASSISTANCE	APPROPRIATION
4-G064122	06CH01239301	ACFOHS	41.51	93.600	\$2,225,339.00	75-24-1536
4-G064121	06CH01239301	ACFOHS	41.51	93.600	\$9,652.00	75-24-1536
4-G064120	06CH01239301	ACFOHS	41.51	93.600	\$19,978.00	75-24-1536

30. REMARKS (Continued from previous page)

This action awards the balance of funds for Head Start and Early Head Start operations, Head Start training and technical assistance, and Early Head Start training and technical assistance for the 12/01/2023-11/30/2024 budget period.

Per ACF-PI-OHS-24-01 (Federal Reporting of Standard Forms 425 and 428), Federal awards that have budget periods starting on or after October 1, 2023 will be required to submit two Federal Financial Reports (SF-425) during a 12-month budget period. A Semi-annual Federal Financial Report (SF425) is due in PMS by 6/30/2024. An Annual Federal Financial Report is due 3/1/2025. If this is the last budget period of the project period, a Final Federal Financial Report is due 3/30/25.



Department of Health and Human Services
Health Resources and Services Administration

Notice of Award
FAIN# **H4927826**
Federal Award Date: **04/29/2024**

Recipient Information

1. Recipient Name
LIFT COMMUNITY ACTION AGENCY, INC.
209 N 4th St
Hugo, OK 74743-3809
2. Congressional District of Recipient
02
3. Payment System Identifier (ID)
1730772321A1
4. Employer Identification Number (EIN)
730772321
5. Data Universal Numbering System (DUNS)
095453171
6. Recipient's Unique Entity Identifier
XL9DVU1YDGU2
7. Project Director or Principal Investigator
Pam Waugh
Program Director
pam.waugh@liftca.org
(580)326-6441
8. Authorized Official
Rebecca Reynolds Porter
Executive Director
becky.reynolds@liftca.org
(580)326-3351

Federal Agency Information

9. Awarding Agency Contact Information
Tya T Renwick
Grants Management Specialist
Office of Federal Assistance Management (OFAM)
Division of Grants Management Office (DGMO)
trenwick@hrsa.gov
(301) 594-0227
10. Program Official Contact Information
Shontelle Dixon
Project Officer
Maternal and Child Health Bureau (MCHB)
sdixon@hrsa.gov
(301) 443-0543

Federal Award Information

11. Award Number
2 H49MC27826-11-00
12. Unique Federal Award Identification Number (FAIN)
H4927826
13. Statutory Authority
42 U.S.C. § 254c-8
14. Federal Award Project Title
Healthy Start Initiative-Eliminating Racial/Ethnic Disparities
15. Assistance Listing Number
93.926
16. Assistance Listing Program Title
Healthy Start Initiative
17. Award Action Type
Competing Continuation
18. Is the Award R&D?
No

Summary Federal Award Financial Information

19. Budget Period Start Date 05/01/2024 - End Date 03/31/2025	
20. Total Amount of Federal Funds Obligated by this Action	\$1,008,333.00
20a. Direct Cost Amount	
20b. Indirect Cost Amount	\$0.00
21. Authorized Carryover	\$0.00
22. Offset	\$0.00
23. Total Amount of Federal Funds Obligated this budget period	\$1,008,333.00
24. Total Approved Cost Sharing or Matching, where applicable	\$0.00
25. Total Federal and Non-Federal Approved this Budget Period	\$1,008,333.00
26. Project Period Start Date 05/01/2024 - End Date 03/31/2029	
27. Total Amount of the Federal Award including Approved Cost Sharing or Matching this Project Period	\$1,008,333.00

28. Authorized Treatment of Program Income
Addition
29. Grants Management Officer – Signature
LaShawna Smith on 04/29/2024

30. Remarks

This grant is under Expanded Authority.



Notice of Award
Award Number: 2 H49MC27826-11-00
Federal Award Date: 04/29/2024

Maternal and Child Health Bureau (MCHB)

31. APPROVED BUDGET: (Excludes Direct Assistance) ☒ Grant Funds Only ☐ Total project costs including grant funds and all other financial participation <table><tr><td>a. Salaries and Wages:</td><td>\$0.00</td></tr><tr><td>b. Fringe Benefits:</td><td>\$0.00</td></tr><tr><td>c. Total Personnel Costs:</td><td>\$0.00</td></tr><tr><td>d. Consultant Costs:</td><td>\$0.00</td></tr><tr><td>e. Equipment:</td><td>\$0.00</td></tr><tr><td>f. Supplies:</td><td>\$0.00</td></tr><tr><td>g. Travel:</td><td>\$0.00</td></tr><tr><td>h. Construction/Alteration and Renovation:</td><td>\$0.00</td></tr><tr><td>i. Other:</td><td>\$0.00</td></tr><tr><td>j. Consortium/Contractual Costs:</td><td>\$0.00</td></tr><tr><td>k. Trainee Related Expenses:</td><td>\$0.00</td></tr><tr><td>l. Trainee Stipends:</td><td>\$0.00</td></tr><tr><td>m. Trainee Tuition and Fees:</td><td>\$0.00</td></tr><tr><td>n. Trainee Travel:</td><td>\$0.00</td></tr><tr><td>o. TOTAL DIRECT COSTS:</td><td>\$1,008,333.00</td></tr><tr><td>p. INDIRECT COSTS (Rate: % of S&W/TADC):</td><td>\$0.00</td></tr><tr><td> i. Indirect Cost Federal Share:</td><td>\$0.00</td></tr><tr><td> ii. Indirect Cost Non-Federal Share:</td><td>\$0.00</td></tr><tr><td>q. TOTAL APPROVED BUDGET:</td><td>\$1,008,333.00</td></tr><tr><td> i. Less Non-Federal Share:</td><td>\$0.00</td></tr><tr><td> ii. Federal Share:</td><td>\$1,008,333.00</td></tr></table>	a. Salaries and Wages:	\$0.00	b. Fringe Benefits:	\$0.00	c. Total Personnel Costs:	\$0.00	d. Consultant Costs:	\$0.00	e. Equipment:	\$0.00	f. Supplies:	\$0.00	g. Travel:	\$0.00	h. Construction/Alteration and Renovation:	\$0.00	i. Other:	\$0.00	j. Consortium/Contractual Costs:	\$0.00	k. Trainee Related Expenses:	\$0.00	l. Trainee Stipends:	\$0.00	m. Trainee Tuition and Fees:	\$0.00	n. Trainee Travel:	\$0.00	o. TOTAL DIRECT COSTS:	\$1,008,333.00	p. INDIRECT COSTS (Rate: % of S&W/TADC):	\$0.00	i. Indirect Cost Federal Share:	\$0.00	ii. Indirect Cost Non-Federal Share:	\$0.00	q. TOTAL APPROVED BUDGET:	\$1,008,333.00	i. Less Non-Federal Share:	\$0.00	ii. Federal Share:	\$1,008,333.00	33. RECOMMENDED FUTURE SUPPORT: (Subject to the availability of funds and satisfactory progress of project) <table><tr><th>YEAR</th><th>TOTAL COSTS</th></tr><tr><td>12</td><td>\$1,100,000.00</td></tr><tr><td>13</td><td>\$1,100,000.00</td></tr><tr><td>14</td><td>\$1,100,000.00</td></tr><tr><td>15</td><td>\$1,100,000.00</td></tr></table> 34. APPROVED DIRECT ASSISTANCE BUDGET: (In lieu of cash) <table><tr><td>a. Amount of Direct Assistance</td><td>\$0.00</td></tr><tr><td>b. Less Unawarded Balance of Current Year's Funds</td><td>\$0.00</td></tr><tr><td>c. Less Cumulative Prior Award(s) This Budget Period</td><td>\$0.00</td></tr><tr><td>d. AMOUNT OF DIRECT ASSISTANCE THIS ACTION</td><td>\$0.00</td></tr></table> 35. FORMER GRANT NUMBER 36. OBJECT CLASS 41.51 37. BHCNIS#	YEAR	TOTAL COSTS	12	\$1,100,000.00	13	\$1,100,000.00	14	\$1,100,000.00	15	\$1,100,000.00	a. Amount of Direct Assistance	\$0.00	b. Less Unawarded Balance of Current Year's Funds	\$0.00	c. Less Cumulative Prior Award(s) This Budget Period	\$0.00	d. AMOUNT OF DIRECT ASSISTANCE THIS ACTION	\$0.00
a. Salaries and Wages:	\$0.00																																																												
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c. Less Cumulative Prior Award(s) This Budget Period	\$0.00																																																												
d. AMOUNT OF DIRECT ASSISTANCE THIS ACTION	\$0.00																																																												

38. THIS AWARD IS BASED ON THE APPLICATION APPROVED BY HRSA FOR THE PROJECT NAMED IN ITEM 14. FEDERAL AWARD PROJECT TITLE AND IS SUBJECT TO THE TERMS AND CONDITIONS INCORPORATED EITHER DIRECTLY OR BY REFERENCE AS:

a. The program authorizing statue and program regulation cited in this Notice of Award; b. Conditions on activities and expenditures of funds in certain other applicable statutory requirements, such as those included in appropriations restrictions applicable to HRSA funds; c. 45 CFR Part 75; d. National Policy Requirements and all other requirements described in the HHS Grants Policy Statement; e. Federal Award Performance Goals; and f. The Terms and Conditions cited in this Notice of Award. In the event there are conflicting or otherwise inconsistent policies applicable to the award, the above order of precedence shall prevail. Recipients indicate acceptance of the award, and terms and conditions by obtaining funds from the payment system.

39. ACCOUNTING CLASSIFICATION CODES

FY-CAN	CFDA	DOCUMENT NUMBER	AMT. FIN. ASST.	AMT. DIR. ASST.	SUB PROGRAM CODE	SUB ACCOUNT CODE
24 - 3898020	93.926	24H49MC27826	\$1,008,333.00	\$0.00	N/A	24H49MC27826

HRSA Electronic Handbooks (EHBs) Registration Requirements

The Project Director of the grant (listed on this NoA) and the Authorizing Official of the grantee organization are required to register (if not already registered) within HRSA's Electronic Handbooks (EHBs). Registration within HRSA EHBs is required only once for each user for each organization they represent. To complete the registration quickly and efficiently we recommend that you note the 10-digit grant number from box 4b of this NoA. After you have completed the initial registration steps (i.e., created an individual account and associated it with the correct grantee organization record), be sure to add this grant to your portfolio. This registration in HRSA EHBs is required for submission of noncompeting continuation applications. In addition, you can also use HRSA EHBs to perform other activities such as updating addresses, updating email addresses and submitting certain deliverables electronically. Visit <https://grants3.hrsa.gov/2010/WebEPSEExternal/Interface/common/accesscontrol/login.aspx> to use the system. Additional help is available online and/or from the HRSA Call Center at 877-Go4-HRSA/877-464-4772.

Terms and Conditions

Failure to comply with the remarks, terms, conditions, or reporting requirements may result in a draw down restriction being placed on your Payment Management System account or denial of future funding.

Grant Specific Condition(s)

1. Due Date: Within 60 Days of Budget Start Date

Within 60 days of receiving this Notice of Award, recipient shall submit a revised SF-424A budget form and budget justification totaling the federal award amount. Please note, details of the required changes will be transmitted via email upon release of this Notice of Award.

Responses to the conditions must be submitted via EHB within 60 days of receiving the award.

Grant Specific Term(s)

- This award is governed by the post-award requirements cited in Subpart D-Post Federal Award Requirements, standards for program and fiscal management of 45 CFR Part 75 except when the Notice of Award indicates in the "Remarks" section that the grant is included under "Expanded Authority". These recipients may take the following actions without prior approval of the Grant Management Office:
Section 75.308 c(2)(d)(1) Incur pre-award costs up to 90 calendar days before the award. See also 75.458.
Section 75.308 c(2)(d)(2) Initiate a one-time extension of the period of performance by up to 12 months unless one or more of the conditions outlined in paragraphs (d)(2)(i) through (iii) of this section apply. For one-time extensions, the recipient must notify the HHS awarding agency in writing with the supporting reasons and revised period of performance at least 10 calendar days before the end of the period of performance specified in the Federal award. This notification must be submitted through the Electronic Handbooks (EHB). This one-time extension may not be exercised merely for the purpose of using unobligated balances.
Section 75.308 c(2)(d)(3) Carry forward unobligated balances to subsequent periods of performance.
Except for funds restricted on a Notice of Award, grantee organizations are authorized to carry over unobligated grant funds up to the lesser of 25% or \$250,000 of the amount awarded for that budget period remaining at the end of that budget period. If the unobligated balance is in excess of 25% of the total amount awarded, or \$250,000, whichever is less, and the grantee wishes to carry the funds forward, the grantee must obtain prior approval from the Grants Management Office.
The grantee must notify the Grants Management Office when it has elected to carry over unobligated balances under Expanded Authority and the amount to be carried over. The notification must be provided under item 12, "Remarks", on the initial submission of the Federal Financial Report (FFR).
For all other Post Award request refer Standard Term 5 below.
- This action reflects a new document number. Please refer to this number when contacting the Payment Management System or submitting drawdown requests.
- 45 CFR Part 75 applies to all federal funds associated with the award. Part 75 has been effective since December 26, 2014. All references to prior OMB Circulars for the administrative and audit requirements and the cost principles that govern Federal monies associated with this award are superseded by the Uniform Guidance 2 CFR Part 200 as codified by HHS at 45 CFR Part 75.
- All post-award requests, such as significant budget revisions or a change in scope, must be submitted as a Prior Approval action via the Electronic Handbooks (EHBs) and approved by HRSA prior to implementation. Grantees under "Expanded Authority," as noted in the Remarks section of the Notice of Award, have different prior approval requirements. See "Prior-Approval Requirements" in the DHHS Grants Policy Statement: <https://www.hhs.gov/sites/default/files/grants/grants/policies-regulations/hhsgps107.pdf>.
- The funds for this award are in a sub-account in the Payment Management System (PMS). This type of account allows recipients to specifically identify the individual grant for which they are drawing funds and will assist HRSA in monitoring the award. Access to the PMS account number is provided to individuals at the organization who have permissions established within PMS. The PMS sub-account code can be found on the HRSA specific section of the NoA (Accounting Classification Codes). Both the PMS account number and sub-account code are needed when requesting grant funds. **Please note that for new and competing continuation awards issued after 10/1/2020, the sub-account code will be the document number.**

You may use your existing PMS username and password to check your organizations' account access. If you do not have access, complete a PMS Access Form (PMS/FFR Form) found at: <https://pmsapp.psc.gov/pms/app/userrequest>. If you have any questions about accessing PMS, contact the PMS Liaison Accountant as identified at:

<http://pms.psc.gov/find-pms-liaison-accountant.html>

6. This Notice of Award provides funding that aligns with the eleven-month budget period of 5/1/2024 – 3/31/2025

Program Specific Term(s)

1. The management Team, including key personnel, must reflect the cultural diversity of the Community to be served.
2. Each project is expected to establish a plan to recover, to the maximum extent feasible, third party revenues to which it is entitled for services provided; garner all other available Federal, state, local, and private funds; and charge beneficiaries according to their ability to pay for services without creating a barrier to those services. Where third-party payors, including Government agencies, are authorized or are under legal obligation to pay all or a portion of charges for health care services, "all such sources must be billed for covered services, and every effort must be made to obtain payment. Each service provider receiving Federal funds, either directly or indirectly, must have a procedure to identify all persons served who are eligible for third-party reimbursement."
3. All MCHB discretionary grant projects are expected to incorporate a carefully designed and well-planned evaluation protocol capable of demonstrating and documenting measurable progress toward achieving the stated goals. The measurement of progress toward goals should focus on systems, health and performance indicators, rather than solely on the intermediate process measures.
4. In accordance with the requirements of the "Government Performance and Results Act (GPRA) of 1993" (Public Law 103-62), MCHB has established measurable goals for Federal programs that can be reported as part of the budgetary process, thus linking funding decisions with performance. Performance measures and data elements for all MCHB-funded grant programs including Healthy Start have been finalized. As previously communicated all Healthy Start projects are expected to participate in the MCHB reporting requirements system.
5. Grantees must use the Healthy Start Data Collection Tools (i.e., the Demographic, Background, Prenatal, and Parent/Child forms) to collect standardized client-level data elements and must report the collected data on a quarterly basis to the Division Healthy Start and Perinatal Services (DHSPS) by uploading it to the Healthy Start Monitoring and Evaluation Data System (HSMED). Grantees must screen all Group-Based Health Education and Case Management/Care Coordination participants using the data collection tools and screening procedure/implementation guidance/form administration process provided by DHSPS.
6. Grantees must respond to requests for information from DHSPS and the Technical Assistance and Support Center (TASC). Grantees are required to participate in the National Healthy Start Evaluation activities, which may include, but is not limited to, grantee convenings, data collection, staff interviews, and program case studies.
7. HRSA reserves the right to reduce base awards for grantees that consistently maintain unobligated balance greater than \$100,000.
8. A grantee can propose to include an evidence-based home visiting model as part of their Healthy Start (HS) program if each component of the program addresses all Health Start (HS) program requirements, and the evidence-based model allows for the HS program to collect the data included in the HS screening tools. That is, the requirements of any curriculum or model chosen do not supersede the requirements of HS.
9. HRSA reserves the right to reduce funding if, after receiving technical assistance, grantee cannot fulfil the requirements of the grant. i.e. progress on benchmarks, number of participants served.
10. Grantees are to budget for up to 3 persons to attend all mandatory regional meetings and the Healthy Start convention.
11. A change in service area must be approved by HRSA and require a prior approval submission in HRSA's Electronic Handbook (EHB).
12. Grantees must allow for the provision of clinical services to Healthy Start participants and will be expected to dedicate 12 percent of their award to support nurse practitioners, certified nurse midwives, physician assistants, behavioral health specialists, and other maternal-child advanced practice health professionals dedicated to HS projects. As part of the 12 percent, funds may also be used to support health educators by having clinical staff conduct trainings on associated topics, such as Urgent Maternal Warning Signs.

Standard Term(s)

1. Your organization is required to have the necessary policies, procedures, and financial controls in place to ensure that your organization complies with all legal requirements and restrictions applicable to the receipt of federal funding, per HRSA [Standard Terms](#) (unless otherwise specified on your Notice of Award), and [Legislative Mandates](#). The effectiveness of these policies, procedures, and controls is subject to audit.

Reporting Requirement(s)

1. **Due Date: Within 90 Days of Award Issue Date**

The grantee must submit a Performance Report within 90 days after receipt of the NoA. This report should include completing the financial forms, project abstract, grant summary and performance measures. The performance report must be submitted using the Electronic Handbook (EHB).

2. **Due Date: Annually (Budget Period) Beginning: Budget Start Date Ending: Budget End Date, due 90 days after end of reporting period.**

The recipient must submit, within 90 days after budget period end date, an annual Federal Financial Report (FFR). The report should reflect cumulative reporting within the project period of the document number. **All FFRs must be submitted through the Payment Management System (PMS).** Technical questions regarding the FFR, including system access should be directed to the PMS Help Desk by submitting a ticket through the self-service web portal ([PMS Self-Service Web Portal](#)), or calling 877-614-5533.

Failure to comply with these reporting requirements will result in deferral or additional restrictions of future funding decisions.

Contacts

NoA Email Address(es):

Name	Role	Email
Rebecca Reynolds Porter	Authorizing Official	becky.reynolds@liftca.org
Ashley N Staggs	Business Official	ashley.staggs@liftca.org
Pam Waugh	Point of Contact	pam.waugh@liftca.org
Pam Waugh	Program Director	pam.waugh@liftca.org

Note: NoA emailed to these address(es)

All submissions in response to conditions and reporting requirements (with the exception of the FFR) must be submitted via EHBs. Submissions for Federal Financial Reports (FFR) must be completed in the Payment Management System (<https://pms.psc.gov/>).

Technical & Management Assistance Services Contract Award Option Year 1 – Region 2

LIFT Community Action Agency, Inc. is requesting the Board's approval to accept a Self-Help Technical and Management Assistance Services Contract Award for Option Year 1 funding for Region 2. The contract for services has been awarded by the U.S. Department of Agriculture, Rural Development based on the contract bid request. As T&MA Contractor for Region 2 – South Central, LIFT CAA would continue to provide training and technical assistance to organizations, including Indian Tribes, eligible to receive assistance under the Section 523 Mutual Self-Help Technical Assistance Grant Program. The states to be serviced under Region 2 include Arkansas, Kansas, Louisiana, Missouri, Nebraska, North Dakota, New Mexico, Oklahoma, South Dakota, Texas, and Wyoming. The period of performance under the contract will be as follows:

Base Year	September 01, 2023 through March 31, 2024
Option Year One	April 01, 2024 through March 31, 2025
Option Year Two	April 01, 2025 through March 31, 2026
Option Year Three	April 01, 2026 through March 31, 2027
Option Year Four	April 01, 2027 through March 31, 2028

As a Contractor, LIFT CAA furnishes all labor, management, supervision, quality control, facilities, equipment, materials, and services needed to perform the requirements of the contract. Key Personnel assigned to the contract includes the following:

- Executive Director
- Financial Coordinator
- Program Manager
- Management/Program Analyst
- Housing/Self-Help Specialists.

LIFT CAA has provided services for USDA Rural Development under a Technical and Management Assistance Contract since 1980. The agency's T&MA Program has helped in the development of more than 100 Self-Help Programs throughout the 11 states comprising Region 2. As a result of these efforts, well over 6,000 homes have been constructed for very low- and low-income individuals and families.

NeighborWorks® America
INVESTMENT AND GRANT FUNDS LETTER
May 06, 2024

Neighborhood Reinvestment Corporation, doing business as NeighborWorks® America (“NeighborWorks® America”) hereby authorizes the award of the following grant funds payable to the NeighborWorks organization named below (“the NeighborWorks Organization”), pursuant to the terms and conditions stated in the *Investment and Grant Agreement*. These grant funds are federal funds.

LIFT COMMUNITY ACTION AGENCY, INC.

Unrestricted Grant Funds provided by this Investment and Grant Letter	\$ 1,000.00
Restricted Until First Use grant funds provided by this Investment and Grant Letter	\$ 0.00
Restricted Until Donor Release grant funds provided by this Investment and Grant Letter	\$ 0.00
TOTAL	\$ 1,000.00

The following terms and conditions shall govern the disbursement and expenditure of these Grant Funds:

Definitions.

- a. **“Restricted Until Donor Release”** refers to grant funds held in perpetuity, used in accordance with the eligible purposes outlined at Section III to build assets for the NeighborWorks Organization and the community in which the NeighborWorks Organization operates. These funds are not to be used for non-capitalizable purposes such as paying day-to-day expenses of the NeighborWorks Organization. Under FASB ASU 2016-14, these funds are considered net assets with donor restrictions, invested in perpetuity. Previously, the NeighborWorks America Investment and Grant Agreement referred to these funds as “Permanently Restricted Capital Funds.”
- b. **“Restricted Until First Use”** refers to grant funds that are restricted until used in accordance with an eligible purpose outlined at Section III. These funds are not to be used for non-capitalizable purposes such as paying the day-to-day expenses of the NeighborWorks Organization. Under FASB ASU 2016-14, these funds are considered net assets with donor restrictions, subject to expenditure for a specified purpose (capitalizable real estate or lending activities).
- c. **“Unrestricted Grant Funds”** are unrestricted in nature and used to further the NeighborWorks Organization mission, including non-capitalizable expenses. Under FASB ASU 2016-14, these funds are considered net assets without donor restriction. Previously, the NeighborWorks America Investment and Grant Agreement referred to these funds as “Expendable Grant Funds.”

Federal Award Identification.

- a. NeighborWorks Organization name: LIFT Community Action Agency, Inc.
- b. NeighborWorks Organization PCode: 8251
- c. Resource Opportunity: NeighborWorks Week Request FY24
- d. Application number(s): R-NWW-2024-74342
- e. Award date: May 06, 2024
- f. Amount of federal funds obligated by this *Investment and Grant Funds Letter*: \$1,000.00

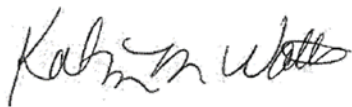
- g. Federal award project description: *This grant is an award to carry out community development programming in accordance with the enabling legislation of the Neighborhood Reinvestment Corporation, P.L 95-557.*
- h. Funding source: *Federal Appropriation*
- i. Date of appropriation: *March 9, 2024*
- j. Federal Public Law Number (PL#) and Name: *Public Law # 118-42; Name - US Department of Treasury, NeighborWorks America*
- k. Is this award for R&D?: *This grant is not awarded for the purpose of Research and Development.*
- l. Award type: *Fixed amount award (direct and indirect cost rates are not applicable).*

The NeighborWorks Organization must – consistent with Section II(D) of the *Investment and Grant Agreement* – comply with OMB’s Uniform Guidance at 2 CFR 200, including with regards to disallowed costs. For guidance on financial accounting and reports, please refer to the *Investment and Grant Agreement* and the *Guidance for the Conduct of Audits*, posted on the Member Site.

Acceptance.

By accepting these grant funds (either through check endorsement, automated clearing house “ACH” deposit, or use of the funds in any manner), the NeighborWorks Organization agrees to comply with the terms and conditions stated in the *Investment and Grant Agreement* entered into by the NeighborWorks Organization and NeighborWorks America. This *Investment and Grant Funds Letter* presumes acceptance of the award subject to all terms and conditions stated here and in the *Investment and Grant Agreement*. Any conflicting terms, additional terms, or waivers of these terms proposed by the NeighborWorks Organization are rejected unless expressly agreed to in writing by NeighborWorks America.

Sincerely,



Kathryn Watts, Senior Vice President, Field Operations
Neighborhood Reinvestment Corporation, dba NeighborWorks® America

LIFT 403(b) Plan

*The Auditors' Communication with
Those Charged with Governance*

July 31, 2023



May 9, 2024

Board of Directors and Plan Administrator
LIFT 403(b) Plan

We have audited the financial statements of the LIFT 403 (b) Plan (the “Plan”) an employee benefit plan subject to the Employee Retirement Income Security Act of 1974 (ERISA), as permitted by ERISA Section 103(a)(3)(C) [ERISA Section 103(a)(3)(C) audit] as of and for the year ended July 31, 2023, and have issued our report thereon dated May 9, 2024. As permitted by ERISA Section 103(a)(3)(C), our audit did not extend to any statements or information related to assets held for investment of the Plan by Empower Annuity Insurance Company of America and Empower Trust Company, LLC (“Empower”), the custodians, which are banks or similar institutions or insurance carriers that are regulated, supervised, and subject to periodic examination by a state or federal agency, that prepared and certified the statements or information regarding assets so held in accordance with 29 CFR 2520.103-5. Our audit did not extend to the certified investment information, except for obtaining and reading the certification, comparing the certified investment information with the related information presented and disclosed in the financial statements and ERISA-required supplemental schedule, and reading the disclosures relating to the certified investment information to assess whether they are accordance with the presentation and disclosure requirements of accounting principles generally accepted in the United States. Accordingly, the objective of an ERISA Section 103(a)(3)(c) audit is not to express an opinion about whether the financial statements as a whole are presented fairly, in all material respects in accordance with accounting principles generally accepted in the United States. Professional standards require that we provide you with information about our responsibilities under auditing standards generally accepted in the United States, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our engagement letter to you dated May 11, 2023. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the Plan are described in Note 2 to the financial statements. No new accounting policies were adopted in 2023 and the application of other existing policies was not changed during 2023. We noted no transactions entered into by the Plan during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Board of Directors and Plan Administrator
LIFT 403(b) Plan
May 9, 2024
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Significant Audit Matters, Continued

Qualitative Aspects of Accounting Practices, Continued

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the financial statements were the fair values of the investments, which were provided and certified by the Plan's custodians.

The financial statement disclosures are neutral, consistent, and clear.

Form 5500 Procedures

We are required to obtain and read a substantially complete draft of Form 5500 prior to dating our auditors' report. The purpose of this procedure is to identify any material inconsistencies between the draft Form 5500 and the Plan's financial statements. We identified no material inconsistencies in performing and completing our audit.

Difficulties Encountered in Performing the Audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. We noted no uncorrected misstatements.

Disagreements with Management

For purposes of this letter, a disagreement with management is a disagreement on a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. We are pleased to report that no such disagreements arose during the course of our audit.

Board of Directors and Plan Administrator
LIFT 403(b) Plan
May 9, 2024
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Significant Audit Matters, Continued

Management Representations

We have requested certain representations from management that are included in the management representation letter dated May 9, 2024.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a “second opinion” on certain situations. If a consultation involves application of an accounting principle to the Plan’s financial statements or a determination of the type of auditors’ opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Matters or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Plan’s auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

Other Matters

Our responsibility for the ERISA-required supplemental schedule accompanying the financial statements is to perform adequate procedures to evaluate whether the form and content of the ERISA-required supplemental schedule, other than that agreed to or derived from the certified investment information, are presented in compliance with the Department of Labor’s Rules and Regulations for Reporting and Disclosure under ERISA, and whether the information in the supplemental schedule related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

Board of Directors and Plan Administrator
LIFT 403(b) Plan
May 9, 2024
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Other Required Communications

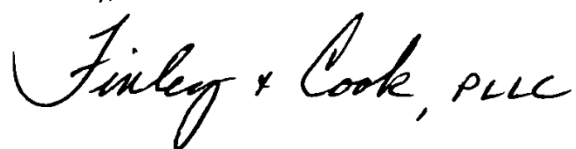
We as independent auditors are required to:

- a. Communicate significant deficiencies and material weaknesses in internal control to the audit committee or its equivalent.
- b. Report directly to the audit committee (or equivalent) any fraud that causes a material misstatement of the financial statements and any fraud involving senior management. Fraud perpetrated by lower-level employees is also to be reported if it resulted in an individually significant misstatement.
- c. Report illegal acts that come to our attention (except those that are clearly inconsequential).

We have nothing to report.

This information is intended solely for the use of the Board of Directors, the Plan Administrator, Plan Trustees, and management of the Plan and is not intended to be, and should not be, used by anyone other than these specified parties.

Sincerely,

A handwritten signature in black ink that reads "Finley & Cook, PLLC". The signature is written in a cursive, flowing style.

LIFT 403(b) PLAN

SUMMARY OF UNCORRECTED MISSTATEMENTS

Year Ended July 31, 2023

None.

LIFT 403(b) Plan

The Auditors' Management Recommendations Letter

July 31, 2023



Finley & Cook, PLLC
405-878-7300
Finley-Cook.com
1421 East 45th Street
Shawnee, OK 74804

May 9, 2024

Board of Directors and Plan Administrator
LIFT 403(b) Plan

Except as discussed in the following paragraph, in planning and performing our audit of the financial statements of the LIFT 403(b) Plan (the "Plan"), an employee benefit plan subject to the Employee Retirement Income Security Act of 1974 (ERISA), as of and for the year ended July 31, 2023, in accordance with auditing standards generally accepted in the United States, we considered Plan's internal control over financial reporting ("internal control") as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of issuing our report on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Plan's internal control. Accordingly, we do not express an opinion on the effectiveness of the Plan's internal control.

We were engaged to perform an ERISA Section 103(a)(3)(C) audit of those financial statements as permitted by 29 CFR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974. As permitted by ERISA Section 103(a)(3)(C), our audit did not extend to any statements or information related to assets held for investment of the Plan ("investment information") by Empower Annuity Insurance Company of America and Empower Trust Company, LLC ("Empower") that prepared and certified the statements or information regarding assets so held in accordance with 29 CFR 2520.103-5. Our audit also did not include a consideration of internal control relating to the investment information.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or a combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the Plan's financial statements will not be prevented, or detected and corrected, on a timely basis.

Our consideration of internal control was for the limited purpose described in the first two paragraphs and was not designed to identify all deficiencies in internal control that might be material weaknesses. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

This communication is intended solely for the information and use of management and the trustees of the Plan and is not intended to be, and should not be, used by anyone other than these specified parties.

Sincerely,

A handwritten signature in black ink that reads "Finley & Cook, PLLC".

LIFT 403(b) Plan

Financial Statements

July 31, 2023 and 2022
(With Independent Auditors' Report Thereon)

LIFT 403(b) PLAN

FINANCIAL STATEMENTS

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Note: All other schedules required by the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974 have been omitted because they are not applicable.



Finley & Cook, PLLC

405-878-7300

Finley-Cook.com

1421 East 45th Street
Shawnee, OK 74804

INDEPENDENT AUDITORS' REPORT

Plan Administrator
LIFT 403(b) Plan

Scope and Nature of the ERISA Section 103(a)(3)(C) Audit

We have performed audits of the accompanying financial statements of the LIFT Community Action Agency, Inc. 403(b) Plan (the "Plan"), an employee benefit plan subject to the Employee Retirement Income Security Act of 1974 (ERISA), as permitted by ERISA Section 103(a)(3)(C) [ERISA Section 103(a)(3)(C) audit]. The financial statements comprise the statements of net assets available for plan benefits as of July 31, 2023 and 2022 and the related statement of changes in net assets available for plan benefits for the year ended July 31, 2023, and the related notes to the financial statements.

Management, having determined it is permissible in the circumstances, has elected to have the audits of the Plan's financial statements performed in accordance with ERISA Section 103(a)(3)(C) pursuant to 29 CFR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA. As permitted by ERISA Section 103(a)(3)(C), our audits need not extend to any statements or information related to assets held for investment of the Plan ("investment information") by a bank or similar institution or insurance carrier that is regulated, supervised, and subject to periodic examination by a state or federal agency, provided that the statements or information regarding assets so held are prepared and certified to by the bank or similar institution or insurance carrier in accordance with 29 CFR 2520.103-5 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA ("qualified institution").

Management has obtained certifications from Empower Annuity Insurance Company of America and Empower Trust Company, LLC ("Empower"), a qualified institution, as of July 31, 2023 and 2022, and for the year ended July 31, 2023, stating that the certified investment information, as described in Note 7 to the financial statements, is complete and accurate.

(Continued)

INDEPENDENT AUDITORS' REPORT, CONTINUED

Opinion

In our opinion, based on our audits and on the procedures performed as described in the Auditors' Responsibilities for the Audit of the Financial Statements section—

- the amounts and disclosures in the financial statements referred to above, other than those agreed to or derived from the certified investment information, are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States.
- the information in the financial statements referred to above related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Plan and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our ERISA Section 103(a)(3)(C) audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error. Management's election of the ERISA Section 103(a)(3)(C) audit does not affect management's responsibility for the financial statements.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Plan's ability to continue as a going concern for one year after the date the financial statements are available to be issued.

Management is also responsible for maintaining a current plan instrument, including all plan amendments; administering the Plan; and determining that the Plan's transactions that are presented and disclosed in the financial statements are in conformity with the Plan's provisions, including maintaining sufficient records with respect to each of the participants, to determine the benefits due or which may become due to such participants.

(Continued)

INDEPENDENT AUDITORS' REPORT, CONTINUED

Auditors' Responsibilities for the Audit of the Financial Statements

Except as described in the Scope and Nature of the ERISA Section 103(a)(3)(C) Audit section of our report, our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Plan's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Plan's ability to continue as a going concern for a reasonable period of time.

Our audits did not extend to the certified investment information, except for obtaining and reading the certification, comparing the certified investment information with the related information presented and disclosed in the financial statements, and reading the disclosures relating to the certified investment information to assess whether they are in accordance with the presentation and disclosure requirements of accounting principles generally accepted in the United States.

Accordingly, the objective of an ERISA Section 103(a)(3)(C) audit is not to express an opinion about whether the financial statements as a whole are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

(Continued)

INDEPENDENT AUDITORS' REPORT, CONTINUED

Supplemental Schedule Required by ERISA

The supplemental Schedule H, Line 4i—Schedule of Assets (Held at End of Year) as of July 31, 2023, is presented for purposes of additional analysis and is not a required part of the financial statements but is supplementary information required by the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information included in the supplemental schedule, other than that agreed to or derived from the certified investment information, has been subjected to auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with generally accepted auditing standards. For information included in the supplemental schedule that agreed to or is derived from the certified investment information, we compared such information to the related certified investment information.

In forming our opinion on the supplemental schedule, we evaluated whether the supplemental schedule, other than the information agreed to or derived from the certified investment information, including its form and content, is presented in conformity with the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA.

In our opinion—

- the form and content of the supplemental schedule, other than the information in the supplemental schedule that agreed to or is derived from the certified investment information, are presented, in all material respects, in conformity with the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA.
- the information in the supplemental schedule related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

A handwritten signature in black ink that reads "Finley & Cook, PLLC". The signature is written in a cursive, flowing style.

Shawnee, Oklahoma
May 9, 2024

LIFT 403(b) PLAN

STATEMENTS OF NET ASSETS AVAILABLE FOR PLAN BENEFITS

<i>July 31,</i>	<i>2023</i>	<i>2022</i>
Assets		
Noninterest-bearing cash	\$ 30,817	31,090
Investments, at fair value:		
Mutual funds	7,951,003	7,509,033
Total investments, at fair value	7,951,003	7,509,033
Investments, at contract value:		
Guaranteed investment contract	3,397,105	4,093,687
Total investments, at contract value	3,397,105	4,093,687
Receivables:		
Employer contributions	23,687	2,771
Participant contributions	15,045	2,613
Notes receivable from participants	377,878	407,518
Total receivables	416,610	412,902
Total assets	11,795,535	12,046,712
Liabilities		
Corrective distributions payable	5,284	-
Net assets available for plan benefits	\$ 11,790,251	12,046,712

See Independent Auditors' Report.
See accompanying notes to financial statements.

LIFT 403(b) PLAN

STATEMENT OF CHANGES IN NET ASSETS AVAILABLE FOR PLAN BENEFITS

Year Ended July 31, 2023

Additions to net assets attributed to:

Investment income:

Dividends and interest	246,439
Net appreciation in fair value of mutual funds	310,676
Total investment income	557,115

Contributions:

Employer's	592,527
Participants'	364,113
Total contributions	956,640

Interest income on notes receivable from participants	21,254
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Total additions	1,535,009
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Deductions in net assets attributed to:

Distributions to participants	1,733,115
Corrective distributions	5,284
Fees	53,071
Total deductions	1,791,470

Net decrease in net assets available for plan benefits	(256,461)
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Net assets available for plan benefits:

Beginning of year	12,046,712
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End of year	\$ 11,790,251
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See Independent Auditors' Report.
See accompanying notes to financial statements.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS

July 31, 2023 and 2022

(1) PLAN DESCRIPTION

The following description of the LIFT 403(b) Plan (the "Plan") provides only general information. Participants should refer to the plan agreement for a more complete description of the Plan's provisions. Empower Annuity Insurance Company of America and Empower Trust Company, LLC ("Empower") were the custodians of the Plan.

General

The Plan is a prototype plan that operates as a Section 403(b) retirement plan. The Plan is designed to comply with Section 403(b) and the regulations thereunder of the Internal Revenue Code of 1986, as amended (the "Code") and is subject to the applicable provisions of the Employee Retirement Income Security Act of 1974 (ERISA). The Plan was amended and restated effective January 1, 2009. The Plan's original effective date was August 1, 1995. The Plan covers all eligible employees of LIFT Community Action Agency, Inc. (the "Company"). Employees are eligible to make elective deferrals to the Plan beginning on their date of hire. Employees are eligible to participate in employer contributions once they have completed 6 months of service. Effective August 1, 2018, the Plan was amended to allow for the auto enrollment of new employees at an initial deferral rate of 3% unless otherwise specified by the employee.

Contributions/Investment Options

Participants can contribute amounts to the Plan not to exceed the lesser of 100% of the participant's eligible compensation, as defined, or the maximum amount established by federal law. Participants age 50 and older may contribute up to an additional \$7,500 of catch-up contributions. The Company contributes 200% of the first 5% of participant contributions. Effective August 1, 2018, the Plan was amended so that matching of participant catch-up contributions was no longer allowed. Participants may direct their contributions and employer contributions to their account among various investment options offered through the Plan's custodians. Participants may change their investment options at any time.

Participant Accounts

Each participant's account is credited with the participant's contributions, the Company's contribution, and the allocation of Plan earnings. Participant accounts are charged with an allocation of administrative expenses that are paid by the Plan. Allocations are based on participant earnings, account balances, or specific participant transactions, as defined. The benefit to which a participant is entitled is the benefit that can be provided from the participant's vested account.

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(1) PLAN DESCRIPTION, CONTINUED

Vesting

Participants are 100% vested in contributions they make, and they become vested in contributions made by the Company according to the table below:

Vesting Schedule	
Matching Contributions	
<u>Years of Service</u>	<u>Percentage</u>
Less than 1	0%
1	25%
2	50%
3	75%
4 or more	100%

Notes Receivable From Participants

Participants may borrow the lesser of \$50,000 or up to 50% of their vested account balance. The minimum loan is \$1,000. Loans are secured by the balance in the participant's account. Loans shall provide for level amortization with payments to be made over a period not to exceed 5 years except for loans to purchase a principal residence, which can exceed 5 years. A reasonable rate of interest is charged to each participant. A participant may have only two loans outstanding at a time. Upon termination, retirement, or death, the participant or beneficiary has the option to pay off the outstanding loan balance. If the participant elects to not pay off the loan, the outstanding loan balance is converted to an early withdrawal. At July 31, 2023 and 2022, participant notes receivable outstanding were \$377,878 and \$407,518, respectively, with interest rates varying from 3.25% to 10.25%, and 3.25% to 6.75%, respectively.

Withdrawals/Benefits

Prior to a participant's separation from service, the participant's account balance shall be available for distribution in the event of hardship, attaining age 59½, or attaining normal retirement age. Upon termination of employment, death or disability, participants may elect to receive their account balances in the form of a lump sum, installment payments, or annuity payments.

A terminating member of the Plan is paid the current value of their contributions to the Plan, but will forfeit all Company contributions to the extent they are nonvested. As of July 31, 2023 and 2022, there were no unpaid vested benefits to participants who had requested a withdrawal from the Plan.

Hardship distributions may be made to participants under certain conditions.

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(1) **PLAN DESCRIPTION, CONTINUED**

Forfeitures

During the years ended July 31, 2023 and 2022, nonvested amounts forfeited totaled approximately \$29,000 for both years. These amounts are used to pay plan expenses, reduce Company matching contributions, or are reallocated to participant's accounts as additional employer matching contributions. In 2023 and 2022, the Company reallocated approximately \$64,000 and \$31,000, respectively, from these forfeited nonvested amounts to participant's accounts. The balance of forfeited nonvested amounts as of July 31, 2023 and 2022, was approximately \$30,800 and \$31,100, respectively.

Plan Termination

Although the Company has not expressed any intent to do so, the Company has the right under the Plan to discontinue its contributions at any time and to terminate the Plan subject to the provisions of ERISA. In the event of full or partial plan termination, participants will become 100% vested in their accounts.

Administration of Plan Assets

The Plan is administered by the Company, and an officer of the Company is the trustee. The custodians invest the contributions received, as well as interest and dividend income, and make distributions to participants.

Administrative Costs

The Company absorbs certain administrative costs of the Plan, which are paid directly by the Company and are excluded from these financial statements.

Basis of Accounting

The financial statements of the Plan are prepared under the accrual basis of accounting in accordance with accounting principles generally accepted in the United States.

Use of Estimates in the Preparation of Financial Statements

The preparation of financial statements in conformity with accounting principles generally accepted in the United States requires the plan administrator to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results may differ from those estimates.

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(2) **SIGNIFICANT ACCOUNTING POLICIES**

Investment Valuation and Income Recognition

The Plan's investments are stated at fair value using quoted market prices, if available, except for the fully benefit-responsive investment contract, which is reported at contract value. Purchases and sales of investments are recorded on a trade-date basis. Dividends are recorded on the ex-dividend date. Interest income is recorded on the accrual basis. Net appreciation (depreciation) includes the Plan's gains and losses on investments bought and sold, as well as held, during the year.

Management fees and operating expenses charged to the Plan for investments are deducted from income earned on a daily basis and are not separately reflected. Consequently, management fees and operating expenses are reflected as a reduction of investment return for such investments.

Notes Receivable from Participants

Notes receivable from participants are reported at their unpaid principal balance plus any accrued but unpaid interest. Accrued and unpaid interest at July 31, 2023 and 2022, was a nominal amount.

Payment of Benefits

Benefits are recorded when paid.

Risks and Uncertainties

Plan participants may invest in various types of investment securities. Investment securities are exposed to various risks, such as interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported in the statements of net assets available for plan benefits.

Date of Management's Review of Subsequent Events

Management has evaluated subsequent events through May 9, 2024, the date which the financial statements were available to be issued.

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(3) INVESTMENTS

During 2023, the Plan's investments, including gains and losses on investments bought and sold, as well as held, during the year depreciated in value as follows:

Mutual funds	<u>\$ 7,951,003</u>
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(4) FAIR VALUE MEASUREMENTS

Fair value is defined as the exchange price that would be received for an asset or paid to transfer a liability (an exit price) in the principal or most advantageous market for the asset or liability in an orderly transaction between market participants on the measurement date. In estimating fair value, the Plan utilizes valuation techniques that are consistent with the market approach, the income approach, and/or the cost approach. Such valuation techniques are consistently applied. Inputs to valuation techniques include the assumptions that market participants would use in pricing an asset or liability. Fair values may not represent actual values of assets and liabilities that could have been realized on the measurement date or that will be realized in the future. The use of different market assumptions and/or estimation methodologies may have a material effect on the estimated fair value amounts.

Accounting Standards Codification Topic 820, "Fair Value Measurement," establishes a fair value hierarchy for valuation inputs that gives the highest priority to quoted prices in active markets for identical assets or liabilities and the lowest priority to unobservable inputs. The fair value hierarchy is as follows:

- Level 1 inputs to the valuation methodology are quoted prices (unadjusted) for identical assets or liabilities in active markets.
- Level 2 inputs to the valuation methodology include quoted prices for similar assets and liabilities in active markets, and inputs that are observable for the asset and liability, either directly or indirectly, for substantially the full term of the asset or liability.
- Level 3 inputs consist of unobservable inputs which are used when observable inputs are unavailable and reflect an entity's own assumptions about the assumptions that market participants would use in pricing the assets or liabilities.

The Plan uses appropriate valuation methods based on the available inputs to measure the fair values of its assets and liabilities.

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(4) FAIR VALUE MEASUREMENTS, CONTINUED

The following is a description of the valuation methodologies used for assets measured at fair value on a recurring basis and recognized in the accompanying statements of net assets available for plan benefits, as well as the general classification of such assets pursuant to the valuation hierarchy.

Mutual Funds

The fair values of mutual funds are determined by obtaining quoted prices on nationally recognized security exchanges.

The fair values of financial instruments measured on a recurring basis at July 31 were as follows:

		Fair Value Measurements at Reporting Date Using		
		Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
	Measured at Fair Value			
<u>2023</u>				
Financial assets:				
Mutual funds	\$ 7,951,003	7,951,003	-	-
<u>2022</u>				
Financial assets:				
Mutual funds	\$ 7,509,033	7,509,033	-	-

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(5) GUARANTEED INTEREST ACCOUNTS

As of July 31, 2023 and 2022, the Plan held a fully benefit-responsive group annuity contract with Empower Annuity Insurance Company of America. The EI Fixed Account—Series Class V fund is a group annuity contract and is a general account product of Empower Annuity Insurance Company of America. The methodology for calculating the interest crediting rate is based on the earnings of the underlying assets in the entire medium-long term new portfolio compared to the minimum interest crediting rate, as stated in the contract, and prevailing market conditions. The interest crediting rate is reset quarterly. Contract value is the relevant measurement attribute for this fund.

Certain events limit the ability of the Plan to transact at contract value with Empower Annuity Insurance Company of America. Such events include premature termination of the contracts by the Plan, layoffs, plan termination, bankruptcy, mergers and early retirement incentives. The Plan does not believe that any events which would limit the Plan's ability to transact at contract value with participants are probable. There are no reserves against contract value for credit risk of Empower Annuity Insurance Company of America, or otherwise.

The average yield earned by the Plan for 2023 and 2022 of 1.98% and 1.85%, respectively, is derived by averaging the quarterly gross interest rates for the fund over the year.

(6) TAX STATUS

The Plan is a prototype plan offered through Empower, a custodian of the Plan. Presently, the Internal Revenue Service (IRS) does not provide determination letters on prototype 403(b) plans. The plan administrator has adopted a written 403(b) plan that is intended to satisfy the regulatory requirements of the IRS and believes that the Plan has been operated in accordance with the written plan. The Plan qualified under the Code and thus the Plan is exempt from federal income taxes. Accordingly, no provision for income taxes has been included in the Plan's financial statements.

Accounting principles generally accepted in the United States require plan management to evaluate tax positions taken by the Plan and recognize a tax liability (or asset) if the Plan has taken an uncertain position that more likely than not would not be sustained upon examination by the taxing authorities. The plan administrator has analyzed the tax positions taken by the Plan and has concluded that as of July 31, 2023, there were no uncertain positions taken or expected to be taken that would require recognition of a liability (or asset) or disclosure in the financial statements. The Plan is subject to routine audits by taxing jurisdictions; however, there are currently no audits in progress for any tax periods. The plan administrator believes the Plan is no longer subject to income tax examinations for periods prior to 2020.

See Independent Auditors' Report.

LIFT 403(b) PLAN

NOTES TO FINANCIAL STATEMENTS, CONTINUED

(7) INFORMATION CERTIFIED BY PLAN CUSTODIANS

The plan administrator has elected the method of annual reporting compliance permitted by 29 CFR 2520.103-8 of the Department of Labor's (DOL) Rules and Regulations for Reporting and Disclosure under ERISA. Accordingly, Empower have certified that the following data included in the accompanying financial statements and supplemental schedule is complete and accurate.

- Investments and notes receivable from participants as shown in the statements of net assets available for plan benefits as of July 31, 2023 and 2022.
- Investment activity (net depreciation in fair value of mutual funds, and dividends) as shown in the statement of changes in net assets available for plan benefits for the year ended July 31, 2023.
- Schedule H, line 4i—schedule of assets (held at end of year) as of July 31, 2023, as shown on the supplemental schedule.

The Plan's independent auditors did not perform auditing procedures with respect to this information, except for comparing such information to the related information included in the financial statements and supplemental schedule.

(8) PARTY-IN-INTEREST TRANSACTIONS

Parties-in-interest are defined under DOL regulations as any fiduciary of the Plan, any party rendering services to the Plan, the employer, and certain others. As such, transactions conducted by the custodians qualify as party-in-interest transactions.

As discussed in Note 5, the guaranteed interest account was managed by Empower, and therefore, is considered a party in interest transaction. During 2023 and 2022, the Plan paid Empower approximately \$17,000 and \$21,000, respectively, for contract administration of the Plan.

See Independent Auditors' Report.

LIFT 403(b) PLAN

**Form 5500, Schedule H, Line 4i—
Schedule of Assets (Held at End of Year)**

July 31, 2023

(a)	(b) Identity of issue, borrower, lessor, or similar party	(c) Description of investment including maturity date, rate of interest, collateral, par, or maturity value	(d) Cost	(e) Current value
Guaranteed investment contract				
*	El Fixed Account - Series Class V	Guaranteed interest account	N/A	\$ 3,397,105
Subtotal of guaranteed investment contract			N/A	3,397,105
Mutual funds				
	AB Large Cap Growth Z	Mutual Fund	N/A	792,373
	American Funds New World R6	Mutual Fund	N/A	38,708
	Columbia Dividend Income Instl 3	Mutual Fund	N/A	664,663
	Fidelity Advisor Total Bond I	Mutual Fund	N/A	1,323,473
	Fidelity Freedom Index 2020 Instl Prem	Mutual Fund	N/A	78,289
	Fidelity Freedom Index 2025 Instl Prem	Mutual Fund	N/A	470,895
	Fidelity Freedom Index 2030 Instl Prem	Mutual Fund	N/A	77,552
	Fidelity Freedom Index 2035 Instl Prem	Mutual Fund	N/A	53,236
	Fidelity Freedom Index 2040 Instl Prem	Mutual Fund	N/A	26,932
	Fidelity Freedom Index 2045 Instl Prem	Mutual Fund	N/A	144,021
	Fidelity Freedom Index 2050 Instl Prem	Mutual Fund	N/A	24,707
	Fidelity Freedom Index 2055 Instl Prem	Mutual Fund	N/A	28,400
	Fidelity Freedom Index 2060 Instl Prem	Mutual Fund	N/A	27,555
	Fidelity Freedom Index 2065 Instl Prem	Mutual Fund	N/A	19,253
	Fidelity Freedom Index Income Instl Prem	Mutual Fund	N/A	66,000
	Hartford Intel Opportunities Y	Mutual Fund	N/A	489,083
	Vanguard 500 Index Admiral	Mutual Fund	N/A	1,734,305
	Vanguard Developed Markets Index ADM	Mutual Fund	N/A	150,357
	Vanguard Interim-Term Bond Index ADM	Mutual Fund	N/A	559,686
	Vanguard Mid Cap Index Fund—Admiral	Mutual Fund	N/A	385,778
	Vanguard Real Estate Index—Admiral	Mutual Fund	N/A	124,378
	Vanguard Small Cap Index ADM	Mutual Fund	N/A	671,359
Subtotal of mutual funds			N/A	7,951,003

(Continued)

See Independent Auditors' Report.

Employer ID #73-0772321
Plan #002

LIFT 403(b) PLAN

Form 5500, Schedule H, Line 4i—
Schedule of Assets (Held at End of Year), Continued

July 31, 2023

(a)	(b) Identity of issue, borrower, lessor, or similar party	(c) Description of investment including maturity date, rate of interest, collateral, par, or maturity value	(d) Cost	(e) Current value
Participant loans				
*	Notes receivable from participants	Notes receivable from participants with interest rates from 3.25%–10.25%, maturity dates from August 2023 to May 2028, secured by participants' vested account balances.	-	377,878
Subtotal of participant loans			-	377,878

TOTAL \$ - 11,725,986

N/A—Not applicable, participant-directed accounts

*—Party-in-interest

See Independent Auditors' Report.

2022 Plan Information Worksheet

Status:

Page 27 of 56

Plan Sponsor Information

Plan Sponsor's Name
LIFT Community Action Agency, Inc.

Plan Sponsor's Mailing Address
209 North 4th

Foreign ☐

Plan Sponsor's Doing Business As Name

Plan Sponsor's Mailing City, Province, State and ZIP
Hugo OK 74743

Plan Sponsor's Location Address

Foreign ☐

Plan Sponsor's Care Of Name

Plan Sponsor's EIN
73-0772321

Plan Sponsor's Phone Number
(580) 326-3351

Plan Sponsor's Location City, Province, State and ZIP

Plan Administrator Information

☒ Same as Plan Sponsor

Plan Administrator's Name

Plan Administrator's Address

Foreign ☐

Plan Administrator's Care Of Name

Plan Administrator's City, Province, State and ZIP

Plan Administrator's EIN

Plan Administrator's Phone Number

Plan Information

Plan Name
LIFT 403b Plan

Business Code
621498

Filing for Plan Year:
2022

DFE Plan ☐

Plan Year
Begins

MM/DD/YYYY
08/01/2022

MM/DD/YYYY
Ends 07/31/2023

Three-digit Plan Number
002

Plan ID

Tax Year
Begins

MM/DD/YYYY
08/01/2022

MM/DD/YYYY
Ends 07/31/2023

EIN for PBGC Forms

Name Control

Effective Date of Plan
08/01/1995

Transmitter Information

Transmitter's TIN
73-1554797

Transmitter Control Code (TCC)
60H49

Contact Name
Ellen Michaels

Transmitter's Name
Employee Benefits Group, LLC

Contact Telephone Number
(918) 728-3389

Company Name
Employee Benefits Group, LLC

Contact E-Mail Address
emichaels@ebg-email.com

Company Mailing Address
2627 E. 21st St., Ste. 205

Company City, Province, State and ZIP
Tulsa OK 74114

Foreign ☐

Do NOT File with IRS, DOL or PBGC

Preparer Information

Preparer's Name	Preparer's City, Province, State and ZIP
Preparer's Firm Name	Preparer's Phone Number
Preparer's Address	Foreign ☐

Trust Information

Name of Trust	Trust EIN
Name of Trustee or Custodian	Trustee's or Custodian's Phone #

Signers, Service Providers and Interested Individuals

☒ Notify Plan Administrator	Contact Phone Number (580) 326-3351
Contact Name Rebecca Reynolds	E-Mail Address becky.reynolds@liftca.org
Contact ID	

☒ Notify Plan Administrator	Contact Phone Number (580) 326-3351
Contact Name Sheree Ensley	E-Mail Address sheree.ensley@liftca.org
Contact ID	

☒ Notify Plan Administrator	Contact Phone Number (918)688-3244
Contact Name Ellen Michaels	E-Mail Address emichaels@cbremail.com
Contact ID	

☐ Notify	Contact Phone Number
Contact Name	E-Mail Address
Contact ID	

☐ Notify	Contact Phone Number
Contact Name	E-Mail Address
Contact ID	

☐ Notify	Contact Phone Number
Contact Name	E-Mail Address
Contact ID	

☐ Notify	Contact Phone Number
Contact Name	E-Mail Address
Contact ID	

☐ Notify	Contact Phone Number
Contact Name	E-Mail Address
Contact ID	

Form 5500 Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation	Annual Return/Report of Employee Benefit Plan This form is required to be filed for employee benefit plans under sections 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA) and sections 6057(b) and 6058(a) of the Internal Revenue Code (the Code). ▶ Complete all entries in accordance with the instructions to the Form 5500.	OMB Nos. 1210-0110 1210-0089 2022 This Form is Open to Public Inspection
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Part I	Annual Report Identification Information
For calendar plan year 2022 or fiscal plan year beginning <u>08/01/2022</u> and ending <u>07/31/2023</u>	
A This return/report is for:	☐ a multiemployer plan ☐ a multiple-employer plan (Filers checking this box must attach a list of participating employer information in accordance with the form instructions.) ☒ a single-employer plan ☐ a DFE (specify) _____
B This return/report is:	☐ the first return/report ☐ the final return/report ☐ an amended return/report ☐ a short plan year return/report (less than 12 months)
C If the plan is a collectively-bargained plan, check here.	☐
D Check box if filing under:	☒ Form 5558 ☐ automatic extension ☐ the DFVC program ☐ special extension (enter description)
E If this is a retroactively adopted plan permitted by SECURE Act section 201, check here.	☐

Part II	Basic Plan Information—enter all requested information
1a Name of plan LIFT 403b Plan 2a Plan sponsor's name (employer, if for a single-employer plan) Mailing address (include room, apt., suite no. and street, or P.O. Box) City or town, state or province, country, and ZIP or foreign postal code (if foreign, see instructions) LIFT Community Action Agency, Inc. 209 North 4th Hugo OK 74743	1b Three-digit plan number (PN) ▶ <u>002</u> 1c Effective date of plan <u>08/01/1995</u> 2b Employer Identification Number (EIN) <u>73-0772321</u> 2c Plan Sponsor's telephone number (580) <u>326-3351</u> 2d Business code (see instructions) <u>621498</u>

Caution: A penalty for the late or incomplete filing of this return/report will be assessed unless reasonable cause is established.

Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as the electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct, and complete.

SIGN HERE			Rebecca Reynolds
	Signature of plan administrator	Date	Enter name of individual signing as plan administrator
SIGN HERE			
	Signature of employer/plan sponsor	Date	Enter name of individual signing as employer or plan sponsor
SIGN HERE			
	Signature of DFE	Date	Enter name of individual signing as DFE

For Paperwork Reduction Act Notice, see the Instructions for Form 5500.

Form 5500 (2022)
v. 220413

3a Plan administrator's name and address ☒ Same as Plan Sponsor		3b Administrator's EIN
		3c Administrator's telephone number
4 If the name and/or EIN of the plan sponsor or the plan name has changed since the last return/report filed for this plan, enter the plan sponsor's name, EIN, the plan name and the plan number from the last return/report: a Sponsor's name c Plan Name		4b EIN 4d PN
5 Total number of participants at the beginning of the plan year		5 329
6 Number of participants as of the end of the plan year unless otherwise stated (welfare plans complete only lines 6a(1) , 6a(2) , 6b , 6c , and 6d).		
a(1) Total number of active participants at the beginning of the plan year.....		6a(1) 329
a(2) Total number of active participants at the end of the plan year		6a(2) 215
b Retired or separated participants receiving benefits.....		6b 0
c Other retired or separated participants entitled to future benefits		6c 70
d Subtotal. Add lines 6a(2) , 6b , and 6c		6d 285
e Deceased participants whose beneficiaries are receiving or are entitled to receive benefits.		6e 0
f Total. Add lines 6d and 6e		6f 285
g Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item)		6g 285
h Number of participants who terminated employment during the plan year with accrued benefits that were less than 100% vested		6h 34
7 Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item)		7
8a If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristics Codes in the instructions: 2M 2L 2F 2G 2K 2T		
b If the plan provides welfare benefits, enter the applicable welfare feature codes from the List of Plan Characteristics Codes in the instructions:		
9a Plan funding arrangement (check all that apply) (1) ☒ Insurance (2) ☐ Code section 412(e)(3) insurance contracts (3) ☒ Trust (4) ☐ General assets of the sponsor		9b Plan benefit arrangement (check all that apply) (1) ☒ Insurance (2) ☐ Code section 412(e)(3) insurance contracts (3) ☒ Trust (4) ☐ General assets of the sponsor
10 Check all applicable boxes in 10a and 10b to indicate which schedules are attached, and, where indicated, enter the number attached. (See instructions)		
a Pension Schedules (1) ☒ R (Retirement Plan Information) (2) ☐ MB (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) - signed by the plan actuary (3) ☐ SB (Single-Employer Defined Benefit Plan Actuarial Information) - signed by the plan actuary		b General Schedules (1) ☒ H (Financial Information) (2) ☐ I (Financial Information – Small Plan) (3) ☒ <u> 1 </u> A (Insurance Information) (4) ☒ C (Service Provider Information) (5) ☐ D (DFE/Participating Plan Information) (6) ☐ G (Financial Transaction Schedules)

Part III	Form M-1 Compliance Information (to be completed by welfare benefit plans)
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11a If the plan provides welfare benefits, was the plan subject to the Form M-1 filing requirements during the plan year? (See instructions and 29 CFR 2520.101-2.) ☐ Yes ☐ No

If "Yes" is checked, complete lines 11b and 11c.

11b Is the plan currently in compliance with the Form M-1 filing requirements? (See instructions and 29 CFR 2520.101-2.) ☐ Yes ☐ No

11c Enter the Receipt Confirmation Code for the 2022 Form M-1 annual report. If the plan was not required to file the 2022 Form M-1 annual report, enter the Receipt Confirmation Code for the most recent Form M-1 that was required to be filed under the Form M-1 filing requirements. (Failure to enter a valid Receipt Confirmation Code will subject the Form 5500 filing to rejection as incomplete.)

Receipt Confirmation Code _____

SCHEDULE A (Form 5500) Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation	Insurance Information This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA). ► File as an attachment to Form 5500. ► Insurance companies are required to provide the information pursuant to ERISA section 103(a)(2).	OMB No. 1210-0110 2022 This Form is Open to Public Inspection
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For calendar plan year 2022 or fiscal plan year beginning 08/01/2022 and ending 07/31/2023					
A Name of plan LIFT 403b Plan	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:70%;">B Three-digit plan number (PN) ►</td> <td style="width:30%; text-align: center;">002</td> </tr> <tr> <td colspan="2" style="height: 20px;"></td> </tr> </table>	B Three-digit plan number (PN) ►	002		
B Three-digit plan number (PN) ►	002				
C Plan sponsor's name as shown on line 2a of Form 5500 LIFT Community Action Agency, Inc.	D Employer Identification Number (EIN) 73-0772321				

Part I	Information Concerning Insurance Contract Coverage, Fees, and Commissions Provide information for each contract on a separate Schedule A. Individual contracts grouped as a unit in Parts II and III can be reported on a single Schedule A.
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1 Coverage Information:

(a) Name of insurance carrier

Great West Life & Annuity Insurance Co.

(b) EIN	(c) NAIC code	(d) Contract or identification number	(e) Approximate number of persons covered at end of policy or contract year	Policy or contract year	
				(f) From	(g) To
84-0467907	68322	511626-01	173	08/01/2022	07/31/2023

2 Insurance fee and commission information. Enter the total fees and total commissions paid. List in line 3 the agents, brokers, and other persons in descending order of the amount paid.

(a) Total amount of commissions paid	(b) Total amount of fees paid
0	0

3 Persons receiving commissions and fees. (Complete as many entries as needed to report all persons).

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

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	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

Part II Investment and Annuity Contract Information

Where individual contracts are provided, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

4 Current value of plan's interest under this contract in the general account at year end **4** 3,427,922**5** Current value of plan's interest under this contract in separate accounts at year end **5****6** Contracts With Allocated Funds:**a** State the basis of premium rates ▶**b** Premiums paid to carrier **6b****c** Premiums due but unpaid at the end of the year **6c****d** If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, enter amount. **6d**
Specify nature of costs ▶**e** Type of contract: (1) ☐ individual policies (2) ☐ group deferred annuity(3) ☐ other (specify) ▶**f** If contract purchased, in whole or in part, to distribute benefits from a terminating plan, check here ▶ ☐**7** Contracts With Unallocated Funds (Do not include portions of these contracts maintained in separate accounts)**a** Type of contract: (1) ☐ deposit administration (2) ☐ immediate participation guarantee(3) ☐ guaranteed investment (4) ☒ other ▶ Group Annuity Contract**b** Balance at the end of the previous year **7b** 4,124,777**c** Additions: (1) Contributions deposited during the year **7c(1)** 150,802(2) Dividends and credits **7c(2)**(3) Interest credited during the year **7c(3)** 74,253(4) Transferred from separate account **7c(4)** 697,844(5) Other (specify below) **7c(5)** 60,513

▶ Ln Repayments, Forfeitures

(6) Total additions **7c(6)** 983,412**d** Total of balance and additions (add lines **7b** and **7c(6)**). **7d** 5,108,189**e** Deductions:(1) Disbursed from fund to pay benefits or purchase annuities during year **7e(1)** 1,154,406(2) Administration charge made by carrier **7e(2)** 17,109(3) Transferred to separate account **7e(3)** 508,752(4) Other (specify below) **7e(4)**(5) Total deductions **7e(5)** 1,680,267**f** Balance at the end of the current year (subtract line **7e(5)** from line **7d**). **7f** 3,427,922

Part III Welfare Benefit Contract Information

If more than one contract covers the same group of employees of the same employer(s) or members of the same employee organizations(s), the information may be combined for reporting purposes if such contracts are experience-rated as a unit. Where contracts cover individual employees, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

8 Benefit and contract type (check all applicable boxes)

- a** ☐ Health (other than dental or vision)
b ☐ Dental
c ☐ Vision
d ☐ Life insurance
e ☐ Temporary disability (accident and sickness)
f ☐ Long-term disability
g ☐ Supplemental unemployment
h ☐ Prescription drug
i ☐ Stop loss (large deductible)
j ☐ HMO contract
k ☐ PPO contract
l ☐ Indemnity contract
m ☐ Other (specify) ▶

9 Experience-rated contracts:

a Premiums: (1) Amount received	9a(1)		
(2) Increase (decrease) in amount due but unpaid	9a(2)		
(3) Increase (decrease) in unearned premium reserve	9a(3)		
(4) Earned ((1) + (2) - (3))		9a(4)	
b Benefit charges (1) Claims paid	9b(1)		
(2) Increase (decrease) in claim reserves	9b(2)		
(3) Incurred claims (add (1) and (2))		9b(3)	
(4) Claims charged		9b(4)	
c Remainder of premium: (1) Retention charges (on an accrual basis) --			
(A) Commissions	9c(1)(A)		
(B) Administrative service or other fees	9c(1)(B)		
(C) Other specific acquisition costs	9c(1)(C)		
(D) Other expenses	9c(1)(D)		
(E) Taxes	9c(1)(E)		
(F) Charges for risks or other contingencies	9c(1)(F)		
(G) Other retention charges	9c(1)(G)		
(H) Total retention		9c(1)(H)	
(2) Dividends or retroactive rate refunds. (These amounts were ☐ paid in cash, or ☐ credited.)		9c(2)	
d Status of policyholder reserves at end of year: (1) Amount held to provide benefits after retirement		9d(1)	
(2) Claim reserves		9d(2)	
(3) Other reserves		9d(3)	
e Dividends or retroactive rate refunds due. (Do not include amount entered in line 9c(2).)		9e	

10 Nonexperience-rated contracts:

a Total premiums or subscription charges paid to carrier	10a	
b If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, other than reported in Part I, line 2 above, report amount. Specify nature of costs.	10b	

Part IV Provision of Information

11 Did the insurance company fail to provide any information necessary to complete Schedule A? ☐ Yes ☒ No

12 If the answer to line 11 is "Yes," specify the information not provided. ▶

SCHEDULE C (Form 5500) Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation	Service Provider Information This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA). ▶ File as an attachment to Form 5500.	OMB No. 1210-0110 2022 This Form is Open to Public Inspection.
For calendar plan year 2022 or fiscal plan year beginning 08/01/2022 and ending 07/31/2023		
A Name of plan LIFT 403b Plan	B Three-digit plan number (PN) ▶	002
C Plan sponsor's name as shown on line 2a of Form 5500 LIFT Community Action Agency, Inc.	D Employer Identification Number (EIN) 73-0772321	

Part I	Service Provider Information (see instructions)
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You must complete this Part, in accordance with the instructions, to report the information required for **each person** who received, directly or indirectly, \$5,000 or more in total compensation (i.e., money or anything else of monetary value) in connection with services rendered to the plan or the person's position with the plan during the plan year. If a person received **only** eligible indirect compensation for which the plan received the required disclosures, you are required to answer line 1 but are not required to include that person when completing the remainder of this Part.

1 Information on Persons Receiving Only Eligible Indirect Compensation

a Check "Yes" or "No" to indicate whether you are excluding a person from the remainder of this Part because they received only eligible indirect compensation for which the plan received the required disclosures (see instructions for definitions and conditions)..... ☐ Yes ☒ No

b If you answered line 1a "Yes," enter the name and EIN or address of each person providing the required disclosures for the service providers who received only eligible indirect compensation. Complete as many entries as needed (see instructions).

(b) Enter name and EIN or address of person who provided you disclosures on eligible indirect compensation
--

(b) Enter name and EIN or address of person who provided you disclosures on eligible indirect compensation
--

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(b) Enter name and EIN or address of person who provided you disclosures on eligible indirect compensation

2. Information on Other Service Providers Receiving Direct or Indirect Compensation. Except for those persons for whom you answered "Yes" to line 1a above, complete as many entries as needed to list each person receiving, directly or indirectly, \$5,000 or more in total compensation (i.e., money or anything else of value) in connection with services rendered to the plan or their position with the plan during the plan year. (See instructions).

(a) Enter name and EIN or address (see instructions)

Empower Advisory Group, LLC

8515 E. Orchard Rd.

Greenwood Village

CO 80111

(b) Service Code(s)	(c) Relationship to employer, employee organization, or person known to be a party-in-interest	(d) Enter direct compensation paid by the plan. If none, enter -0-.	(e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor)	(f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures?	(g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-.	(h) Did the service provider give you a formula instead of an amount or estimated amount?
28	Invest. Mgmt	1,783	Yes ☐ No ☒	Yes ☐ No ☐		Yes ☐ No ☐

(a) Enter name and EIN or address (see instructions)

Gallagher Benefit Services, Inc.
36-4291971

(b) Service Code(s)	(c) Relationship to employer, employee organization, or person known to be a party-in-interest	(d) Enter direct compensation paid by the plan. If none, enter -0-.	(e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor)	(f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures?	(g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-.	(h) Did the service provider give you a formula instead of an amount or estimated amount?
27	Investment Advisor	30,000	Yes ☐ No ☒	Yes ☐ No ☐		Yes ☐ No ☐

(a) Enter name and EIN or address (see instructions)

Employee Benefits Group, LLC
73-1554797

(b) Service Code(s)	(c) Relationship to employer, employee organization, or person known to be a party-in-interest	(d) Enter direct compensation paid by the plan. If none, enter -0-.	(e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor)	(f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures?	(g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-.	(h) Did the service provider give you a formula instead of an amount or estimated amount?
13	Third Party Admin	8,903	Yes ☐ No ☒	Yes ☐ No ☐		Yes ☐ No ☐

2. Information on Other Service Providers Receiving Direct or Indirect Compensation. Except for those persons for whom you answered "Yes" to line 1a above, complete as many entries as needed to list each person receiving, directly or indirectly, \$5,000 or more in total compensation (i.e., money or anything else of value) in connection with services rendered to the plan or their position with the plan during the plan year. (See instructions).

(a) Enter name and EIN or address (see instructions)

Great West Life & Annuity Insurance

8515 E. Orchard Rd.

Greenwood Village

CO 80111

(b) Service Code(s)	(c) Relationship to employer, employee organization, or person known to be a party-in-interest	(d) Enter direct compensation paid by the plan. If none, enter -0-.	(e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor)	(f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures?	(g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-.	(h) Did the service provider give you a formula instead of an amount or estimated amount?
64	Recordkeeper	17,119	Yes ☒ No ☐	Yes ☒ No ☐	0	Yes ☒ No ☐

(a) Enter name and EIN or address (see instructions)

(b) Service Code(s)	(c) Relationship to employer, employee organization, or person known to be a party-in-interest	(d) Enter direct compensation paid by the plan. If none, enter -0-.	(e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor)	(f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures?	(g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-.	(h) Did the service provider give you a formula instead of an amount or estimated amount?
			Yes ☐ No ☐	Yes ☐ No ☐		Yes ☐ No ☐

(a) Enter name and EIN or address (see instructions)

(b) Service Code(s)	(c) Relationship to employer, employee organization, or person known to be a party-in-interest	(d) Enter direct compensation paid by the plan. If none, enter -0-.	(e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor)	(f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures?	(g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-.	(h) Did the service provider give you a formula instead of an amount or estimated amount?
			Yes ☐ No ☐	Yes ☐ No ☐		Yes ☐ No ☐

Part I Service Provider Information (continued)

3. If you reported on line 2 receipt of indirect compensation, other than eligible indirect compensation, by a service provider, and the service provider is a fiduciary or provides contract administrator, consulting, custodial, investment advisory, investment management, broker, or recordkeeping services, answer the following questions for (a) each source from whom the service provider received \$1,000 or more in indirect compensation and (b) each source for whom the service provider gave you a formula used to determine the indirect compensation instead of an amount or estimated amount of the indirect compensation. Complete as many entries as needed to report the required information for each source.

(a) Enter service provider name as it appears on line 2	(b) Service Codes (see instructions)	(c) Enter amount of indirect compensation
(d) Enter name and EIN (address) of source of indirect compensation	(e) Describe the indirect compensation, including any formula used to determine the service provider's eligibility for or the amount of the indirect compensation.	
(a) Enter service provider name as it appears on line 2	(b) Service Codes (see instructions)	(c) Enter amount of indirect compensation
(d) Enter name and EIN (address) of source of indirect compensation	(e) Describe the indirect compensation, including any formula used to determine the service provider's eligibility for or the amount of the indirect compensation.	
(a) Enter service provider name as it appears on line 2	(b) Service Codes (see instructions)	(c) Enter amount of indirect compensation
(d) Enter name and EIN (address) of source of indirect compensation	(e) Describe the indirect compensation, including any formula used to determine the service provider's eligibility for or the amount of the indirect compensation.	

Part II Service Providers Who Fail or Refuse to Provide Information

4 Provide, to the extent possible, the following information for each service provider who failed or refused to provide the information necessary to complete this Schedule.

(a) Enter name and EIN or address of service provider (see instructions)	(b) Nature of Service Code(s)	(c) Describe the information that the service provider failed or refused to provide
(a) Enter name and EIN or address of service provider (see instructions)	(b) Nature of Service Code(s)	(c) Describe the information that the service provider failed or refused to provide
(a) Enter name and EIN or address of service provider (see instructions)	(b) Nature of Service Code(s)	(c) Describe the information that the service provider failed or refused to provide
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(a) Enter name and EIN or address of service provider (see instructions)	(b) Nature of Service Code(s)	(c) Describe the information that the service provider failed or refused to provide
(a) Enter name and EIN or address of service provider (see instructions)	(b) Nature of Service Code(s)	(c) Describe the information that the service provider failed or refused to provide

Part III	Termination Information on Accountants and Enrolled Actuaries (see instructions) (complete as many entries as needed)
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a Name:	b EIN:
c Position:	
d Address:	e Telephone:

Explanation:

a Name:	b EIN:
c Position:	
d Address:	e Telephone:

Explanation:

a Name:	b EIN:
c Position:	
d Address:	e Telephone:

Explanation:

a Name:	b EIN:
c Position:	
d Address:	e Telephone:

Explanation:

a Name:	b EIN:
c Position:	
d Address:	e Telephone:

Explanation:

SCHEDULE H (Form 5500) Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation	Financial Information This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 6058(a) of the Internal Revenue Code (the Code). ► File as an attachment to Form 5500.	OMB No. 1210-0110 2022 This Form is Open to Public Inspection
For calendar plan year 2022 or fiscal plan year beginning 08/01/2022 and ending 07/31/2023		
A Name of plan LIFT 403b Plan	B Three-digit plan number (PN) ►	002
C Plan sponsor's name as shown on line 2a of Form 5500 LIFT Community Action Agency, Inc.	D Employer Identification Number (EIN) 73-0772321	

Part I Asset and Liability Statement			
1 Current value of plan assets and liabilities at the beginning and end of the plan year. Combine the value of plan assets held in more than one trust. Report the value of the plan's interest in a commingled fund containing the assets of more than one plan on a line-by-line basis unless the value is reportable on lines 1c(9) through 1c(14). Do not enter the value of that portion of an insurance contract which guarantees, during this plan year, to pay a specific dollar benefit at a future date. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IEs do not complete lines 1b(1), 1b(2), 1c(8), 1g, 1h, and 1i. CCTs, PSAs, and 103-12 IEs also do not complete lines 1d and 1e. See instructions.			
Assets		(a) Beginning of Year	(b) End of Year
a Total noninterest-bearing cash.....	1a	31, 090	30, 817
b Receivables (less allowance for doubtful accounts):			
(1) Employer contributions	1b(1)	2, 771	23, 687
(2) Participant contributions.....	1b(2)	2, 613	15, 045
(3) Other	1b(3)		
c General investments:			
(1) Interest-bearing cash (include money market accounts & certificates of deposit)	1c(1)		
(2) U.S. Government securities	1c(2)		
(3) Corporate debt instruments (other than employer securities):			
(A) Preferred	1c(3)(A)		
(B) All other.....	1c(3)(B)		
(4) Corporate stocks (other than employer securities):			
(A) Preferred	1c(4)(A)		
(B) Common	1c(4)(B)		
(5) Partnership/joint venture interests	1c(5)		
(6) Real estate (other than employer real property)	1c(6)		
(7) Loans (other than to participants).....	1c(7)		
(8) Participant loans	1c(8)	407, 518	377, 878
(9) Value of interest in common/collective trusts	1c(9)		
(10) Value of interest in pooled separate accounts	1c(10)		
(11) Value of interest in master trust investment accounts.....	1c(11)		
(12) Value of interest in 103-12 investment entities	1c(12)		
(13) Value of interest in registered investment companies (e.g., mutual funds)	1c(13)	7, 509, 033	7, 951, 003
(14) Value of funds held in insurance company general account (unallocated contracts).....	1c(14)		
(15) Other.....	1c(15)	4, 093, 687	3, 397, 105

1d Employer-related investments:		(a) Beginning of Year	(b) End of Year
(1) Employer securities.....	1d(1)		
(2) Employer real property.....	1d(2)		
e Buildings and other property used in plan operation	1e		
f Total assets (add all amounts in lines 1a through 1e)	1f	12, 046, 712	11, 795, 535

Liabilities

g Benefit claims payable	1g		
h Operating payables	1h		
i Acquisition indebtedness.....	1i		
j Other liabilities.....	1j		5, 284
k Total liabilities (add all amounts in lines 1g through 1j)	1k	0	5, 284

Net Assets

l Net assets (subtract line 1k from line 1f)	1l	12, 046, 712	11, 790, 251
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Part II Income and Expense Statement

2 Plan income, expenses, and changes in net assets for the year. Include all income and expenses of the plan, including any trust(s) or separately maintained fund(s) and any payments/receipts to/from insurance carriers. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IEs do not complete lines 2a, 2b(1)(E), 2e, 2f, and 2g.

Income

		(a) Amount	(b) Total
a Contributions:			
(1) Received or receivable in cash from: (A) Employers	2a(1)(A)	592, 527	
(B) Participants	2a(1)(B)	364, 113	
(C) Others (including rollovers).....	2a(1)(C)		
(2) Noncash contributions.....	2a(2)		
(3) Total contributions. Add lines 2a(1)(A) , (B) , (C) , and line 2a(2)	2a(3)		956, 640
b Earnings on investments:			
(1) Interest:			
(A) Interest-bearing cash (including money market accounts and certificates of deposit).....	2b(1)(A)		
(B) U.S. Government securities	2b(1)(B)		
(C) Corporate debt instruments	2b(1)(C)		
(D) Loans (other than to participants)	2b(1)(D)		
(E) Participant loans.....	2b(1)(E)	21, 254	
(F) Other	2b(1)(F)		
(G) Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G)		21, 254
(2) Dividends: (A) Preferred stock.....	2b(2)(A)		
(B) Common stock	2b(2)(B)		
(C) Registered investment company shares (e.g. mutual funds).....	2b(2)(C)	246, 439	
(D) Total dividends. Add lines 2b(2)(A) , (B) , and (C)	2b(2)(D)		246, 439
(3) Rents	2b(3)		
(4) Net gain (loss) on sale of assets: (A) Aggregate proceeds	2b(4)(A)		
(B) Aggregate carrying amount (see instructions).....	2b(4)(B)		
(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C)		0
(5) Unrealized appreciation (depreciation) of assets: (A) Real estate	2b(5)(A)		
(B) Other	2b(5)(B)		
(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)	2b(5)(C)		0

		(a) Amount	(b) Total
(6) Net investment gain (loss) from common/collective trusts.....	2b(6)		
(7) Net investment gain (loss) from pooled separate accounts.....	2b(7)		
(8) Net investment gain (loss) from master trust investment accounts	2b(8)		
(9) Net investment gain (loss) from 103-12 investment entities	2b(9)		
(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)	2b(10)		310,676
c Other income	2c		
d Total income. Add all income amounts in column (b) and enter total.....	2d		1,535,009

Expenses

e Benefit payment and payments to provide benefits:			
(1) Directly to participants or beneficiaries, including direct rollovers.....	2e(1)	1,726,984	
(2) To insurance carriers for the provision of benefits	2e(2)		
(3) Other.....	2e(3)		
(4) Total benefit payments. Add lines 2e(1) through (3)	2e(4)		1,726,984
f Corrective distributions (see instructions)	2f		5,284
g Certain deemed distributions of participant loans (see instructions).....	2g		6,131
h Interest expense.....	2h		
i Administrative expenses: (1) Professional fees	2i(1)	53,071	
(2) Contract administrator fees	2i(2)		
(3) Investment advisory and management fees	2i(3)		
(4) Other.....	2i(4)		
(5) Total administrative expenses. Add lines 2i(1) through (4)	2i(5)		53,071
j Total expenses. Add all expense amounts in column (b) and enter total.....	2j		1,791,470

Net Income and Reconciliation

k Net income (loss). Subtract line 2j from line 2d.....	2k		-256,461
l Transfers of assets:			
(1) To this plan.....	2l(1)		
(2) From this plan	2l(2)		

Part III Accountant's Opinion

3 Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.

a The attached opinion of an independent qualified public accountant for this plan is (see instructions):

(1) ☒ Unmodified (2) ☐ Qualified (3) ☐ Disclaimer (4) ☐ Adverse

b Check the appropriate box(es) to indicate whether the IQPA performed an ERISA section 103(a)(3)(C) audit. Check both boxes (1) and (2) if the audit was performed pursuant to both 29 CFR 2520.103-8 and 29 CFR 2520.103-12(d). Check box (3) if pursuant to neither.

(1) ☒ DOL Regulation 2520.103-8 (2) ☐ DOL Regulation 2520.103-12(d) (3) ☐ neither DOL Regulation 2520.103-8 nor DOL Regulation 2520.103-12(d).

c Enter the name and EIN of the accountant (or accounting firm) below:

(1) Name: FINLEY & COOK, PLLC

(2) EIN: 73-0604334

d The opinion of an independent qualified public accountant is **not attached** because:

(1) ☐ This form is filed for a CCT, PSA, or MTIA. (2) ☐ It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.

Part IV Compliance Questions

4 CCTs and PSAs do not complete Part IV. MTIAs, 103-12 IEs, and GIAs do not complete lines 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete lines 4j and 4l. MTIAs also do not complete line 4l.

During the plan year:

a Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.)

	Yes	No	Amount
4a		X	

	Yes	No	Amount
b Were any loans by the plan or fixed income obligations due the plan in default as of the close of the plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part I if "Yes" is checked.)			
4b		X	
c Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)			
4c		X	
d Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)			
4d		X	
e Was this plan covered by a fidelity bond?	X		1,000,000
f Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?		X	
4f		X	
g Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?		X	
4g		X	
h Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?		X	
4h		X	
i Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)	X		
4i	X		
j Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)		X	
4j		X	
k Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?		X	
4k		X	
l Has the plan failed to provide any benefit when due under the plan?		X	
4l		X	
m If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)		X	
4m		X	
n If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3.			
4n			
5a Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? ☐ Yes ☒ No If "Yes," enter the amount of any plan assets that reverted to the employer this year _____.			
5b If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)			
5b(1) Name of plan(s)	5b(2) EIN(s)	5b(3) PN(s)	
5c Was the plan a defined benefit plan covered under the PBGC insurance program at any time during this plan year? (See ERISA section 4021 and instructions.) ☐ Yes ☐ No ☐ Not determined If "Yes" is checked, enter the My PAA confirmation number from the PBGC premium filing for this plan year _____.			

SCHEDULE R (Form 5500) Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation	Retirement Plan Information This schedule is required to be filed under sections 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA) and section 6058(a) of the Internal Revenue Code (the Code). ▶ File as an attachment to Form 5500.	OMB No. 1210-0110 2022 This Form is Open to Public Inspection.
For calendar plan year 2022 or fiscal plan year beginning 08/01/2022 and ending 07/31/2023		
A Name of plan LIFT 403b Plan	B Three-digit plan number (PN) ▶	002
C Plan sponsor's name as shown on line 2a of Form 5500 LIFT Community Action Agency, Inc.	D Employer Identification Number (EIN) 73-0772321	

Part I	Distributions
---------------	----------------------

All references to distributions relate only to payments of benefits during the plan year.

- | | | |
|--|----------|--|
| 1 Total value of distributions paid in property other than in cash or the forms of property specified in the instructions..... | 1 | |
| 2 Enter the EIN(s) of payor(s) who paid benefits on behalf of the plan to participants or beneficiaries during the year (if more than two, enter EINs of the two payors who paid the greatest dollar amounts of benefits):

EIN(s): <u>84-0467907</u> | | |
| Profit-sharing plans, ESOPs, and stock bonus plans, skip line 3. | | |
| 3 Number of participants (living or deceased) whose benefits were distributed in a single sum, during the plan year | 3 | |

Part II	Funding Information (If the plan is not subject to the minimum funding requirements of section 412 of the Internal Revenue Code or ERISA section 302, skip this Part.)
----------------	---

- 4** Is the plan administrator making an election under Code section 412(d)(2) or ERISA section 302(d)(2)? ☐ Yes ☐ No ☐ N/A

If the plan is a defined benefit plan, go to line 8.

5 If a waiver of the minimum funding standard for a prior year is being amortized in this plan year, see instructions and enter the date of the ruling letter granting the waiver. **Date:** Month _____ Day _____ Year _____

If you completed line 5, complete lines 3, 9, and 10 of Schedule MB and do not complete the remainder of this schedule.

6 a	Enter the minimum required contribution for this plan year (include any prior year accumulated funding deficiency not waived)
6 b	Enter the amount contributed by the employer to the plan for this plan year
6 c	Subtract the amount in line 6b from the amount in line 6a. Enter the result (enter a minus sign to the left of a negative amount)

If you completed line 6c, skip lines 8 and 9.

7 Will the minimum funding amount reported on line 6c be met by the funding deadline? ☐ Yes ☐ No ☐ N/A

8 If a change in actuarial cost method was made for this plan year pursuant to a revenue procedure or other authority providing automatic approval for the change or a class ruling letter, does the plan sponsor or plan administrator agree with the change? ☐ Yes ☐ No ☐ N/A

Part III	Amendments
-----------------	-------------------

- 9** If this is a defined benefit pension plan, were any amendments adopted during this plan year that increased or decreased the value of benefits? If yes, check the appropriate box. If no, check the "No" box..... ☐ Increase ☐ Decrease ☐ Both ☐ No

Part IV	ESOPs (see instructions). If this is not a plan described under section 409(a) or 4975(e)(7) of the Internal Revenue Code, skip this Part.
----------------	---

- | | | | |
|-------------|--|------------------------------|-----------------------------|
| 10 | Were unallocated employer securities or proceeds from the sale of unallocated securities used to repay any exempt loan? | ☐ Yes | ☐ No |
| 11 a | Does the ESOP hold any preferred stock? | ☐ Yes | ☐ No |
| b | If the ESOP has an outstanding exempt loan with the employer as lender, is such loan part of a "back-to-back" loan?
(See instructions for definition of "back-to-back" loan.) | ☐ Yes | ☐ No |
| 12 | Does the ESOP hold any stock that is not readily tradable on an established securities market? | ☐ Yes | ☐ No |

Part V Additional Information for Multiemployer Defined Benefit Pension Plans

13 Enter the following information for each employer that (1) contributed more than 5% of total contributions to the plan during the plan year or (2) was one of the top-ten highest contributors (measured in dollars). See instructions. *Complete as many entries as needed to report all applicable employers.*

a	Name of contributing employer		
b	EIN	c	Dollar amount contributed by employer
d	Date collective bargaining agreement expires (If employer contributes under more than one collective bargaining agreement, check box ☐ and see instructions regarding required attachment. Otherwise, enter the applicable date.) Month Day Year 		
e	Contribution rate information (If more than one rate applies, check this box ☐ and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)		
	(1) Contribution rate (in dollars and cents) 		
	(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): 		
a	Name of contributing employer		
b	EIN	c	Dollar amount contributed by employer
d	Date collective bargaining agreement expires (If employer contributes under more than one collective bargaining agreement, check box ☐ and see instructions regarding required attachment. Otherwise, enter the applicable date.) Month Day Year 		
e	Contribution rate information (If more than one rate applies, check this box ☐ and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)		
	(1) Contribution rate (in dollars and cents) 		
	(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): 		
a	Name of contributing employer		
b	EIN	c	Dollar amount contributed by employer
d	Date collective bargaining agreement expires (If employer contributes under more than one collective bargaining agreement, check box ☐ and see instructions regarding required attachment. Otherwise, enter the applicable date.) Month Day Year 		
e	Contribution rate information (If more than one rate applies, check this box ☐ and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)		
	(1) Contribution rate (in dollars and cents) 		
	(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): 		
a	Name of contributing employer		
b	EIN	c	Dollar amount contributed by employer
d	Date collective bargaining agreement expires (If employer contributes under more than one collective bargaining agreement, check box ☐ and see instructions regarding required attachment. Otherwise, enter the applicable date.) Month Day Year 		
e	Contribution rate information (If more than one rate applies, check this box ☐ and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)		
	(1) Contribution rate (in dollars and cents) 		
	(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): 		
a	Name of contributing employer		
b	EIN	c	Dollar amount contributed by employer
d	Date collective bargaining agreement expires (If employer contributes under more than one collective bargaining agreement, check box ☐ and see instructions regarding required attachment. Otherwise, enter the applicable date.) Month Day Year 		
e	Contribution rate information (If more than one rate applies, check this box ☐ and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)		
	(1) Contribution rate (in dollars and cents) 		
	(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): 		

14 Enter the number of deferred vested and retired participants (inactive participants), as of the beginning of the plan year, whose contributing employer is no longer making contributions to the plan for:		
a The current plan year. Check the box to indicate the counting method used to determine the number of inactive participants: ☐ last contributing employer ☐ alternative ☐ reasonable approximation (see instructions for required attachment).....	14a	
b The plan year immediately preceding the current plan year. ☐ Check the box if the number reported is a change from what was previously reported (see instructions for required attachment).....	14b	
c The second preceding plan year. ☐ Check the box if the number reported is a change from what was previously reported (see instructions for required attachment).....	14c	
15 Enter the ratio of the number of participants under the plan on whose behalf no employer had an obligation to make an employer contribution during the current plan year to:		
a The corresponding number for the plan year immediately preceding the current plan year	15a	
b The corresponding number for the second preceding plan year	15b	
16 Information with respect to any employers who withdrew from the plan during the preceding plan year:		
a Enter the number of employers who withdrew during the preceding plan year	16a	
b If line 16a is greater than 0, enter the aggregate amount of withdrawal liability assessed or estimated to be assessed against such withdrawn employers.....	16b	
17 If assets and liabilities from another plan have been transferred to or merged with this plan during the plan year, check box and see instructions regarding supplemental information to be included as an attachment. ☐		

Part VI Additional Information for Single-Employer and Multiemployer Defined Benefit Pension Plans

18 If any liabilities to participants or their beneficiaries under the plan as of the end of the plan year consist (in whole or in part) of liabilities to such participants and beneficiaries under two or more pension plans as of immediately before such plan year, check box and see instructions regarding supplemental information to be included as an attachment..... ☐

19 If the total number of participants is 1,000 or more, complete lines (a) through (c)

a Enter the percentage of plan assets held as:
 Stock: _____% Investment-Grade Debt: _____% High-Yield Debt: _____% Real Estate: _____% Other: _____%

b Provide the average duration of the combined investment-grade and high-yield debt:
☐ 0-3 years ☐ 3-6 years ☐ 6-9 years ☐ 9-12 years ☐ 12-15 years ☐ 15-18 years ☐ 18-21 years ☐ 21 years or more

c What duration measure was used to calculate line 19(b)?
☐ Effective duration ☐ Macaulay duration ☐ Modified duration ☐ Other (specify): _____

20 PBGC missed contribution reporting requirements. If this is a multiemployer plan or a single-employer plan that is not covered by PBGC, skip line 20.

a Is the amount of unpaid minimum required contributions for all years from Schedule SB (Form 5500) line 40 greater than zero? ☐ Yes ☐ No

b If line 20a is "Yes," has PBGC been notified as required by ERISA sections 4043(c)(5) and/or 303(k)(4)? Check the applicable box:

☐ Yes.

☐ No. Reporting was waived under 29 CFR 4043.25(c)(2) because contributions equal to or exceeding the unpaid minimum required contribution were made by the 30th day after the due date.

☐ No. The 30-day period referenced in 29 CFR 4043.25(c)(2) has not yet ended, and the sponsor intends to make a contribution equal to or exceeding the unpaid minimum required contribution by the 30th day after the due date.

☐ No. Other. Provide explanation _____

Form **8955-SSA**Department of the Treasury
Internal Revenue Service**Annual Registration Statement Identifying Separated
Participants With Deferred Vested Benefits**This form is required to be filed under section 6057 of the Internal Revenue Code.
▶ Go to www.irs.gov/Form8955SSA for instructions and the latest information.**2022**
This Form Is NOT Open
to Public Inspection**PART I Annual Statement Identification Information**

For the plan year beginning 08/01/2022, and ending 07/31/2023

A ☐ Check here if plan is a government, church, or other plan that elects to voluntarily file Form 8955-SSA. (See instructions.)**B** ☐ Check here if this is an amended registration statement.**C** Check the appropriate box if filing under: ☐ Form 5558 ☐ Automatic extension
☐ Special extension (enter description) _____**PART II Basic Plan Information - enter all requested information****1a** Name of plan LIFT 403b Plan **1b** Plan Number (PN) 002**Plan Sponsor Information****2a** Plan sponsor's name LIFT Community Action Agency, Inc. **2b** Employer Identification Number (EIN) 73-0772321**2c** Trade name (if different from plan sponsor name) **2d** Plan sponsor's phone number (580) 326-3351**2e** In care of name**2f** Mailing address (room, apt., suite no. and street, or P.O. box) 209 North 4th **2g** City Hugo **2h** State OK **2i** ZIP code 74743**2j** Foreign province (or state) **2k** Foreign country **2l** Foreign postal code**Plan Administrator Information****3a** Plan administrator's name (if other than plan sponsor) Same **3b** Employer Identification Number (EIN)**3c** In care of name **3d** Plan administrator's phone number**3e** Mailing address (room, apt., suite no. and street, or P.O. box) **3f** City **3g** State **3h** ZIP code**3i** Foreign province (or state) **3j** Foreign country **3k** Foreign postal code**4** If the name or EIN of the **plan administrator** has changed since the last return filed for this plan, enter the name and EIN from the last filed return:
Plan administrator's name EIN**5** If the name or EIN of the **plan sponsor** has changed since the last return filed for this plan, enter the name, EIN, and plan number from that return:
Plan sponsor's name EIN Plan Number (PN)**6a** Participants who separated with a deferred vested benefit required to be reported on this Form 8955-SSA **6a** 11**b** Participants who separated with a deferred vested benefit voluntarily reported on this Form 8955-SSA in the same year as the separation occurred **6b** 0**7** Total number of participants reported on lines 6a and 6b **7** 11**8** Did the plan administrator provide an individual statement to each participant required to receive a statement? ☒ Yes ☐ No

Under penalties of perjury, I declare that I have examined this statement, and to the best of my knowledge and belief, it is true, correct, and complete.

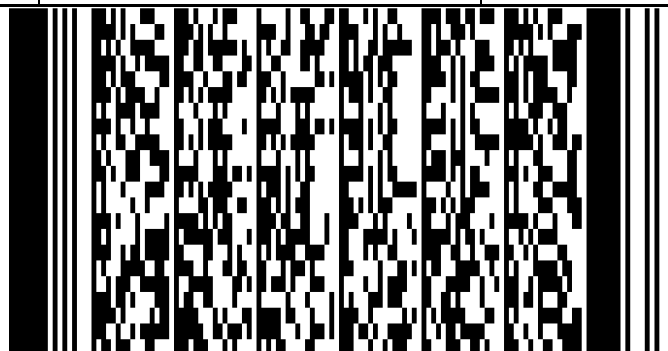
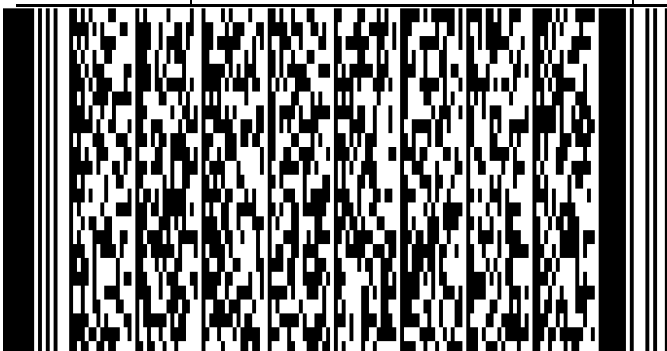
**Sign
Here**

Signature of plan sponsor

Date signed

Signature of plan administrator

Date signed



Name of plan LIFT 403b Plan	Plan Number 002	EIN 73-0772321
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PART III Participant Information - enter all requested information

9 Enter one of the following Entry Codes in column (a) for each separated participant with deferred vested benefits who:

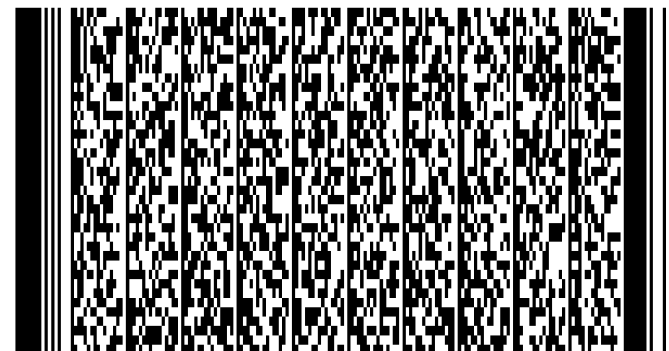
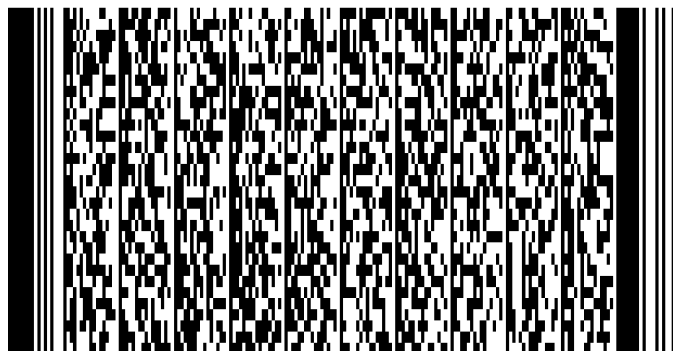
Code A — has not previously been reported.

Code B — has previously been reported under the above plan number, but whose previously reported information requires revisions.

Code C — has previously been reported under another plan, but who will be receiving benefits from the plan listed above instead.

Code D — has previously been reported under the above plan number, but whose benefits have been paid out or who is no longer entitled to those deferred vested benefits.

Use with entry code "A", "B", "C", or "D"						Use with entry code "A" or "B"				Entry code "C" only	
(a) Entry Code	(b) Full Social Security Number (or "FOREIGN")	(c) Name of Participant (See instructions.)				Enter code for nature and form of benefit		Amount of vested benefit		(h) Previous sponsor's EIN	(i) Previous plan number
		First name	M.I.	Last name	✓	(d) Type of annuity	(e) Payment frequency	(f) Defined benefit plan — periodic payment	(g) Defined contribution plan — total value of account		
A		Ashley		Bailey		A	A		17,860		
A		Megan		Bloodworth		A	A		7,726		
A		Alan		Henslee		A	A		19,686		
A		Landry		Mills		A	A		2,494		
A		Bergandy		Pearce		A	A		9,372		
A		Sheila		Pierce		A	A		64,047		
A		Paula		Savoy		A	A		8,925		
A		Jason		Stillwell		A	A		110,975		
A		Kacey		Thomas		A	A		12,693		
A		Tina		Wentworth		A	A		19,990		



Name of plan LIFT 403b Plan	Plan Number 002	EIN 73-0772321
--------------------------------	--------------------	-------------------

PART III Participant Information - enter all requested information

9 Enter one of the following Entry Codes in column (a) for each separated participant with deferred vested benefits who:

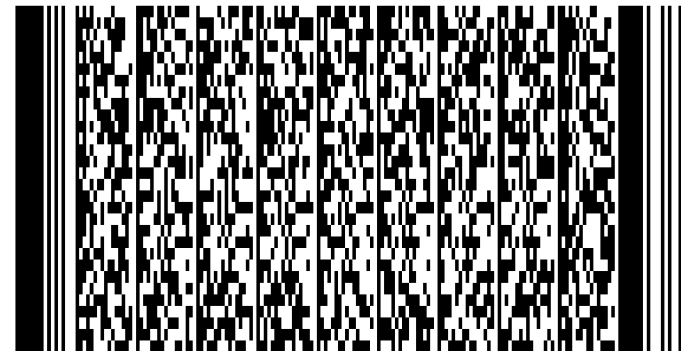
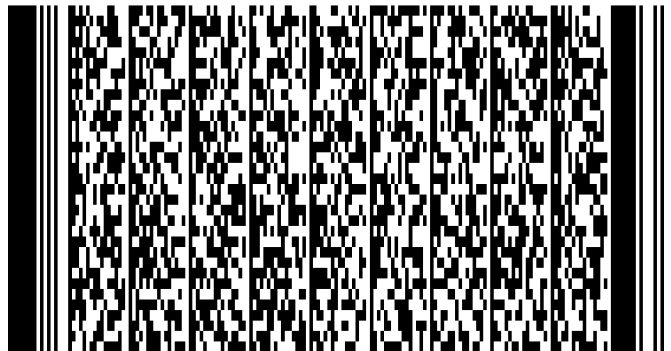
Code A — has not previously been reported.

Code B — has previously been reported under the above plan number, but whose previously reported information requires revisions.

Code C — has previously been reported under another plan, but who will be receiving benefits from the plan listed above instead.

Code D — has previously been reported under the above plan number, but whose benefits have been paid out or who is no longer entitled to those deferred vested benefits.

Use with entry code "A", "B", "C", or "D"						Use with entry code "A" or "B"				Entry code "C" only	
(a) Entry Code	(b) Full Social Security Number (or "FOREIGN")	(c) Name of Participant (See instructions.)				Enter code for nature and form of benefit		Amount of vested benefit		(h) Previous sponsor's EIN	(i) Previous plan number
		First name	M.I.	Last name	✓	(d) Type of annuity	(e) Payment frequency	(f) Defined benefit plan — periodic payment	(g) Defined contribution plan — total value of account		
A		Russell		Yoxtheimer		A	A		2,960		
D		Ellen		Trantham							
D		Linda		Bray							
D		Stella		Dennis							
D		Francis		Fuller							
D		Raymond		Jackson							
D		Lawrence		Bates							



73-0772321

Code D — has previously been reported under the above plan number, but whose benefits have been paid out or who is no longer entitled to those deferred vested benefits.

1. The first step in the process is to identify the problem. This involves gathering information about the situation and determining what needs to be solved. 2. Once the problem is identified, the next step is to develop a plan. This involves brainstorming ideas and selecting the most effective solution. 3. The third step is to implement the plan. This involves putting the chosen solution into action and monitoring progress. 4. The final step is to evaluate the results. This involves assessing the effectiveness of the solution and making adjustments as needed.

**Application for Extension of Time
To File Certain Employee Plan Returns**

► For Privacy Act and Paperwork Reduction Act Notice, see instructions.
► Go to www.irs.gov/Form5558 for the latest information.

File With IRS Only

Part I Identification

A	Name of filer, plan administrator, or plan sponsor (see instructions) LIFT Community Action Agency, Inc. Number, street, and room or suite no. (If a P.O. box, see instructions) 209 North 4th City or town, state, and ZIP code Hugo OK 74743	B	Filer's identifying number (see instructions) Employer identification number (EIN) (9 digits XX-XXXXXXX) 73-0772321 Social security number (SSN) (9 digits XXX-XX-XXXX)		
C	Plan name LIFT 403b Plan	Plan number	Plan year ending —		
		0 0 2	MM 7	DD 31	YYYY 2023

Part II Extension of Time To File Form 5500 Series, and/or Form 8955-SSA

1 ☐ Check this box if you are requesting an extension of time on line 2 to file the first Form 5500 series return/report for the plan listed in Part I, C above.

2 I request an extension of time until 5 / 15 / 2024 to file Form 5500 series. See instructions.
Note: A signature IS NOT required if you are requesting an extension to file Form 5500 series.

3 I request an extension of time until / / to file Form 8955-SSA. See instructions.
Note: A signature IS NOT required if you are requesting an extension to file Form 8955-SSA.

The application is **automatically approved** to the date shown on line 2 and/or line 3 (above) if (a) the Form 5558 is filed on or before the normal due date of Form 5500 series, and/or Form 8955-SSA for which this extension is requested; and (b) the date on line 2 and/or line 3 (above) is not later than the 15th day of the 3rd month after the normal due date.

Part III Extension of Time To File Form 5330 (see instructions)

4 I request an extension of time until / / to file Form 5330.
You may be approved for up to a 6-month extension to file Form 5330, after the normal due date of Form 5330.

a Enter the Code section(s) imposing the tax ► a

b Enter the payment amount attached ► b

c For excise taxes under section 4980 or 4980F of the Code, enter the reversion/amendment date ► c

5 **State in detail why you need the extension:**

SUMMARY ANNUAL REPORT

For LIFT 403b Plan

This is a summary of the annual report for LIFT 403b Plan, EIN 73-0772321, Plan No. 002, for period August 1, 2022 through July 31, 2023. The annual report has been filed with the Employee Benefits Security Administration, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

Basic Financial Statement

Benefits under the plan are provided by insurance and a trust fund. Plan expenses were \$1,791,470. These expenses included \$53,071 in administrative expenses, \$1,726,984 in benefits paid to participants and beneficiaries, and \$11,415 in other expenses. A total of 285 persons were participants in or beneficiaries of the plan at the end of the plan year, although not all of these persons had yet earned the right to receive benefits.

The value of plan assets, after subtracting liabilities of the plan, was \$11,790,251 as of July 31, 2023, compared to \$12,046,712 as of August 1, 2022. During the plan year the plan experienced a decrease in its net assets of \$256,461. This decrease includes unrealized appreciation and depreciation in the value of plan assets; that is, the difference between the value of the plan's assets at the end of the year and the value of the assets at the beginning of the year or the cost of assets acquired during the year. The plan had total income of \$1,535,009, including employer contributions of \$592,527, employee contributions of \$364,113, and earnings from investments of \$578,369 .

The plan has a contract with Great West Life & Annuity Insurance Co.. The total premiums paid for the plan year ending July 31, 2023 were \$0.

Your Rights To Additional Information

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

- an accountant's report;
- financial information;
- assets held for investment;
- insurance information, including sales commissions paid by insurance carriers;

To obtain a copy of the full annual report, or any part thereof, write or call the office of LIFT Community Action Agency, Inc. in care of Rebecca Reynolds who is Plan Administrator at 209 North 4th, Hugo, OK 74743, or by telephone at (580) 326-3351. The charge to cover copying costs will be \$0.00 for the full annual report, or \$0.00 per page for any part thereof.

You also have the right to receive from the plan administrator, on request and at no charge, a statement of the assets and liabilities of the plan and accompanying notes, or a statement of income and expenses of the plan and accompanying notes, or both. If you request a copy of the full annual report from the plan administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the main office of the plan (LIFT Community Action Agency, Inc., 209 North 4th, Hugo, OK 74743) and at the U.S. Department of Labor in Washington, D.C., or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, Room N-1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, N.W., Washington, D.C. 20210.

Paperwork Reduction Act Statement

According to the Paperwork Reduction Act of 1995 (Pub. L. 104-13)(PRA), no persons are required to respond to a collection of information unless such collection displays a valid Office of Management and Budget (OMB) control number. The Department notes that a Federal agency cannot conduct or sponsor a collection of information unless it displays a currently valid OMB control number. See 44 U.S.C. 3507. Also, notwithstanding any other provisions of law, no person shall be subject to penalty for failing to comply with a collection of information if the collection of information does not display a currently valid OMB control number. See 44 U.S.C. 3512.

The public reporting burden for this collection of information is estimated to average less than one minute per notice (approximately 3 hours and 11 minutes per plan). Interested parties are encouraged to send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor, Office of the Chief Information Officer, Attention: Departmental Clearance Officer, 200 Constitution Avenue, N.W., Room N-1301, Washington, DC 20210 or email DOL_PRA_PUBLIC@dol.gov and reference the OMB Control Number 1210-0040.

OMB Control Number 1210-0040 (expires 03/31/2026)

RESOLUTION

Be it resolved that the governing board for LIFT Community Action Agency, Inc

1. Authorizes the filing of FCC Form 471, Schools and Libraries Universal Service Program Services Ordered for the fiscal year 07/01/2024-06/30/2025.
2. Authorizes payment of the applicant's share subject to the following conditions:
 - (1) Approval of funding of the discounted portion by the Schools and Libraries Division (SLD) of the Universal Service Administrative Company (USAC) and
 - (2) Receipt of services during the fiscal year 07/01/2024-06/30/2025.

Signature: _____ Date: _____

Printed Name: _____ Title: _____



FRN Report
04/08/24

Report Filters:
Entity Number: 16038069
Funding Year: 2024
Used Consultant? YES
Contact: 16024809

BEN	Applicant Name						Applicant City	ST	Sites	471 No.	Filing Date	SPIN	Service Provider		471 Nickname
Year	FRN	Status	Wave	Type	486 SSD	Cont. Date	Contract Number	Award Amt.	Disc%	Request	Commitment		Disbursed	Contract Exp	FRN Nickname
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143001192	AT&T Corp.		LITT 2024 C1
2024	2499038897	Pending	N/A	IA		03/21/2024		969.12	90%	872.21		0.00	0.00	2027-06-30	1 - Internet Access (Att Various)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143001192	AT&T Corp.		LITT 2024 C1
2024	2499038912	Pending	N/A	IA		03/21/2024		12,482.16	90%	11,233.94		0.00	0.00	2027-06-30	2 - Internet Access (Att Various)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143002394	Pine Telephone Co. Inc.		LITT 2024 C1
2024	2499038936	Pending	N/A	IA				779.40	90%	701.46		0.00	0.00	2025-06-30	3 - Internet Access (Broken Bow I)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143002394	Pine Telephone Co. Inc.		LITT 2024 C1
2024	2499038994	Pending	N/A	IA				900.00	90%	810.00		0.00	0.00	2025-06-30	4 - Internet Access (Broken Bow Iii)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143001192	AT&T Corp.		LITT 2024 C1
2024	2499039027	Pending	N/A	IA				2,400.00	90%	2,160.00		0.00	0.00	2025-06-30	5 - Internet Access (Haworth)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143030560	Cebridge Telecom OK, LLC		LITT 2024 C1
2024	2499039054	Pending	N/A	IA				2,820.00	90%	2,538.00		0.00	0.00	2025-06-30	6 - Internet Access (Hugo Ii)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143002394	Pine Telephone Co. Inc.		LITT 2024 C1
2024	2499039077	Pending	N/A	IA				2,388.00	90%	2,149.20		0.00	0.00	2025-06-30	7 - Internet Access (Idabel)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143001192	AT&T Corp.		LITT 2024 C1
2024	2499039094	Pending	N/A	IA				2,400.00	90%	2,160.00		0.00	0.00	2025-06-30	8 - Internet Access (Rattan I)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143001192	AT&T Corp.		LITT 2024 C1
2024	2499039115	Pending	N/A	IA				360.00	90%	324.00		0.00	0.00	2025-06-30	9 - Internet Access (Soper)
16038069	Lift Community Action Agency, Inc.						Hugo	OK	17	241027787	2024-03-21	143002402	Valliant Telephone Company		LITT 2024 C1
2024	2499039132	Pending	N/A	IA				806.76	90%	726.08		0.00	0.00	2025-06-30	10 - Internet Access (Valliant)
Grand Total								26,305.44		23,674.89		0.00	0.00		

Training and Technical Assistance Plan
Early Head Start-Child Care Partnership Program
 LIFT Community Action Agency, Inc.
 August 1, 2024 – July 31, 2025

Partnership Staff Training

Content Area	Training Strategies	Trainer/ Responsible Staff	Date	Cost	Outcome	Evaluation
All Areas	Partnership staff will receive training related to Education, Child Abuse Awareness, Nutrition, and other prevalent topics relating to their field.	All Specialists	October 2024	\$2,500	Partnership staff will refresh their knowledge of program requirements and have the opportunity to engage with management staff for one-on-one questions.	Ongoing monitoring by Specialists, monthly reporting
All Areas	Annual Zero to Three Conference: Take Heart	Conference Trainers	August 2024	\$8,000	Partnership staff will obtain knowledge relating to their field. Due to the conference being held virtually all staff would have the opportunity to attend remotely.	Ongoing monitoring
All Areas	Partnership staff will receive training on ERSEA strategies, Education areas to enhance child outcomes, and other prevalent topics relating to their field.	All Specialists	February 2025	\$2,500	Partnership staff gain enhanced understanding of child outcomes along with the important roles they play in the ERSEA area.	Ongoing monitoring by Specialists, monthly reports, Child Plus tracking, enrollment, child outcomes
All Areas	Partnership staff will receive motivational training relating to their field in early childhood education along with program specific topics.	All Specialists	May 2025	\$2,500	Partnership staff will have a refreshed sense of purpose within their field and feel supported by the program. Partnership staff will see the role they help play in helping children succeed in their futures.	Staff retention, feedback from staff

All Areas	Partnership staff will receive training relating to behavior management within their classrooms. Trainings including but not limited to Conscious Discipline as available	Training Staff	June 2025	\$3,500	Partnership staff will grow their knowledge and skills sets in practicing effective behavior management techniques.	Ongoing monitoring, staff feedback, injury reports, site visits
All Areas	Partnership staff will be presented with information pertaining to HS/EHS Standards as well as all component areas; Education, ERSEA, Disabilities and Mental Health, Professional Development, Nutrition, Health and Safety, and Family and Community Engagement throughout Pre-Service Training. Trainers within the fields of social emotional, behavior, etc. to help prepare staff with tips and tools to use in their classroom.	All Specialists/ Applicable Trainers	June 2025	\$1,575 per day X 4 days \$6,300	Partnership staff will grow their knowledge of HS/EHS Standards and regulations, Licensing requirements, curriculum, ERSEA, Disabilities and Mental Health, Nutrition, Health and Safety, and Family and Community Engagement.	Ongoing monitoring throughout the year by Component Area Specialists
All Areas	Newly hired partnership staff will complete a one-day orientation where Head Start Standards are outlined. Each Specialist will also present their component area overview.	All Specialists	Ongoing	\$650	Partnership staff will be provided clear expectations of program requirements and standards.	Specialists will observe partnership staff during site visits
Staff Education	Partnership staff will be provided with training and necessary materials pertaining to keeping all degrees, credentials, and certifications current.	Professional Development Specialist	Ongoing	\$6,795	Partnership staff will keep education credentials and/or certifications current at all times.	PD Specialist will track and monitor degrees, certifications, and credentials to ensure compliance
Health and Safety	Partnership staff will be provided with CPR/First Aid training as newly hired or as needed to maintain compliance.	Health Specialist	Ongoing	\$1,000	Partnership staff will ensure CPR/First Aid credentials are current at all time to meet requirements.	Health Specialist will monitor and track all certifications to remain in compliance at all times
All Areas	Center Directors will be provided with trainings as necessary to comply with program requirements and facilitate best practices within performance standards,	All Specialists/ Contract Trainers as applicable, Conferences as	Ongoing	\$1,500	Center Directors will become more knowledgeable on HS/EHS Standards to ensure program compliance as well	Center Directors will provide routine monitoring; Specialists will

	these can include CLASS, ITES, PITC, etc.	applicable, webinars, online resources			as any other necessary training to ensure program success.	monitor compliance during site visits
Education	Partnership staff will receive training on the best practices to implement program curriculum within their classroom. Mentor Coaches will provide information and classroom modeling to help staff put theory to practice.	Education Specialists/ Mentor Coaches	Ongoing	\$3,068	Partnership staff will become more knowledgeable on the use of curriculum in the classroom, the importance of lesson planning, setting and monitoring goals, as well as other various aspects relating to curriculum in the classroom.	Education Specialist will monitor classroom activities when making site visits
Education	Partnership staff will receive training related to using materials to enhance the classroom environment in the educational domains; social emotional, physical, language/literacy, cognitive, and mathematics.	Education Specialists/ Contract Trainers as applicable	Ongoing	\$4,550	Partnership staff will have an increased knowledge base of using materials in the classroom to support educational domains.	Education Specialist will monitor partnership staff incorporating materials into lesson plans

Policy Council and Governing Board Training

Content Area	Training Strategies	Trainer/ Responsible Staff	Date	Cost	Outcome	Evaluation
Administration 1301.2	The Governing Board and Policy Council will receive periodic training (programmatic, regulations, policies/procedures, responsibilities/duties, etc.) through lecture, PowerPoint, handouts and Board training/resource manual.	Director, Assistant Directors, and all Specialists	Monthly	\$0	Governing Board and Policy Council will be able to carry out their program responsibilities effectively.	Self-Assessment

Training and Technical Assistance Total: \$42,863

Note: All in-person conferences/trainings are subject to change based on unforeseen cancellations and/or LIFT Community Action Agency travel restrictions.

Proclamation



WHEREAS, Community Action has made essential contributions to individuals and families across this Nation by creating economic opportunities and strengthening communities; and

WHEREAS, Community Action is a robust state and local force connecting people to life changing services and creating pathways to prosperity in 99% of all American counties; and

WHEREAS, Community Action builds and promotes economic stability as an essential aspect of enabling and enhancing stronger communities and stable homes; and

WHEREAS, Community Action promotes community-wide solutions to challenges throughout our cities, suburbs, and rural areas; and

WHEREAS, Community Action delivers innovative services and supports that create greater opportunities for families and children to succeed; and

WHEREAS, Community Action insists on community participation and involvement ensuring that all sectors of the community have a voice and will be heard; and

WHEREAS, Community Action is celebrating 60 years of innovation, impact, and providing proven results for Americans.

NOW, THEREFORE, I David Hawkins do hereby proclaim May 2024 as Community Action Month in recognition of the hard work and dedication of all Community Action Agencies.

IN TESTIMONY WHEREOF, I have hereunto set my hand and caused to be affixed the Great Seal of LIFT Community Action Agency, Inc., on this day of 14th of May 2024.

SIGNATURE OF: David Hawkins

LIFT

Community Action Agency, Inc.

*Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman*

Whereas NeighborWorks Week celebrates the way NeighborWorks, network organizations and residents work together to enhance lives; and

Whereas NeighborWorks Week showcases the work of local organizations empowering people to act so they can achieve their goals for safer, more secure housing and healthier, thriving communities; and

Whereas NeighborWorks Week was initiated in 1983 by a United States congressional resolution cosponsored by nearly 250 members of Congress and signed by President Ronald Reagan; and

Whereas NeighborWorks Week is an annual, national celebration held the first through the second Saturday in June; and

Whereas NeighborWorks Week celebrates neighborhood success, empowerment, pride and unity among nearly 250 organizations in all 50 states, Washington D.C. and Puerto Rico; and

Whereas LIFT Community Action Agency, Inc., a NeighborWorks network organization, has worked in the Counties of Choctaw, McCurtain and Pushmataha for 56 years;

Now, therefore, I, David Hawkins Board Chairman of LIFT Community Action Agency, Inc., on behalf of the Board of Directors, do hereby proclaim Saturday, June 1, through Saturday, June 8, 2024, to be

NeighborWorks Week

in the counties of Choctaw, McCurtain and Pushmataha, and urge all citizens to participate in the activities planned by LIFT Community Action Agency, Inc.

In testimony thereof, I have hereunto set my hand and caused to be affixed the seal of the agency of LIFT Community Action Agency, Inc., the 14th day of May, 2024

Board Chairman



209 North 4th Street - Hugo, OK 74743
www.liftca.org
Telephone: 580.326.3351 | Fax: 580.326.2305
TTD/TTY - 711

This institution is an equal opportunity employer



2023 -2028 Strategic Plan

Goal #1 – Update Outdoor Learning Experiences

Objective #1 – Assess all HS/EHS/EHS-CC outdoor learning environments.

Objective #2 – Research options for funding outdoor learning improvements.

Objective #3- The formal bid process will be employed to secure a company to complete the outdoor learning updates.

Objective #4 – Renovations will begin on the most needed outdoor learning environments.

Objective#5 – Evaluations will begin on funding for remaining updates to outdoor learning environments.

Objective #6 – Final renovations will be completed for all needed updates to outdoor learning environments.

OUTCOME Year #1 – The program will have secured partial funding to begin updates to the outdoor learning environments.

OUTCOME Year #2 – The program will have begun renovations on the top needed outdoor learning environments.

OUTCOME Year #3 - The program will have finished renovations on the top needed outdoor learning environments & begun to explore funding for any further updates to remaining outdoor learning environments entitled phase 2.

OUTCOME Year #4 – The program will have begun any final renovations on the updates to the remaining phase 2 outdoor learning environments.

OUTCOME Year #5 – The program will have finished or made significant advances toward the remaining renovations for the phase 2 outdoor learning environments.

Measurement Tool: Facility checks and Site Visits

IMPACT: Children will have an improved outdoor learning environment, thus increasing the impact on the early childhood experience while in Head Start/Early Head Start/Early Head Start-Child Care.

Goal #2- Program will work toward full enrollment in all 3 program options.

Objective #1 – The program will evaluate which locations have suffered the most with under enrollment.

Objective #2 – The program will submit a change of scope for the Head Start/Early Head Start program.

Objective #3- The program will broaden parameters around the Early Head Start-Child Care scholarship requirements, to assist families with the burden of time restraints from the State Child Care Subsidy department.

Objective #4 – The program will submit a change of scope for the Early Head Start-Child Care program to address recurring dynamics with child care partners.

OUTCOME Year #1 – Program will have evaluated areas that have suffered the most with under enrollment and will have submitted the change of scope for the Head Start/Early Head Start grant.

OUTCOME Year #2 – Program will have broadened the parameters for the awarding of the EHS-CC scholarships.

OUTCOME Year #3 - Program will have submitted a change of scope for the EHS-CC program.

OUTCOME Year #4 – Program will implement changes approved by the change in scopes for all 3 program options.

OUTCOME Year #5 – Program will sustain recruitment efforts and funded enrollment.

Measurement Tool: ERSEA Tracking & Program Planning Meetings

IMPACT: The program will have stabilized enrollment.

Goal #3- Program will prioritize strengthening resources surrounding behavior needs as well as social emotion needs of children.

Objective #1 – Increase trainings on Conscious Discipline.

Objective #2 – Refine case meeting process.

Objective #3- Include teaching staff as appropriate in case meetings.

Objective #4 – Incorporate calming centers at each location.

Objective #5 – Increase meetings with parents when children are experiencing a higher need within perceived challenging behaviors and or social emotional needs.

OUTCOME Year #1 – The training plan will include Conscious Discipline trainings and or correlational trainings to address perceived challenging behaviors and or social emotional needs.

OUTCOME Year #2 – The case meetings will have a more impactful streamlined process.

OUTCOME Year #3 - Teaching staff will have a higher inclusion rate for case meetings.

OUTCOME Year #4 – An increased percentage of centers that have incorporated calming centers into the environments.

OUTCOME Year #5 – Regular instances of involving parents/guardians in meetings that will support children with perceived challenging behaviors and or social emotional needs.

Measurement Tool: Training Plans, Child Outcomes Data, Case Notes

IMPACT: Children, families, and staff are better equipped to handle perceived challenging behavior and social emotional needs.

Goal #4 – Strategically make movements toward strengthening staff wellness techniques and or policies.

Objective #1 – Increase opportunities to have team building activities.

Objective #2 – Utilized staff wellness committee comprised of current staff.

Objective #3 – Begin to implement the philosophy of “Approachable Leadership” amongst management team.

Objective #4 – Pursue any opportunities to continue incentive programs.

OUTCOME Year #1 – Program will have added team building activities to staff meetings and in-service trainings.

OUTCOME Year #2 – Staff wellness committee will have scheduled regular meetings.

OUTCOME Year #3 – Program will have begun implementation of “Approachable Leadership” philosophy amongst management team.

OUTCOME Year #4 – Program leadership will have pursued any funding opportunities to continue incentive programs.

Measurement Tool: Anecdotal data, staff surveys

IMPACT: An increase in staff satisfaction, thus a positive increase in classroom experiences for children and families.



ADMINISTRATION FOR
CHILDREN & FAMILIES

Office of Head Start | 330 C St., SW, 4th Floor, Washington DC 20201 | eclkc.ohs.acf.hhs.gov

April 27, 2024

Grant No. 06CH012393

Dear Head Start Grant Recipient,

The Further Consolidated Appropriations Act, 2024, contains an increase for Head Start of \$275 million over the Fiscal Year (FY) 2023 level for a cost-of-living adjustment (COLA). The COLA supports a 2.35 percent adjustment above FY 2023 funding levels to increase the pay scales of Head Start and Early Head Start staff, including vacant positions, and delegate agency or other partners providing direct services.

The following table reflects the COLA increase(s) available for FY 2024.

Funding Type	Head Start	Early Head Start
Cost-of-Living Adjustment (COLA)	\$81,564	\$23,027
Total Funding		\$104,591

Please note, this permanent increase is effective at the start of the FY 2024 budget period and is retroactive if this period has already commenced. Applicable to recipients operating both a Head Start and Early Head Start program, allocations for each program **must** be applied accordingly.

Application Submission Requirements/Notice of Award (NoA)

Recipients that have already submitted a FY 2024 non-competing new (NCN) or non-competing continuation (NCC) application **are not** required to submit a COLA supplemental request. Each recipient will receive a Notice of Award for an amount proportionate to the COLA increase appropriated by Congress. The table above reflects the increase(s) added to your FY 2024 base levels.

Recipients that have not yet submitted their FY 2024 NCN or NCC application must include their COLA allocation in the annual application.

For additional information on the allowable uses of COLA funding, refer to Program Instruction ACF-OHS-PI-24-02.

Required Use of COLA Funds



ADMINISTRATION FOR
CHILDREN & FAMILIES

Office of Head Start | 330 C St., SW, 4th Floor, Washington DC 20201 | eclkc.ohs.acf.hhs.gov

April 27, 2024

Grant No. 06HP000312

Dear Head Start Grant Recipient,

The Further Consolidated Appropriations Act, 2024, contains an increase for Head Start of \$275 million over the Fiscal Year (FY) 2023 level for a cost-of-living adjustment (COLA). The COLA supports a 2.35 percent adjustment above FY 2023 funding levels to increase the pay scales of Head Start and Early Head Start staff, including vacant positions, and delegate agency or other partners providing direct services.

The following table reflects the COLA increase(s) available for FY 2024.

Funding Type	Early Head Start
Cost-of-Living Adjustment (COLA)	\$51,086
Total Funding	\$51,086

Please note, this permanent increase is effective at the start of the FY 2024 budget period and is retroactive if this period has already commenced. Applicable to recipients operating both a Head Start and Early Head Start program, allocations for each program **must** be applied accordingly.

Application Submission Requirements/Notice of Award (NoA)

Recipients that have already submitted a FY 2024 non-competing new (NCN) or non-competing continuation (NCC) application **are not** required to submit a COLA supplemental request. Each recipient will receive a Notice of Award for an amount proportionate to the COLA increase appropriated by Congress. The table above reflects the increase(s) added to your FY 2024 base levels.

Recipients that have not yet submitted their FY 2024 NCN or NCC application must include their COLA allocation in the annual application.

For additional information on the allowable uses of COLA funding, refer to Program Instruction ACF-OHS-PI-24-02.

Required Use of COLA Funds

Recipients are required to ensure COLA funds are applied as follows:

- A permanent increase to the pay scale of no less than the required 2.35 percent adjustment for each Head Start/Early Head Start (including EHS-CCP) position, including current employees and unfilled vacancies subject to the provisions of Sections 653 and 640(j) of the Head Start Act;
- The provision of a no less than 2.35 percent increase to all delegate agencies and partners providing direct services;
- Ensure increases are applied retroactively to the start of the FY 2024 budget period including distributing funds to affected employees, if applicable;
- Any remaining amount following the required 2.35 percent increase to the Head Start pay scale, and delegate agencies and partners, may be applied to fringe benefits, and other costs necessary to operate the program.

Recipients must maintain documentation to justify applying differential COLA adjustments to pay scales and/or to delegate agencies and partners.

Other Uses or Declination of COLA Funds

Recipients planning to use COLA funds for any purpose other than as required above, must submit a budget revision amendment for consideration in the Head Start Enterprise System (HSES) no later than thirty (30) days from the issuance date of the Notice of Award.

If any portion of the funding identified above will not be needed, a statement regarding this decision must be submitted through HSES Correspondence no later than thirty (30) days from the issuance date of the Notice of Award. The subject line of the HSES Correspondence should read –“[recipient grant number] [recipient name] –declination of [all or portion] COLA funds”. Please note, this declination must be signed by the Board Chair. As a reminder, these funds are permanent increases to the Head Start and Early Head Start base funding levels. A declination of any portion of the funds may impact budgets for subsequent years.

Non-Federal Match

The requirements of Sec. 640(b) of the Head Start Act are applicable to COLA funding increases. Any previously approved non-federal match waivers for a recipient's FY 2024 budget period will apply to the entire budget, including COLA. The non-federal match requirement will be reduced proportionally.

Program Improvement (One-Time) Requests

Recipients encountering program improvement needs that cannot be supported by the agency budgets or other resources are invited to apply for one-time funding. This funding must be applied for through the appropriate supplemental amendment type in HSES. Program Improvement requests generally include, but are not limited to, facility projects (construction, purchase, or major renovations requiring 1303 applications or minor repairs and enhancements). Requests are prioritized and funded based on funding availability and may require additional time before a final decision is made. For questions regarding program improvement needs and requests, please contact your regional office.

For any questions or assistance, please contact Kobena Arthur, Head Start Program Specialist, at 214-767-8859 or kobena.arthur@acf.hhs.gov or Tiffany Sowels, Grants Management Specialist, at 214-767-8018 or Tiffany.Sowels@acf.hhs.gov.

Sincerely,

The Office of Head Start

History of LIFT Community Action Agency, Inc.

In 1964, three separate Community Action Agencies existed in Choctaw, Pushmataha, and McCurtain Counties of Southeast Oklahoma. Research dating back to the reference period reveals that the following Office of Economic Opportunity (OEO) programs were operated by those CAAs: Administration, Emergency Food and Medical, Neighborhood Centers, and Summer and Full Year Head Start programs.

In 1968, these agencies merged in order to better meet the needs of the residents of southeast Oklahoma. The Board of Directors drafted Articles of Incorporation and By-laws for the newly founded “Little Dixie Community Action Agency, Inc.” which included the entirety of all three counties, an area covering more than 4,000 square miles. Southeast Oklahoma, with its mountainous landscape and high precipitation is significantly different from other areas of Oklahoma and other Great Plains States. Climate conditions are more aligned with those in the Deep South States which was the rationale behind the selection of the name “Little Dixie” for the new Community Action Agency.

Little Dixie Community Action Agency, Inc. was incorporated as a Nonprofit Organization on April 4, 1968. The agency’s purpose as stated in its original Articles of Incorporation was “To assist in developing, executing, and coordinating plans and the programs authorized under the Economic Opportunity Act of 1964 and subsequent amendments which may be made to that act, and other Federal, State, and Local laws and programs which will tend to alleviate and eradicate poverty within the area of operation of this agency, exclusively for charitable purposes.”

Fred Tucker was the first Executive Director for Little Dixie CAA and Gail Landreth was the first bookkeeper. These two individuals represented the agency’s entire administrative staff in 1968. Tucker served as executive director for 25 years until his death in 1993. His service to Community Action is honored each year when the Oklahoma Association of Community Action Agencies bestows the Fred Tucker Award for Excellence and Longevity among the State’s Community Action Employees. The agency has had only four additional Executive Directors since Mr. Tucker, which include:

- Bob Yandell (1993-2005)
- Randall Erwin (2005-2008)
- Brenda Needham (2008-2014)
- Rebecca Reynolds (2014 to present).

Throughout its history, Little Dixie CAA has progressively grown, adding new programs and services to meet the needs of the area, especially its most vulnerable populations. In 1971, Little Dixie CAA had an annual budget of \$607,583. Today, the agency’s current budget is close to \$24 million. While the organization has continued to grow and serve individuals in and outside of Oklahoma’s borders, the agency’s former name held less relevance in representing its geographical location.

In early 2019, the agency initiated a re-branding process. The decision to re-brand was a long time in the making, and the product of numerous conversations with agency funders, employees and stakeholders. The agency conducted an extensive review that included internal and external research, as well as engagement of the Board of Directors and staff (via a Re-Branding Committee) to help develop a clearer and more compelling brand architecture/narrative. Part of this long process involved working to identify a new agency name to further strengthen the re-brand. This decision was not taken lightly, as a name can serve as an organization’s blueprint—a foremost element used for judging its character and attributes. LIFT (which stands for “Lifting Individuals for Tomorrow”) was chosen because lifting others up is a core function of the agency. On August 10, 2021, the Board of Directors approved a Resolution to change the agency’s name, and the Amended Not for Profit Certificate of Incorporation for LIFT CAA was approved and filed by the Oklahoma Secretary of State on August 25, 2021. The Board of Directors, agency staffing, facilities, program services, resources provided, and partners all remained the same. In essence, LIFT CAA is the same agency—only with a new name. The new brand is reflective of the agency’s desire to inspire the communities served while encouraging upward mobility.

LIFT Community Action Agency, Inc.

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

Vision: “To free generations of people from poverty.”

Our Core Values Drive Our CHOICES. As an agency, we work to help others as they make choices to improve their quality of life and to determine their destiny for the future.

Compassion: Concern and empathy for others is at the very heart of what we do and why we exist. We focus on achieving the greatest well-being and the highest potential for all of our stakeholders. We value respect, human dignity, and doing the right thing for the right reason. We care for the needs and values of others.

Honesty: We connect with one another and our stakeholders with transparency, dignity and respect. We inspire trust by taking responsibility, and by doing what is right, fair, and ethical. To be truly successful, we must always be open and honest with our stakeholders, partners, and employees.

Optimism: We represent ourselves and the agency in a positive and professional manner at all times. We are considerate of others and maintain an affirmative attitude to ensure great results. We provide our stakeholders with hope and confidence about the future and its outcomes.

Integrity: We treat stakeholders, partners, and fellow employees with respect and kindness. We are thoughtful and decisive in leadership, accountable for our actions, and above all, driven to do the right thing. We encourage and reward teamwork, and strive for professional excellence to the highest standard possible. We model honesty and trust in all we do.

Community: We have a passion for making our communities a better place. We meet our mission and improve as an agency through engagement with others. We are committed to cultural diversity, mutual respect among all persons, compassion for others, honest and open communication, and fairness and integrity in all that we do. Community support enables us to constructively enlist the collaborative support of volunteers and other entities, creating the capacity to meet area needs.

Empowerment: We work to help others realize and achieve their full potential. We work to promote greater equality of opportunity for all persons, regardless of race, religion, gender, or social position by developing programs that emphasize the needs and aspiration of those who are most disadvantaged. We provide the framework and resources to succeed, and strive to exceed the expectations of our stakeholders by anticipating, understanding, and responding appropriately to their needs. We respect all individuals and value their contributions. We treat our stakeholders, partners and employees in a fair, equitable and non-discriminatory manner, recognizing the importance of diversity.

Stewardship: We are committed stewards of the human, fiscal and physical resources entrusted to us. We are accountable to one another for the quality of our communities, the strength of our finances, and the utility and provision of our services for community engagement and individual growth. We champion the needs and concerns of our stakeholders. We act in the best interest of others to deliver superior services and enrich each life we touch.

History of Community Action

Creation: 1964

After the assassination of President Kennedy in 1963, President Johnson expanded the policy ideas initiated in the Kennedy Administration. In his message to Congress on January 8, 1964, President Johnson said “Let us carry forward the plans and programs of John Kennedy, not because of our sorrow or sympathy, but because they are right...This Administration today, here and now declares and unconditional War on Poverty in America...Our joint Federal-local effort must pursue poverty, pursue it wherever it exists.”

The “War on Poverty” was born. In February, Sargent Shriver was asked to head a task force to draft legislation. In August, the Economic Opportunity Act of 1964 (EOA) was passed, creating a federal Office of Economic Opportunity (OEO) placed in the President’s Executive Office. Sargent Shriver was named Director, serving until 1969. Congress also passed the Civil Rights Act of 1964, guaranteeing equal opportunity for all. The Economic Opportunity Act, designed to implement that guarantee in the economic sector, stated in part: “It is therefore the policy of the U.S. to eliminate the paradox of poverty in the midst of plenty in this nation by opening, to everyone the opportunity for education and training, the opportunity to work, and the opportunity to live in decency and dignity.”

The EOA included new education, employment and training, and work-experience programs such as the Job Corps, the Neighborhood Youth Corps, and Volunteers in Service to America (VISTA, the “domestic Peace Corps”). Congress bypassed the state and local governments and provided for direct funding of community groups: the community action concept.

Formative Years: 1964 – 1967

The federal Office of Economic Opportunity (OEO) was to lead the efforts of the War on Poverty and coordinate related programs of all other federal agencies. So-called Community Action Agencies (CAAs) were created at the local level to fight the War on Poverty “at home”.

The EOA also provided for the creation of economic opportunity offices at the state level in order to involve governors in the War on Poverty. While governors were not authorized to give prior approval on OEO Grants, they did retain the right to veto any they thought inappropriate. Many, especially those in the South, exercised this right, only to be checked by another EOA provision for override by the Director of OEO. Indeed, Shriver overrode virtually all vetoes.

CAAs varied from grass-roots, community-controlled groups to those with experienced board members and a highly visible professional staff. Most were incorporated as private nonprofit organizations. A few were city agencies.

Funds were provided through the OEO. The local CAAs determined the use of the funds to meet the problems of the poor as they defined them. These were called “local initiative funds” and were used for a variety of purposes. One provision of the EOA called for the poor to have “maximum feasible participation” in identifying problems and in developing solutions. Across the nation, CAAs opened neighborhood centers in storefronts, housing projects, and other buildings in low-income areas to identify people who needed help and to determine eligibility.

A new group of community leaders developed out of these neighborhood organizations, voicing the concerns of the poor and insisting on change. The philosophy, the strength, and the personal commitments of community action were formed during this period. It was also during this phase that

EOA hired 3,000 new federal employees to manage and monitor all the new programs. Most of these came from the CAAs, civil rights groups, churches, labor unions, and other activist organizations.

The community action program grew rapidly and poured large amounts of federal funds into communities, leaving some local elected officials over the control of CAA boards. Unhappy with new power blocks outside their own political organizations, a few big-city mayors communicated their concerns to Congress and President Johnson. As a result, Congress began to earmark new funds into Congressionally defined National Emphasis Programs that reduced the ability of CAAs to use the funds for other purposes.

Restructuring Phase: 1967 – 1968

In late 1967, Congress passed the Green Amendment, which required that a CAA must be designated as the official CAA for that area by local elected officials in order to operate in that community. After designation, OEO could then recognize the CAA and provide funds. After months of negotiations, over 95 percent of the existing CAAs were designated. In several large cities, the CAA was taken over by the mayor and turned into a public agency. Congress also passed the Quire Amendment, which required that CAA boards of directors be composed of one-third elected officials appointed by them, at least one third low-income representatives selected by a democratic process, and the balance from the private sector. By 1968, there were 1,600 CAAs covering 2,300 of the nation's 3,300 counties. OEO also required many small, single-county CAAs to join together into multi-county units. By 1969, about 1,000 CAAs had been reorganized to meet the Quire Amendment criteria, and consolidated in accordance with OEO policy. Almost all of these CAAs are in existence today and operate the programs.

These amendments had a positive effect on most CAA boards, though the issue of increasing the influence of local elected officials on the board of directors was a significant issue to leaders of poverty groups which had been operating independently. The formal connection of political, economic, and community power structures proved to be a tremendous strength. In many places, CAA boards became the arena for local officials, business sector, and the poor to reach agreement on policies, self-help activities, and programs to help the poor in their community.

Transition Years: 1969 – 1974

By 1960, many successful self-help programs had been initiated by OEO and the community action agencies, including Head Start, Family Planning, Community Health Centers, Legal Services, VISTA, Foster Grandparents, Economic Development, Neighborhood Centers, Summer Youth Programs, Adult Basic Education, Senior Centers, Congregate Meal Preparation, and others. Picking up on the concept of using OEO and CAAs as "innovators and the testing ground" for new programs, and spinning off successful programs to be administered by other federal agencies, President Nixon's Administration saw the transfer of several large programs from OEO to the Department of Health, Education and Welfare and Department of Labor. Along with this went administrative oversight responsibility for a substantial part of CAA funding.

At the start of his second term in 1973, Nixon did not request any funds for OEO's Community Action Program division. Congress nevertheless provided funds. Nixon appointed Howard Phillips as Director of OEO and told him to dismantle and close the agency, and not to spend the money Congress provided. After a series of lawsuits, the Federal District Court in Washington D.C. ruled that the President could not refuse to spend funds that had been appropriated by Congress. Phillips resigned without having been confirmed by the Senate.

Program Management Years 1974 – 1981

Under President Ford, in 1974, the Community Services Amendments were passed. OEO was dismantled and a “new” Community Services Administration (CSA) replaced it. The employees remained and continued to administer the programs. Community Action had found a new home in the federal government. From 1974 to 1981, CSA continued to fund CAAs. CAAs continued to help communities and neighborhoods to initiate self-help projects such as gardening, solar greenhouses, and housing rehabilitation. They additionally helped create and support federally funded senior centers and congregate meal sites. Home weatherization and energy crisis programs were initiated in the 1970s.

In the late 1970s, under prodding from Congress, the Administration of President Carter initiated a large-scale effort to strengthen the role and management systems of both CSA and the CAAs. This resurgence of local spirit and leadership came to a quick end with passage of the Omnibus Budget and Reconciliation Act of 1981.

In September 1981, Congress provided that all CAAs designated and recognized by CSA were eligible to be funded under the 90 percent pass-through requirement of the Community Services Block Grant. Congress also rescinded the EOA and the Green Amendment, eliminating the procedures and regulations for designation and recognition of CAAs.

Block Grant Years: 1981 – Present

President Reagan’s Administration began a strong movement to reduce substantially the federal government’s support for domestic social programs. They proposed to consolidate most federally funded human needs programs into several large, general purpose block grants; to reduce the total amount of funding by 25 percent; and to delegate the responsibility for administering these block grants to the state.

The proposal was partially successful. Congress created eight new block grants consolidating over 200 federal programs, reduced the core funding, and turned administrative authority over to the states. However, it did not accept the elimination of federal funding for CAAs.

On Sept. 30, 1981, the CSA was abolished and the Economic Opportunity Act was rescinded. Approximately 1,000 CSA staff were fired. The Community Services Block Grant ensured the continued funding of the “eligible entities”; i.e., the CAAs, migrant programs and certain other organizations that had been financed through local initiative funds by CSA. Even with reduced core funding, CAAs have been able to leverage additional funds. One survey showed that with a CSBG budget over \$300,000, the average community action agency was able to leverage more than \$2.9 million, a ratio of \$9.50 for every dollar of core funding. Agencies also recruited an average of eight volunteers for every paid staff person.

Budget cuts in poverty programs continue, but CAAs still provide a “hand up, not a hand out”. The philosophy of eliminating “the paradox of poverty in the midst of plenty” remains the key concept that motivates CAAs today.

***Adapted from the paper written by Jim Masters and originally published for the 25th Anniversary of Community Action in 1989.*



Community Action Agencies are nonprofit private and public organizations established under the Economic Opportunity Act of 1964 to fight America's War on Poverty. Community Action Agencies help people to help themselves in achieving self-sufficiency. Today there are approximately 1,000 Community Action Agencies, serving the poor in every state as well as Puerto Rico and the Trust Territories.

Community Action Agencies across America

The service areas of Community Action Agencies (CAAs) cover 96 percent of the nation's counties. Our agencies are connected by a national network that includes the Community Action Partnership national association, regional associations, state associations, a national lobbying organization, and a national association of Community Service Block Grant administrators.

CAAs are a primary source of direct support for the more than 34.5 million people who live in poverty in the United States. The majority of CAA program participants are extremely poor, with incomes below 75 percent of the federal poverty threshold, or \$9,735 for a family of three (the average family size for the client population).

The Community Action network serves more than:

- 16.2 million individuals per year
- 3 million families per year.

CAAs serve all regions and populations:

- 54% of CAAs serve rural areas.
- 36% of CAAs serve areas considered both urban and rural.
- 10% of CAAs serve urban areas.

The average population a CAA serves is approximately 300,000 people. The average number of low-income people within each service area is 37,600.

Board, Staff, and Volunteers

CAA Boards of Directors have a unique composition of:

- at least one-third members from the low-income community
- exactly one-third public officials
- up to one-third members from the private sector
- the average size of a CAA board is: 25 people
- the typical size of agency staff is: 115 full-time equivalent workers
- on average, each CAA has: 813 people volunteering at the agency each year.

PUBLIC LAW 105–285—OCT. 27, 1998

TITLE II—COMMUNITY SERVICES BLOCK GRANT PROGRAM

SEC. 201. REAUTHORIZATION.

The Community Services Block Grant Act (42 U.S.C. 9901 et seq.) is amended to read as follows:

Community
Services Block
Grant Act.

“Subtitle B—Community Services Block Grant Program

42 USC 9901
note.

“SEC. 671. SHORT TITLE.

“This subtitle may be cited as the ‘Community Services Block Grant Act’.

42 USC 9901.

“SEC. 672. PURPOSES AND GOALS.

“The purposes of this subtitle are—

“(1) to provide assistance to States and local communities, working through a network of community action agencies and other neighborhood-based organizations, for the reduction of poverty, the revitalization of low-income communities, and the empowerment of low-income families and individuals in rural and urban areas to become fully self-sufficient (particularly families who are attempting to transition off a State program carried out under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.)); and

“(2) to accomplish the goals described in paragraph (1) through—

“(A) the strengthening of community capabilities for planning and coordinating the use of a broad range of Federal, State, local, and other assistance (including private resources) related to the elimination of poverty, so that this assistance can be used in a manner responsive to local needs and conditions;

“(B) the organization of a range of services related to the needs of low-income families and individuals, so that these services may have a measurable and potentially major impact on the causes of poverty in the community and may help the families and individuals to achieve self-sufficiency;

“(C) the greater use of innovative and effective community-based approaches to attacking the causes and effects of poverty and of community breakdown;

“(D) the maximum participation of residents of the low-income communities and members of the groups served by programs assisted through the block grants made under this subtitle to empower such residents and members to respond to the unique problems and needs within their communities; and

“(E) the broadening of the resource base of programs directed to the elimination of poverty so as to secure a more active role in the provision of services for—

“(i) private, religious, charitable, and neighborhood-based organizations; and

“(ii) individual citizens, and business, labor, and professional groups, who are able to influence the quantity and quality of opportunities and services for the poor.

2014 Oklahoma Statutes

Title 74. State Government

§74-5040. Purpose and activities of community action agency.

A. A community action agency shall serve as a primary advocate for the reduction of the causes, conditions and effects of poverty and shall provide social and economic opportunities that foster self-sufficiency for low-income persons. Any service provided by a community action agency through the Community Services Block Grant opportunity shall be made available to all eligible persons within the community action agency's service area. The activities of a community action agency shall, subject to rules and regulations promulgated by the Oklahoma Department of Commerce, include but not be limited to the following:

1. Informing state and local governments, private agencies and organizations, and citizens of the nature and extent of poverty within the service area;
2. Developing, administering, and operating community social and economic programs to reduce poverty within the entire area;
3. Providing and advocating for training and technical assistance to the poor and other residents within the service area to better define human problems, improve services, and facilitate citizen participation;
4. Promoting interagency cooperation and coordination in providing services to low-income persons;
5. Entering into contracts with federal, state, and local public and private agencies and organizations as necessary to carry out the purposes of this act; and
6. Engaging in any other activity necessary to fulfill the intent of this section and Sections 5034 through 5039 of this title.

B. The Department of Commerce shall not execute a contract with a community action agency until the applicant submits, and the Department approves, a budget work program for expenditure of funds. Each contract shall require audits of expenditures, as provided in rules promulgated by the Department.

Added by Laws 1986, c. 207, § 46, operative July 1, 1986. Amended by Laws 2012, c. 301, § 1, eff. Nov. 1, 2012.

Req. 113 – Requirements for Boards of Directors

I - REQUIREMENTS FOR ALL PROGRAMS
REQUIREMENT NO. 113
REQUIREMENTS FOR BOARDS OF DIRECTORS

EFFECTIVE DATE:	SEPTEMBER 1, 2014
REVISED DATE:	January 1, 2022
REVIEW DATE:	October 2021

I. CONTRACTUAL REQUIREMENT

Subgrantee Recipients receiving funds under CSBG shall comply with the requirements for Boards of Directors specified in 675 (c) (3) of the CSBG Act, <http://codes.lp.findlaw.com/uscode/42/106> provisions of the contract and assurances provided by the Subgrantee Recipient.

II. PROCEDURES

The following standards shall be incorporated into the By-Laws of all Boards of Directors:

A. BOARD SIZE

Boards shall consist of no fewer than 12 nor more than 36 members. The Subgrantee Recipient's By-Laws should specify the number of Board Members.

B. COMPOSITION

Board composition must be one-third public sector, at least one-third representatives of the low-income community and the remainder composed of representatives of the private sector.

1. Public Sector: One-third of the members of the Board shall be elected public officials currently holding office or their representatives. If, however, the number of elected officials reasonably available and willing to serve is less than one-third of the membership, appointed public officials may be counted in meeting the one-third requirement.
 - a. The term "elected public official" refers to a duly elected representative of the State, a municipality, county, a tribal government or State political subdivision.
 - b. The term "appointed public official" refers to employees of public agencies and members of boards and commissions established under State and/or local law who have responsibility and authority to determine and implement the policies of those agencies, their boards or commissions.
 - c. An elected or appointed public official may designate another person to serve on

the Board as their representative provided the representative is entitled to act on behalf of the public official represented with regard to the business of the Board.

2. Low-Income Sector: At least one-third of the Board shall be a democratically selected representative of low-income persons residing in the service area.
3. Private Sector: The remainder of the members shall be officials or members of business, industry, labor, religious, welfare, education or other major groups and interests in the service area.

C. SELECTION PROCEDURE

The selection procedures must be in writing and documented to show Board involvement in the selection of the public and private sector members and the involvement of the low-income community in the selection of low-income members.

1. Alternates for the public, low-income and private sectors may be selected and may have voting privileges provided they are selected in the same manner as the Board member they alternate for. The Agency must have an established By-Law provision that allows alternates to vote in the absence of the regular member and to be counted as part of the quorum requirements.
2. Vacancies on the Board shall be filled in a manner consistent with the original election/selection process. Agencies are encouraged to fill all vacancies as soon as possible, preferably within two months. Alternates may fill the remainder of any term for the sector they were selected to represent.

D. COMMITTEES AND SUBCOMMITTEES

Committees and subcommittees may be established by the Board to accomplish the business of the Board and the Agency provided:

1. Actions of any committee are ratified by the Board
2. Standards regarding meeting and quorum requirements as stated later in this requirement (section H.2-7) apply to all Board subgroups; and
3. Decisions relating to the acceptance/denial of a specific applicant for weatherization services made by a duly composed Weatherization Policy Advisory Council need not be ratified by the Board except in instances of an applicant appeal that necessitates Board action.

E. TERMS OF SERVICE

Each term shall not exceed three years and each member must be removed at the end of each term. The member may be re-selected/appointed or a new member may be selected/appointed. This procedure must be in accordance with "Selection Procedures" previously stated. Limitations on the number of terms a member may serve shall be determined by the Board of Directors and must be in writing as part of the Agency's By- Laws.

F. REMOVAL OF MEMBERS

1. Public officials or their representatives must be removed from the Board when the public official no longer retains the designated office/position. An individual appointed by a body of public officials, such as a commission or council, shall be removed from the Board upon change in composition of the appointing body. The public sector representative may be reappointed, or a new representative may be appointed by the newly selected/elected public official(s).
2. The Board shall establish and include in its By-Laws the grounds and procedures for the removal of low-income and private sector representatives.

G. BOARD COMPENSATION

1. Unless compensated from another source, Board members may be reimbursed for travel costs incurred in attending Board or committee meetings.
2. Reimbursement for travel shall be in accordance with current travel provisions. H.

MEETING AND QUORUM REQUIREMENTS

1. The Board of Directors shall meet as often as the Agency or Board's business may require but not less than six (6) Board meetings shall be held within any 12-month period.
2. The required quorum shall be more than 50 percent of the current total membership of the Board.
3. In the absence of specific rules of order, Robert's Rules of Order shall apply.
<http://www.robertsrules.org/>
4. The Board shall provide its members with a notice of and the agenda for all meetings in advance of the meeting date.
5. The Board shall keep minutes for each meeting that include a sign-in sheet, record of votes by members on each motion and a record of absences, categorized as excused or unexcused.
6. Minutes of the previous meeting shall be distributed to all members before the next meeting

and shall be made available to the public upon request.

7. All Board meetings shall be in compliance with the Oklahoma Open Meeting Act, 25 O.S. §301, et seq., and 25 O.S. §§301-314, as revised.

<http://www.odl.state.ok.us/lawinfo/docs/2006-LibraryLaws-PartD.pdf>

I. CODE OF CONDUCT

A Code of Conduct shall be established to ensure the appropriate conduct by members of the Board. Such Code shall prohibit the promotion of or involvement in nepotism, conflict of interest and discriminatory practices.

J. POWERS, RESPONSIBILITIES AND ROLE OF THE BOARD

The Board is to be the governing policy-making entity of the Agency.

1. Powers and Responsibilities: The powers and responsibilities of the Board shall include but not be limited to:

- a. Appointing an Executive Director
- b. Evaluating the Executive Director annually
- c. Determining the rules of procedures for the Board
- d. Determining the policies under which the Board and agency shall operate
- e. Determining, within regulations and policies, the major fiscal, personnel and program policies
- f. Reviewing and approving all programs and expenditures
- g. Considering and approving all program proposals and budgets
- h. Enforcing compliance with all conditions on grants
- i. Determining overall program plans and priorities
- j. Determining the use of all discretionary money
- k. Compliance with the Oklahoma Open Meeting Act, 25 O.S. §301, et seq., and 25 O.S. §§301-314, as revised; <http://www.odl.state.ok.us/lawinfo/docs/2006-LibraryLaws-PartD.pdf>
- l. Compliance with the Code of Conduct
- m. Review the agency's mission statement at least every five years and ensure the mission addresses poverty and the agency's program and services are in alignment with the mission
- n. Ensure the agency's community action plan is outcome based, anti-poverty focused and ties directly to the Community Needs Assessment
- o. Ensure the agency has a written succession plan in place for the CEO/ED approved by the board that contains procedures for covering an emergency, unplanned short-term absence as well as the process for filling a permanent vacancy
- p. Review the agency's annual audit and address all findings

2. Role of the Board: The role of the Board shall include but not be limited to:
 - a. Being a catalyst for positive change in the community
 - b. Bringing the problems and needs of the community to the Board for discussion
 - c. Looking at options for solving some of the problems or fulfilling the needs of the community
 - d. Examining issues affecting the quality of life in the community
 - e. Raising money
 - f. Serving as an advocate for clients and being a catalyst for institutional change in institutions that serve them
 - g. Serving as a link between the Board of Directors and the people or groups represented
 - h. Serving as a good public relations advocate for the programs, projects and activities of the Agency
 - i. Recruiting volunteers and space for programs and activities; and
 - j. Mobilizing resources for the entire community.

K. LIMITATIONS OF THE BOARD

Individual Board members do not have the authority to direct, coerce or in any way influence the actions of the Agency staff.

L. BOARD TRAINING

1. Subgrantee Recipients receiving funds under CSBG shall develop and implement an annual Board Training Plan (using ODOC's required Board Training template) and submit with its CSBG Application for funding.
2. Subgrantee Recipients receiving funds under CSBG are responsible for ensuring its board members receive:
 - a. a structured orientation (*Organizational Standard 5.7*) within 6 months of being seated.
 - b. training on their duties and responsibilities every two years (*Organizational Standard 5.8*).
 - c. on-going training and development that is in alignment with IM 82.
 - d. training sessions for Board members must focus on skill building and the professional development of Board members. **Information sharing does not qualify as training.**
3. Subgrantee Recipients receiving funds under CSBG are responsible for assessing the on-going training needs of its board members. Suggested training topics include, but are not limited to:
 - a. ROMA and ROMA Application
 - b. CSBG Act & CSBG Framework
 - c. Community Needs Assessment
 - d. Community Action Plan

- e. Strategic Planning
- f. Program Evaluation
- g. Analyzing Data and Assessing Results (Outcomes)
- h. Agency-wide budgeting
- i. Financial Statements and Grant Reporting
- j. Financial Oversight & Determining Fiscal Health
- k. How to interpret an audit report
- l. CSBG Organizational Standards
- m. Board Recruitment and Retention
- n. Evaluating the Performance of the Executive Director & setting goals
- o. The Role of Board Minutes
- p. How Boards can evaluate their own board performance
- q. IM 82 Tripartite Boards
- r. Board Roles and Responsibilities
- s. Open Meeting Act

M. BOARD FILES

Selection documentation for Board files must be maintained in writing for each seated member and should contain a minimum of:

Public and Private:

1. A letter of request from the agency to the entity providing the Board member.
2. A letter from the entity to the agency providing the name of the chosen member.
3. A copy of agency Board minutes showing Board involvement in the selection of the member.

Low-Income:

1. A letter of request from the agency to the entity providing the Board Member.
2. Democratic selection documents such as a public posting, newspaper clippings, agenda, open meeting minutes, sign-in sheets, or ballots showing a democratic selection process.
3. A letter to the agency providing the name of the chosen member.

III. FORMS.

None

IV. Resources

ODOC's CAA Implementation Manual

https://okcommerce.gov/assets/files/grants/CAA_Contractor_Implementation_Manual.pdf

Office of Community Services' IM 82

<https://www.acf.hhs.gov/ocs/resource/im-no-82-tripartite-boards>

Community Action Agency Board Members TOOLKIT:

<https://www.centerforcommunityfutures.com/caa/board-members-toolkit>

CAPLAW Bylaws Toolkit, *Updated 2009*

<https://resources.capl原因.org/resources/bylaws-toolkit>

Resources from the Organizational Standards Center of Excellence (OSCOE):

http://bit.ly/OSCOEresources_GovernanceGuide

CSBG Organizational Standards Category 5 Board Governance Technical Assistance Guide:

[Organizational Standards Technical Assistance Guide – Category 5: Board Governance \(Public\) | National CAP \(communityactionpartnership.com\)](#)



OKLAHOMA
Commerce

CSBG CAA IMPLEMENTATION MANUAL UPDATES

FEBRUARY 8, 2022

CAA IMPLEMENTATION MANUAL UPDATES

IMPLEMENTATION MANUAL REQUIRED FOR CAAs:

- **CSBG Contractual Requirement (contract part II)**
- **CSBG RFA:** The Contractor shall maintain records and accounts, including property, personnel and financial records, that properly document and account for all project funds. Specific types and forms of records are required by ODOC's Contractor's Implementation Manual. The Manual is hereby annexed and incorporated and made a part of this contract. The manual may be amended during the current contract year by ODOC.
https://www.okcommerce.gov/assets/files/grants/CAA_Contractor_Implementation_Manual.pdf

CAA IMPLEMENTATION MANUAL UPDATES

REVISED Manual is effective January 01, 2022

UPDATES TO ALL REQUIREMENTS:

- Links were updated
- Grammatical and punctuation errors corrected
- Removed references to Weatherization Program and Weatherization Requirements
- Red-lettered version was emailed (to readily see changes)

CAA IMPLEMENTATION MANUAL UPDATES

Implementation Manual Revisions:

- | | |
|---------------------------------------|---|
| • Requirement 101, ROMA | • Requirement 117, Org Standards |
| • Requirement 108, Procurement | • Requirement 201, CSBG |
| • Requirement 110, T&TA | • Requirement 202, Monitoring (NEW) |
| • Requirement 113, Board of Directors | • Requirement 203, Corrective Action |
| • Requirement 114, CONFAX | • Requirement 204, Discretionary projects (NEW) |
| • Requirement 115, Budget Revisions | |

CAA IMPLEMENTATION MANUAL UPDATES

Requirement 101, ROMA

- Updated language to include ROMA Next Generation
- Added definitions
- Updated ROMA training requirements
- Updated national goals
- Omitted Form 16 for ROMA Training

CAA IMPLEMENTATION MANUAL UPDATES

Requirement 108, Procurement:

- Added vehicle procurement requirements
- Requires an analysis of need
- Requires a cost analysis
- Requires **prior written** authorization from ODOC
- Requires CAAs to have written vehicle usage procedures

CAA IMPLEMENTATION MANUAL UPDATES

Requirement 110, T&TA

- Added language to include:
 - virtual training
 - training outcomes and
 - reporting of training

CAA IMPLEMENTATION MANUAL UPDATES

Requirement 113, Board of Directors:

Added requirements for board training that include:

- Annual Board Training Plan
- CAAs are responsible for ensuring Board Members receive orientation and on-going training
- Training for Board members must focus on skill building and professional development of Board members. **Information sharing does not qualify as training**
- Includes a list of suggested training topics

CAA IMPLEMENTATION MANUAL UPDATES

Requirement 114, CONFAX:

- Now titled CONFAX/Document Submission
- Revised procedures for document submissions

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CAA IMPLEMENTATION MANUAL UPDATES

Requirement 115, Budget Revisions:

Updated requirement for justification for budget revisions:
Justification **must include a rationale for the change.**

Examples:

- **Justified rationale:** The agency received a new contract that funds one-half of our Outreach Coordinator's salary, which is currently funded on this contract. We would like to move \$20,000 currently budgeted for that position to fund a part-time clerk for our Accounting office.
- **Unjustified:** -\$1200 salary, -\$350 fringe, +\$600 supplies; +\$950 travel
- **Unjustified:** Add Data Entry Clerk to budget. Other revisions as needed

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CAA IMPLEMENTATION MANUAL UPDATES

Requirement 117, Org Standards:

- Clarified Contractual Requirements
- Updated Procedures and Corrective Actions
- Added links for Technical Assistance Guides for all 9 Categories

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CAA IMPLEMENTATION MANUAL UPDATES

Requirement 201, CSBG:

- Updated procedures to include CSBG Framework
- Updated procedures to include ROMA requirements

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CAA IMPLEMENTATION MANUAL UPDATES

Requirement 202, Monitoring:

NEW REQUIREMENT

- Includes contractual requirements
- Includes procedures for monitoring
- Includes procedures for addressing monitoring deficiencies

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CAA IMPLEMENTATION MANUAL UPDATES

Requirement 203, Corrective Action:

- Same policy that was implemented in 2017
- Updated contractual requirements
- Clarified procedures
- Detailed progressive corrective actions to address deficiencies and non-compliance with state & federal requirements

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CAA IMPLEMENTATION MANUAL UPDATES

Requirement 204, Discretionary Projects:

NEW REQUIREMENT

- Includes contractual requirements with types of discretionary activities that are included in the CSBG State Plan
- Procedures include eligible projects, timelines, funds distribution and monitoring of discretionary contracts

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CAA IMPLEMENTATION MANUAL UPDATES



CAA Implementation Manual:
<https://www.okcommerce.gov/community-development/community-action-agencies/community-services-block-grant-programs/>



17

LIFT Community Action Agency, Inc.

Policy and Procedure on Board Giving and Board Member Participation for Fundraising

POLICY:

As evidence of their commitment to the mission of LIFT Community Action Agency, Inc., members of the Board of Directors are asked to make an annual pledge for a personal financial gift to the organization. Financial support from the agency's Board of Directors equates to a Board that fully supports the mission and goals of the agency.

Additionally, the board as a whole is provided with opportunities to be active participants in fundraising efforts and other events that also align with the mission of the agency.

PROCEDURE:

1. A Board Giving Committee consisting of no less than three (3) members of LIFT CAA's governing board will be appointed.
2. All board members will be provided with a copy of this policy and asked to sign a statement reflecting their intent to make a monetary donation no less than once per year.
3. Agency staff will submit pledge cards to members requesting monetary contributions.
4. The Board Giving Committee will be provided with quarterly updates by LIFT staff regarding status of contributions.
5. Board Giving Committee will provide updates on status of contribution to the overall board no less than twice a year.
6. Staff will communicate to the members any/all opportunities to participate in other agency related fundraising and community events.

BOARD MAKE-UP:

LIFT Community Action Agency, Inc. meets with the Board Composition requirements to have a tri-partite Board with 1/3 representation for each of the three required community sectors: Private, Public, and Low-Income. LCAA covers a geographical area of more than 4,000 square miles which encompasses all of Choctaw, McCurtain and Pushmataha counties of Southeast Oklahoma. The Board of Directors includes 27 members which meet monthly. In addition, the Board has numerous committees which meet at various times throughout the year as necessary.

LIFT CAA's Board Make-up is governed by the Community Service Block Grant Act. 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.

- *Public: 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.

- *Private: 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”.

Board Member Pledge of Commitment

As a member of the Board of Directors of LIFT Community Action Agency, Inc., I am committed to promoting the mission of the organization. As tangible evidence of that commitment, I would like to make the following pledge to LIFT Community Action Agency, Inc. for the fiscal year _____:

In FY_____, I will make a concerted effort to contribute \$_____ towards the work and in support of LIFT Community Action Agency, Inc.

My pledge will be paid:

___ in monthly installments of \$_____.

___ in quarterly installments of \$_____.

___ in a one-time gift of \$_____.

I would like my pledge to be allocated as follows (select program(s)/service(s) that you want your contribution to be allocated to and the percentage for each):

- | | |
|--|---|
| 1. ___ % Head Start/EHS/EHS-CC Programs | 2. ___ % Early Learning Centers |
| 3. ___ % Court Appointed Special Advocates | 4. ___ % Retired & Senior Volunteer Program |
| 5. ___ % Mentoring | 6. ___ % YouthBuild |
| 7. ___ % Emergency Services | 8. ___ % Other (specify)_____ |

In addition to my financial gift, I have other contributions to make through my skills, time, services, and/or donation of goods. Please contact me regarding events, etc. Listed below are other in-kind contributions I am in a position to offer.

In-Kind Donations: I will contribute the following goods, services and/or volunteer hours:

Fundraising: I will participate in raising funds for the organization in one or more of the areas as follows:

- Making calls to donors to thank them for their giving.
- Planning/working at a fundraising event in coordination with agency staff.
- Visiting with potential donors to ask them for a financial gift.
- Raising community awareness about the need for local giving through advocating/support

Below is a list of Annual Fundraiser/Community Awareness Events and other opportunities for Board Member participation. Please indicate with a check in the boxes any/all in which you would like to participate.

☐ **National NeighborWorks Week** ☐ **Race Against Poverty 5K Walk/Run**

☐ **Annual RSVP Recognition Event** ☐ **National Community Action Month Event**

☐ **Community Improvement Events** ☐ **National Weatherization Day**

☐ **CASA Volunteer** ☐ **Annual Thanksgiving Food Drive**

☐ **HS/EHS/EHS-CC Volunteer** ☐ **Staff/Volunteer/Funder Recognition Events**

☐ **Mentor for Youth Programs** ☐ **RSVP Volunteer**

☐ **Other (List)**_____

Board Member Signature

Date

Contact Information:

Telephone:_____

Email:_____

Address:_____

LIFT Community Action Agency, Inc.
Board Member
Monetary Gift Commitment

I, _____, as a Member of the Board of Directors of LIFT Community Action Agency, Inc., am committed to promoting the Mission of the organization. As tangible evidence of that commitment, I hereby pledge to make a monetary donation, no less than annually, in support of the agency and its activities.

In addition to my financial gift, I am committed to contributing my skills, time and services.

Board Member Signature

Date

Fall- Winter 2023-2024

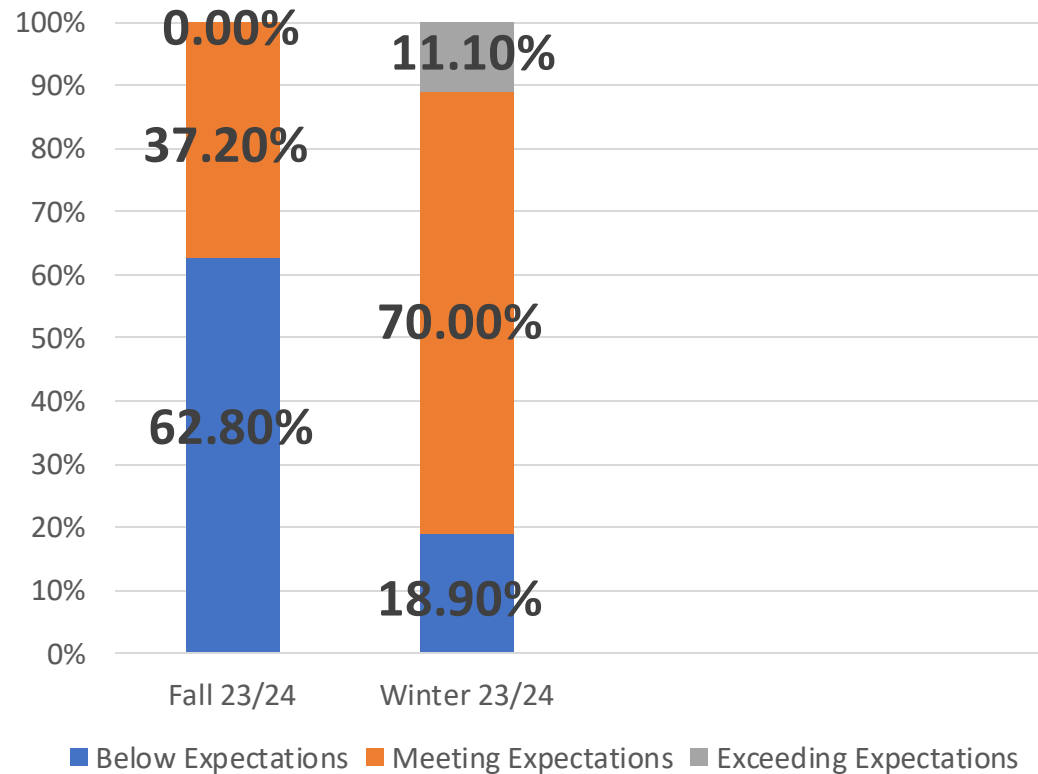
Widely Held Expectations

Head Start/Early Head Start/Early Head Start-
Child Care

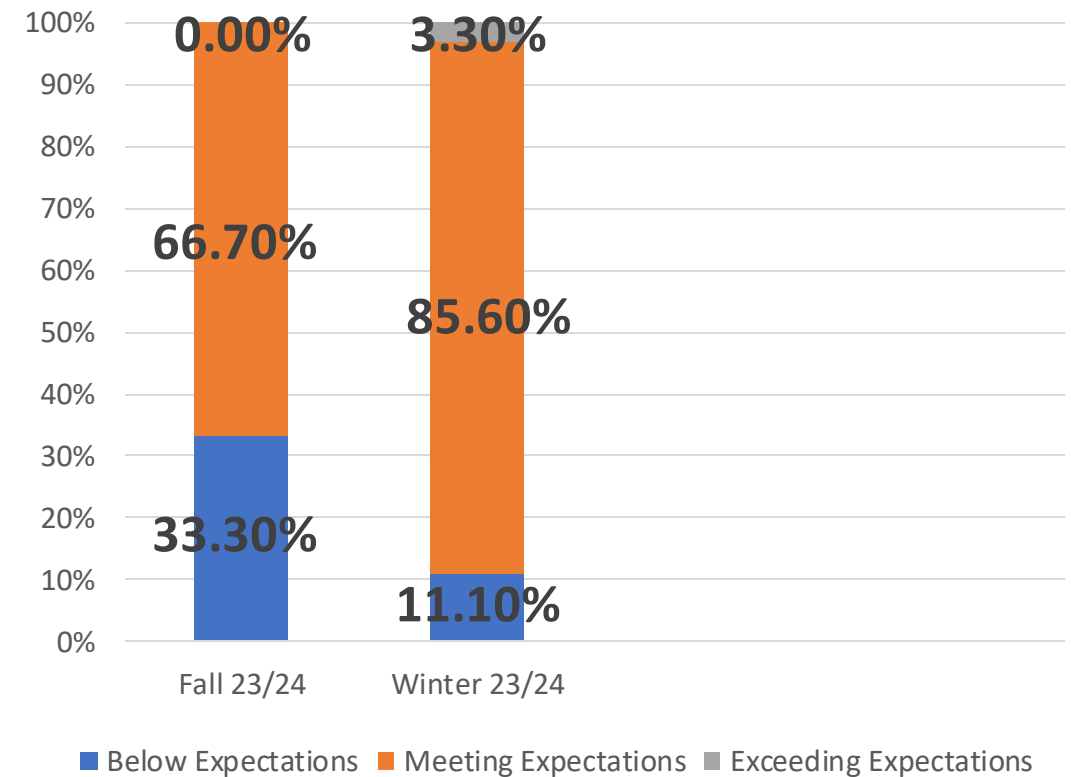
Head Start 4 year olds

Fall (78 children)/Winter (90 children)

Social-Emotional



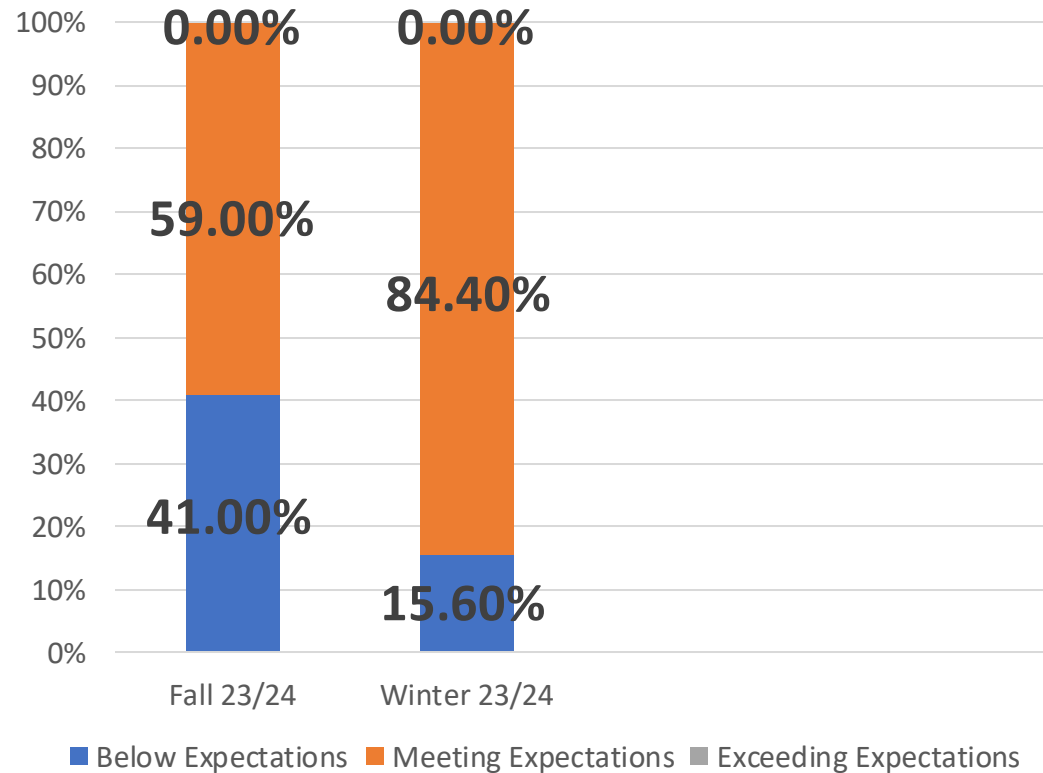
Physical



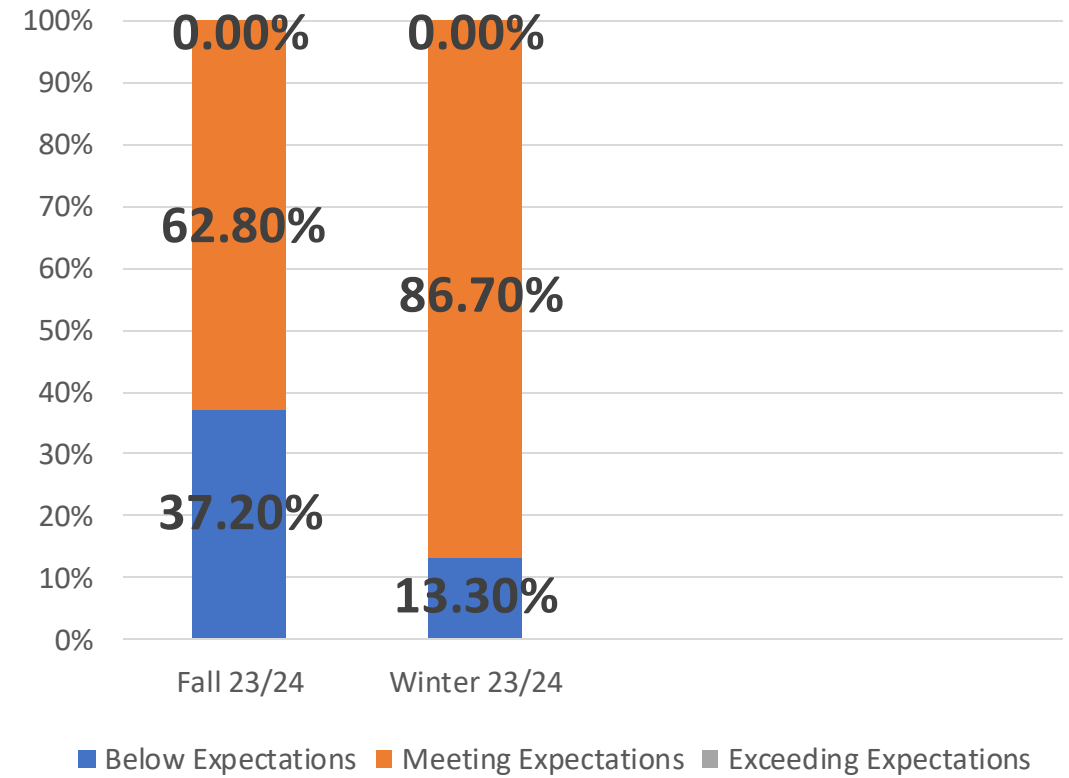
Head Start 4 year olds

Fall (78 children)/Winter (90 children)

Language



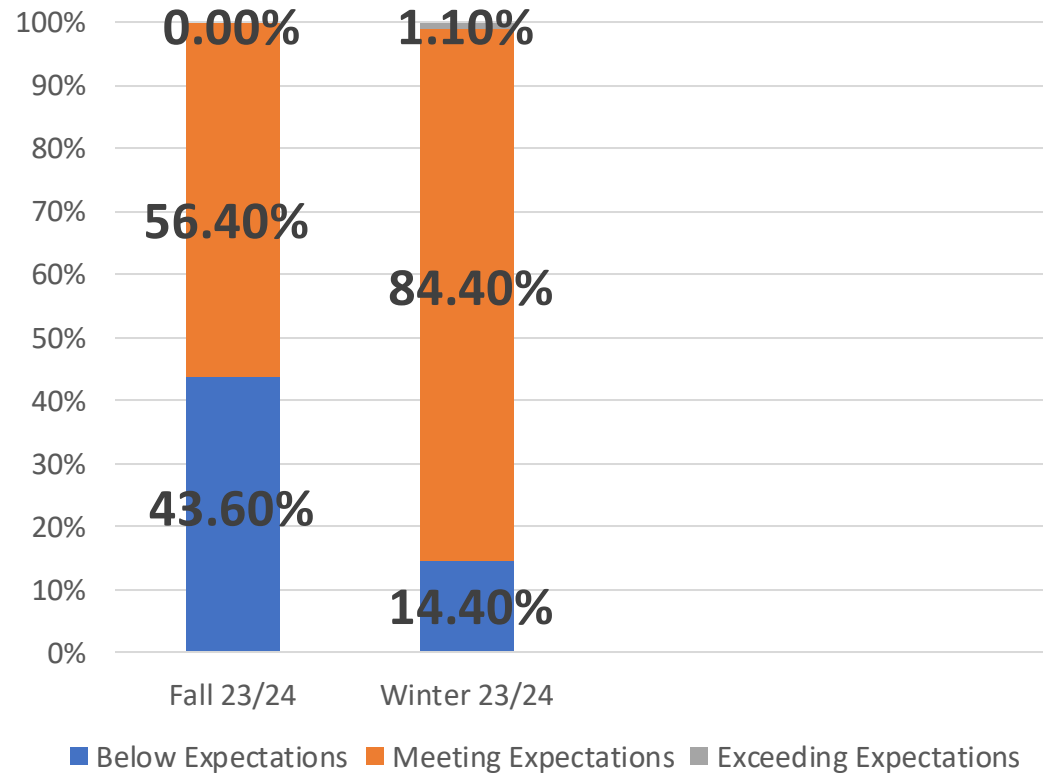
Cognitive



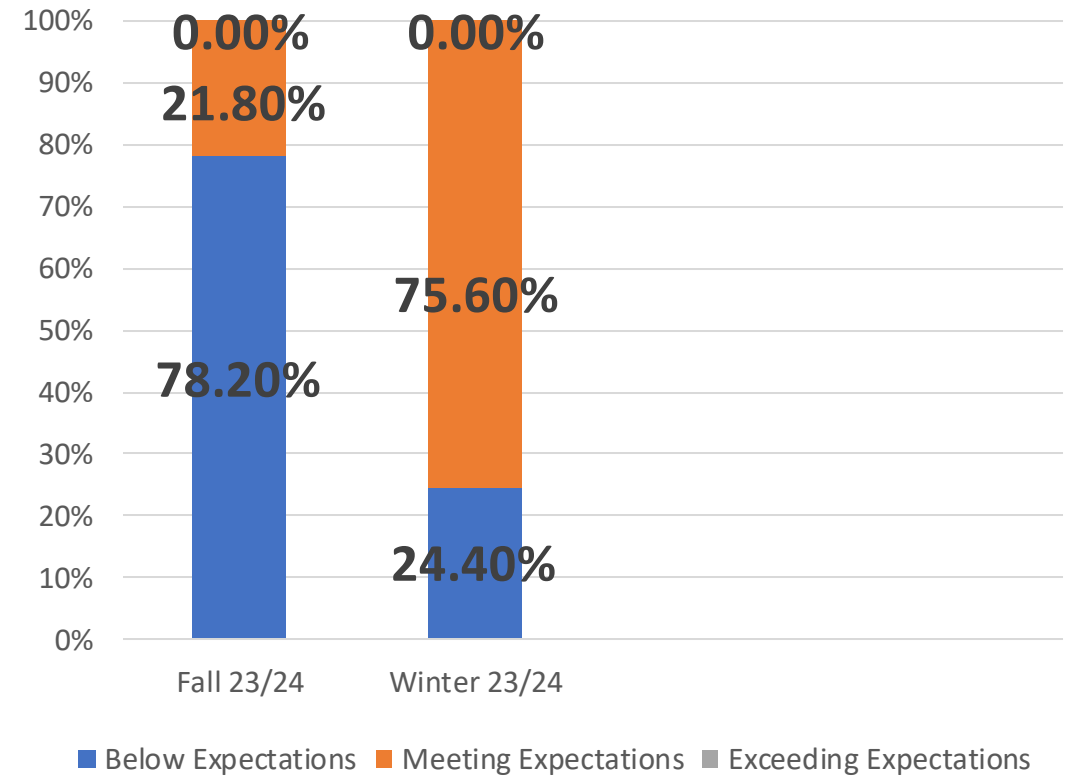
Head Start 4 year olds

Fall (78 children)/Winter (90 children)

Literacy



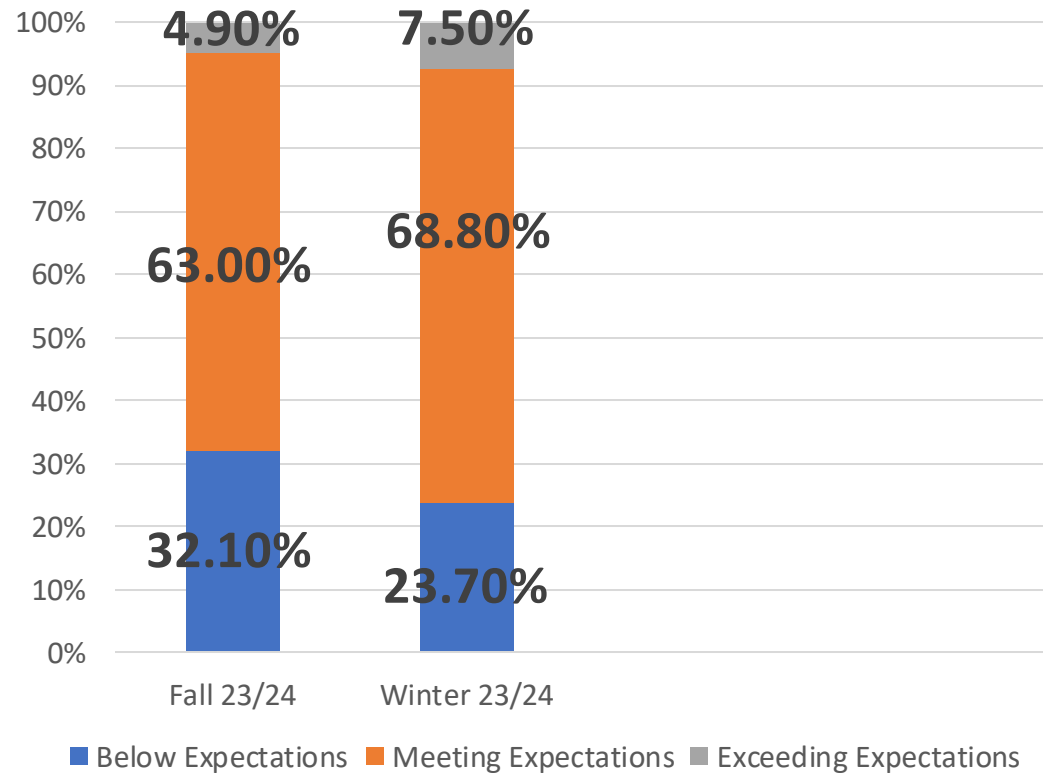
Math



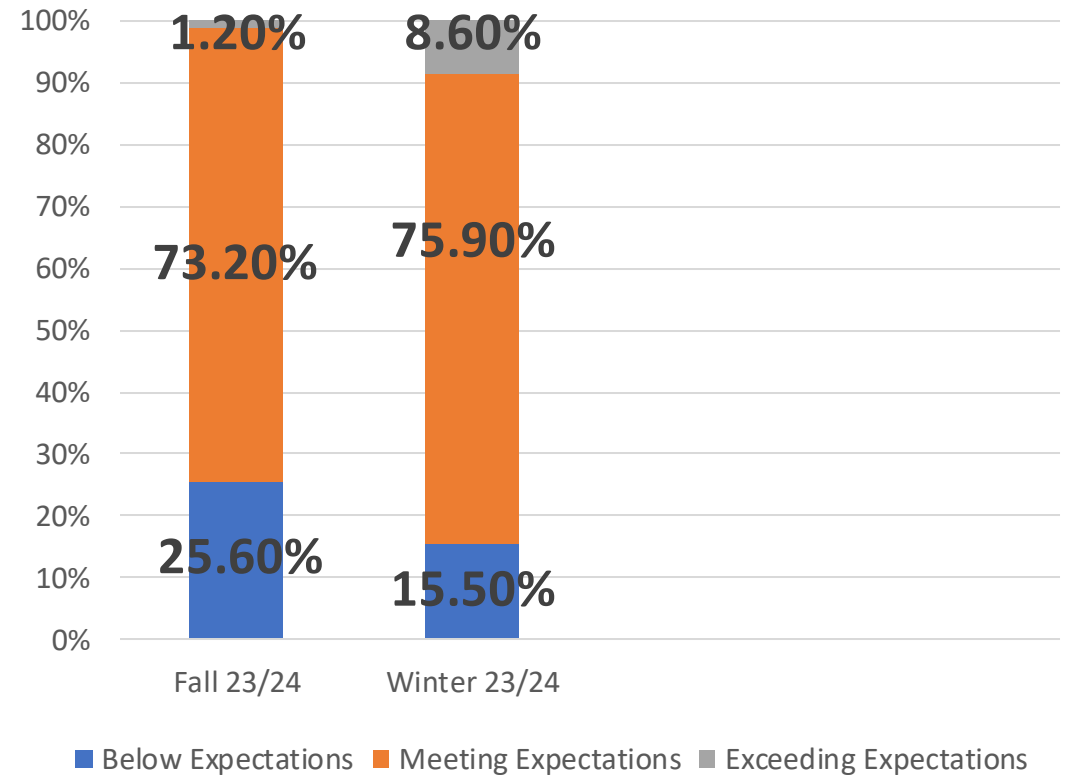
Head Start 3 year olds

Fall (162 children)/Winter (186 children)

Social-Emotional



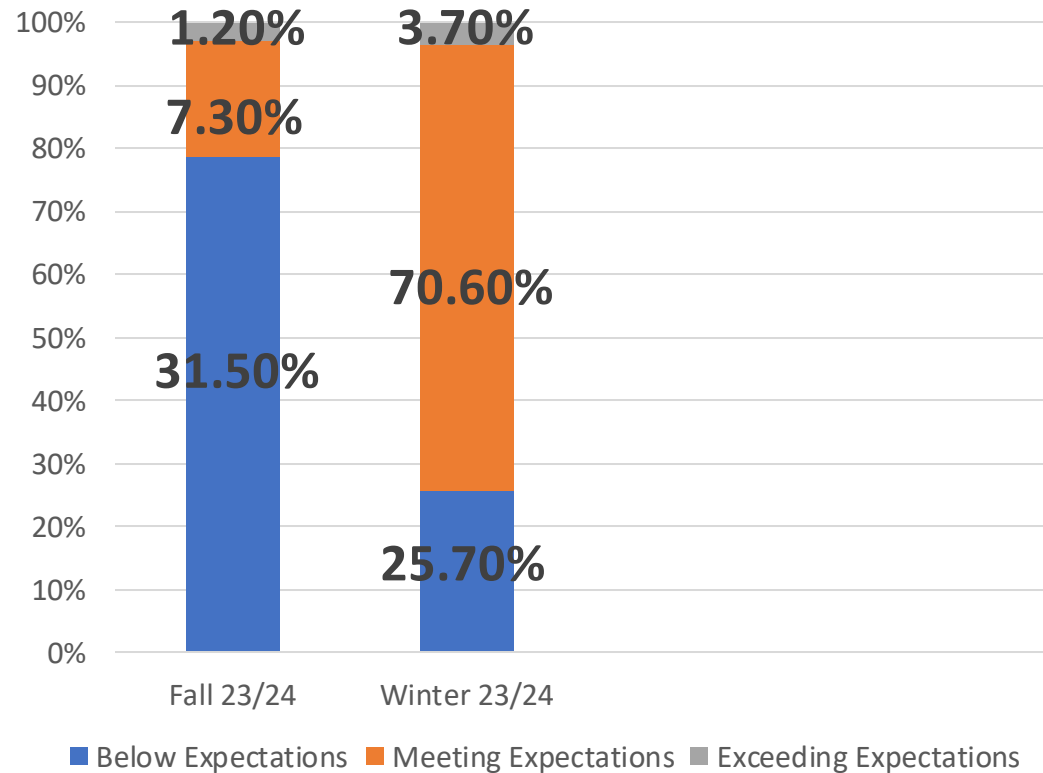
Physical



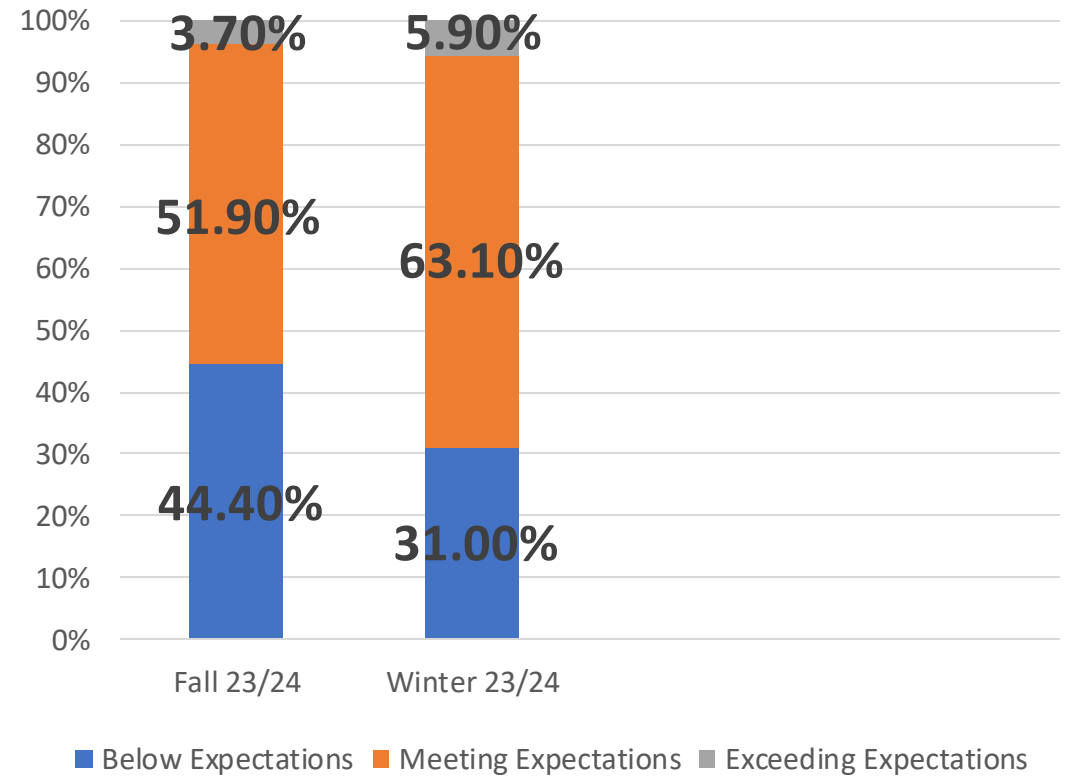
Head Start 3 year olds

Fall (162 children)/Winter (186 children)

Language



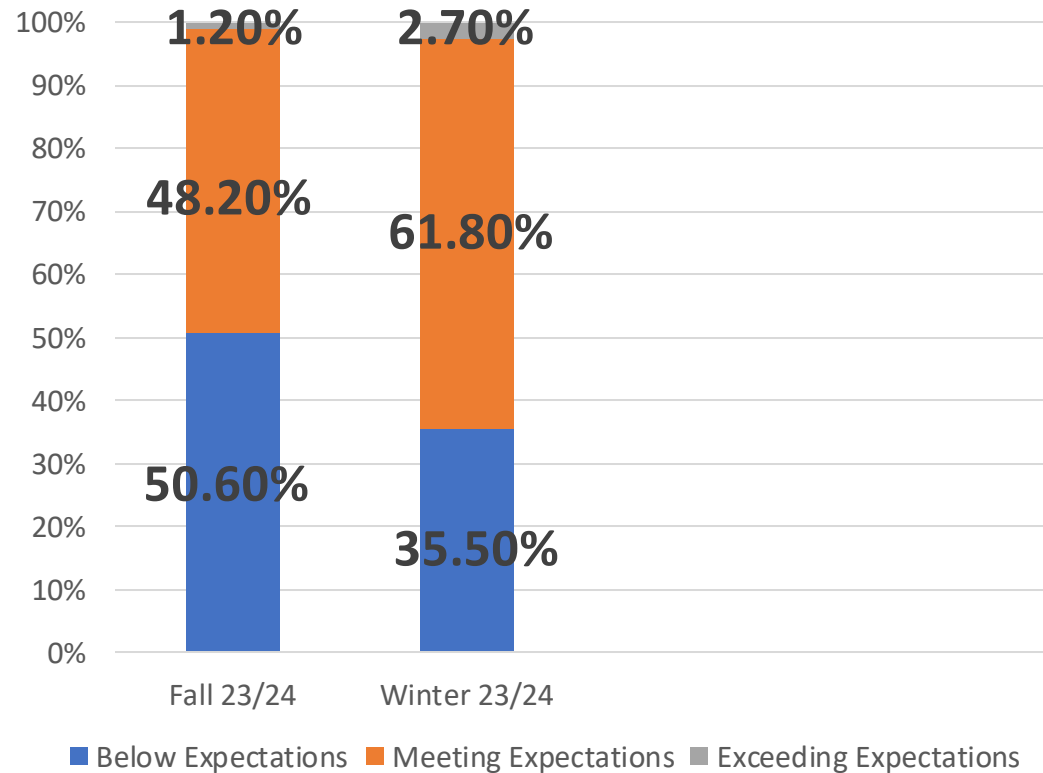
Cognitive



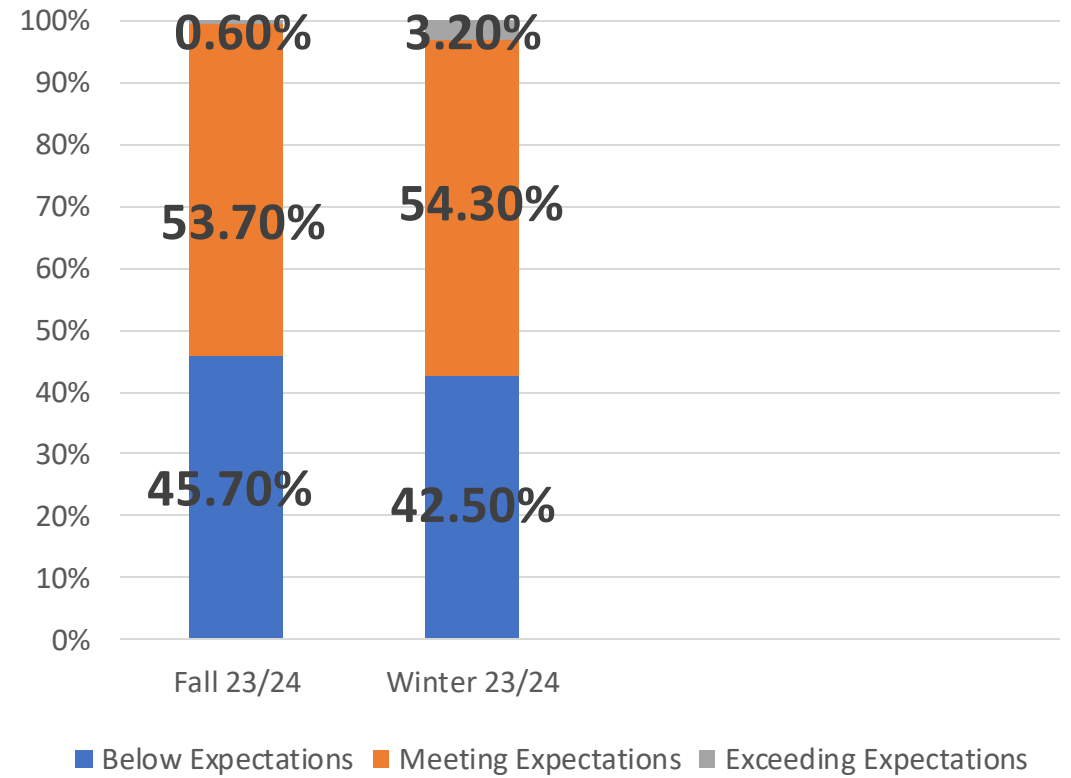
Head Start 3 year olds

Fall (162 children)/Winter (186 children)

Literacy

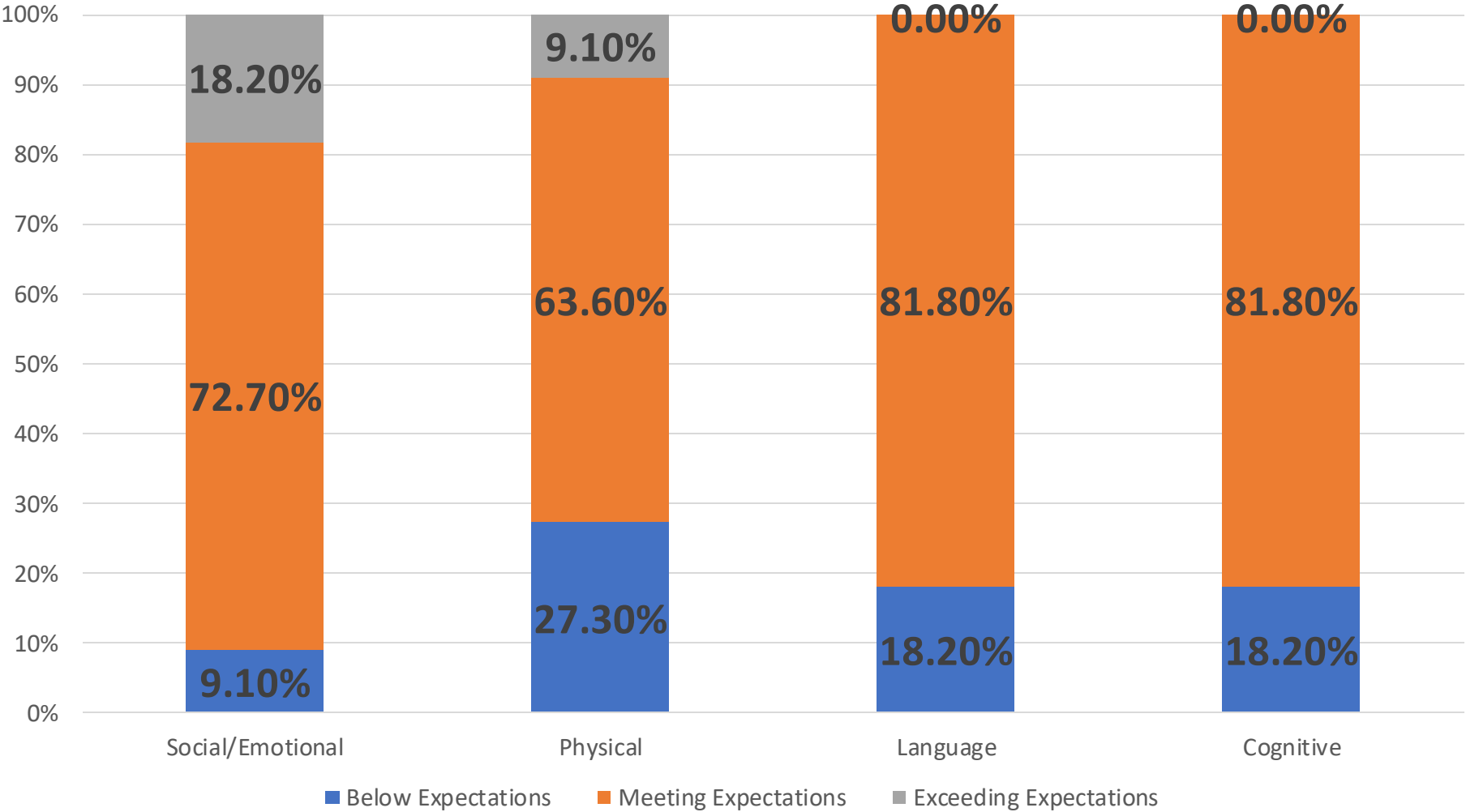


Mathematics



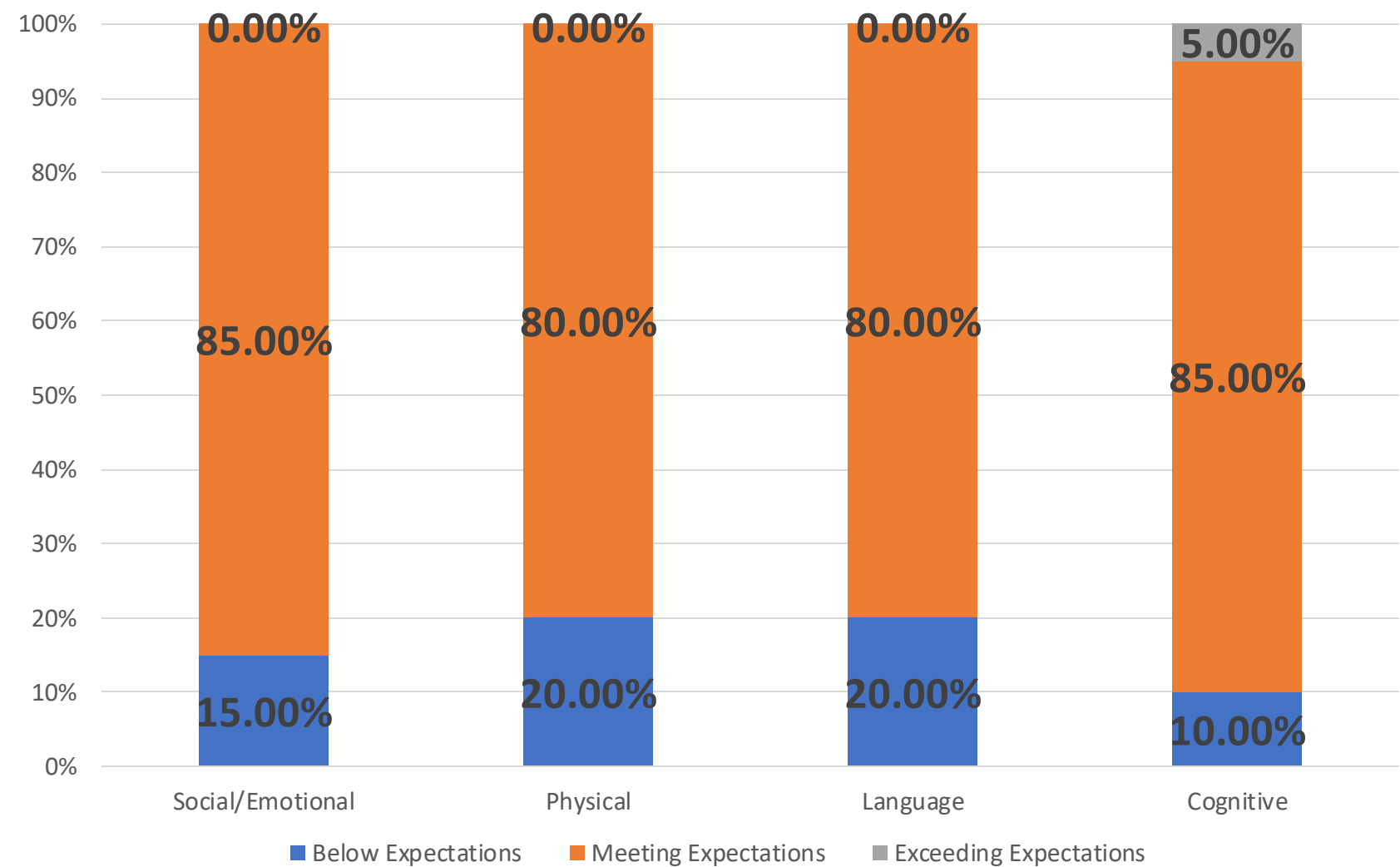
EHS 2 years-3 years

Winter (11 children)



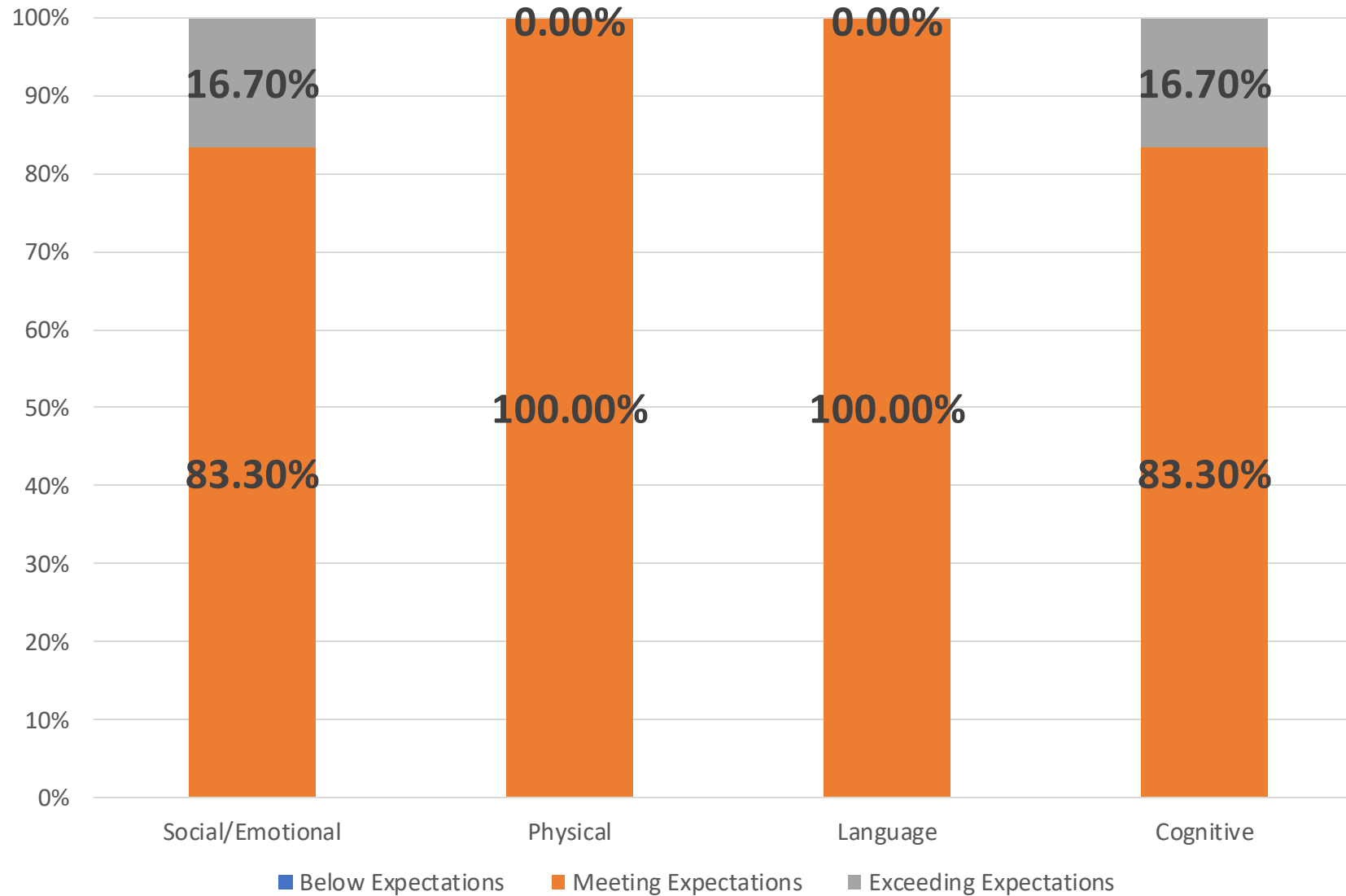
EHS 1 year-2 years

Winter (20 children)



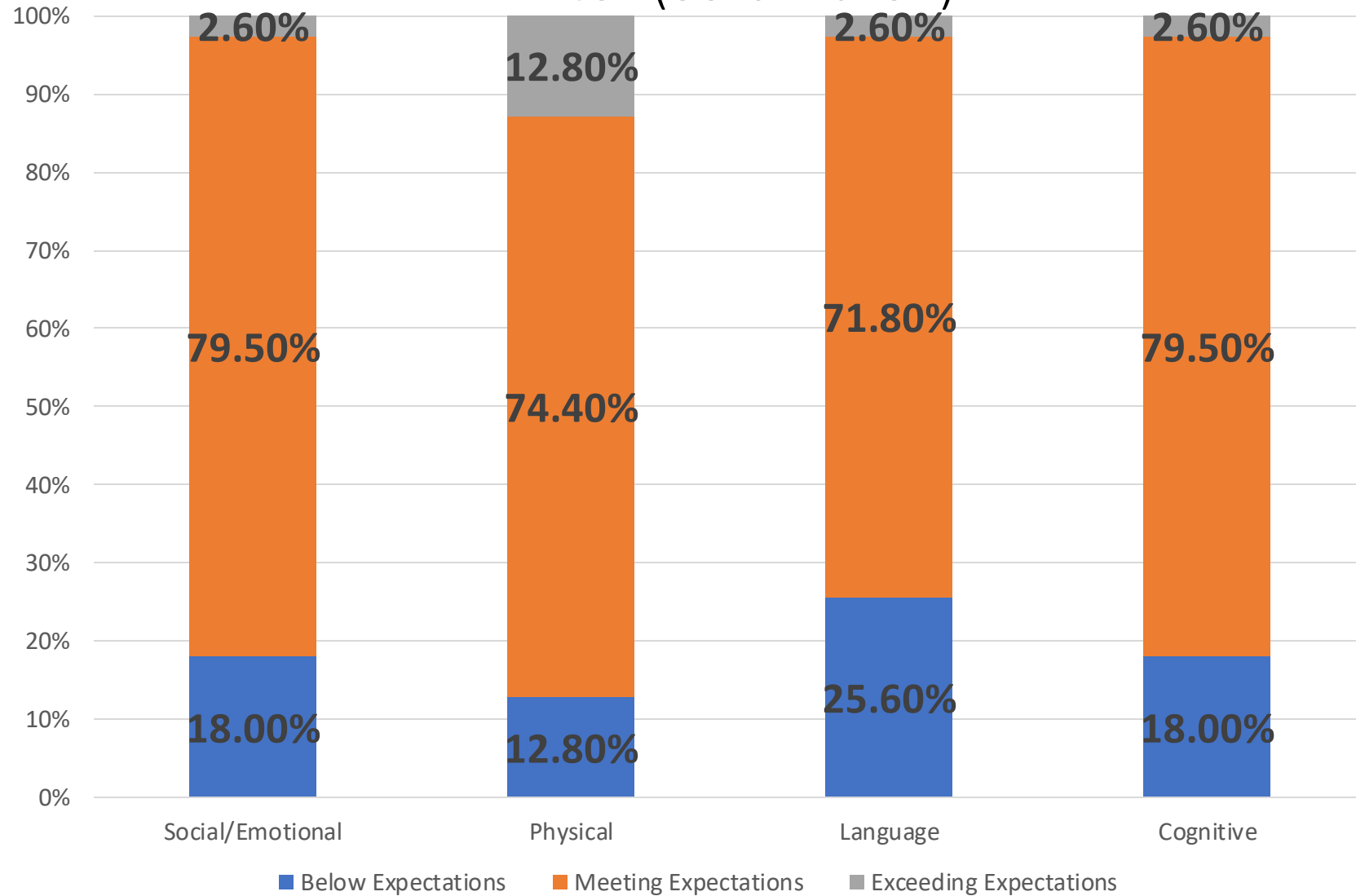
EHS Birth-1 year

Winter (6 children)



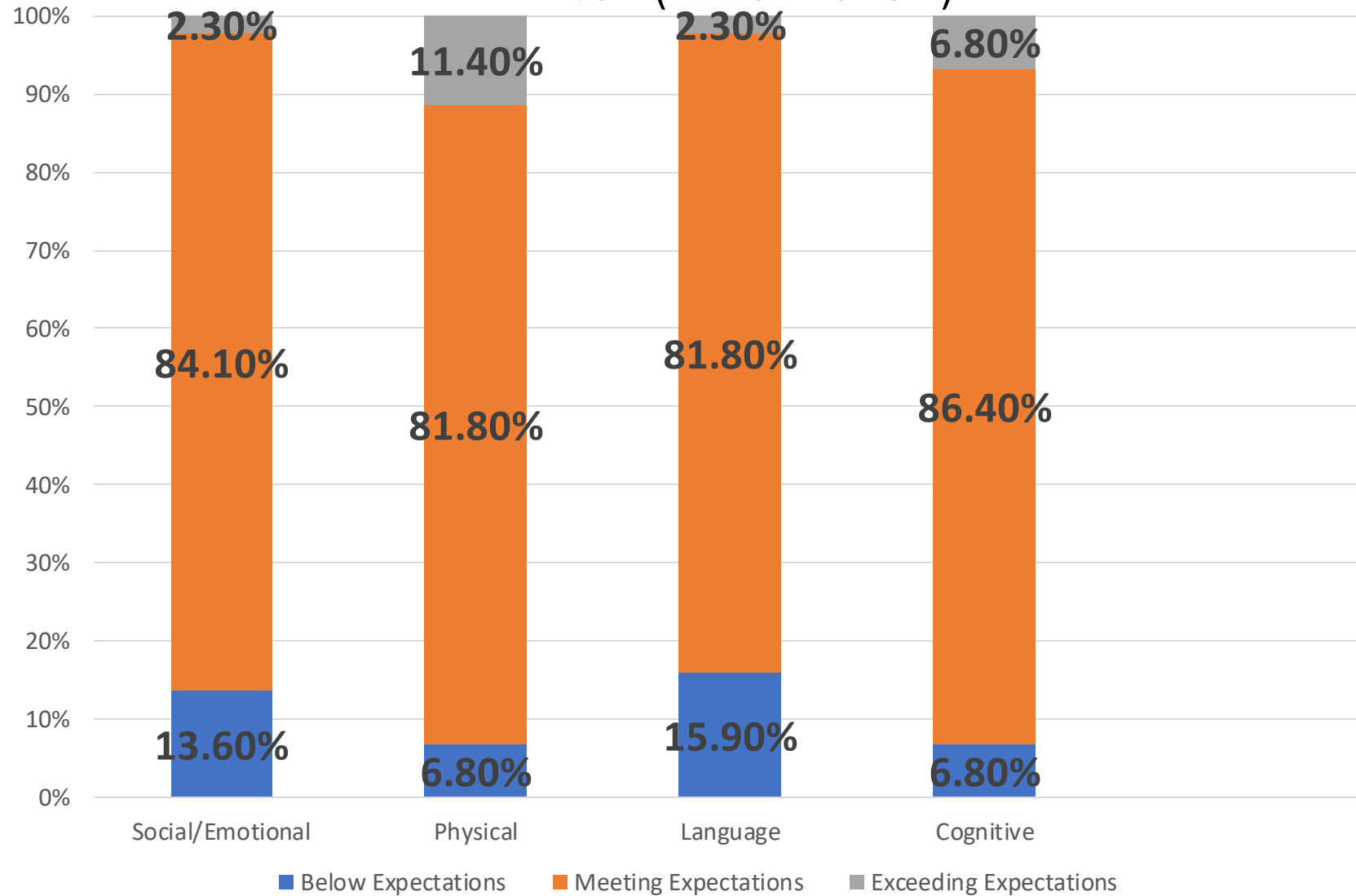
EHS-CC 2 years-3 years

Winter (39 children)



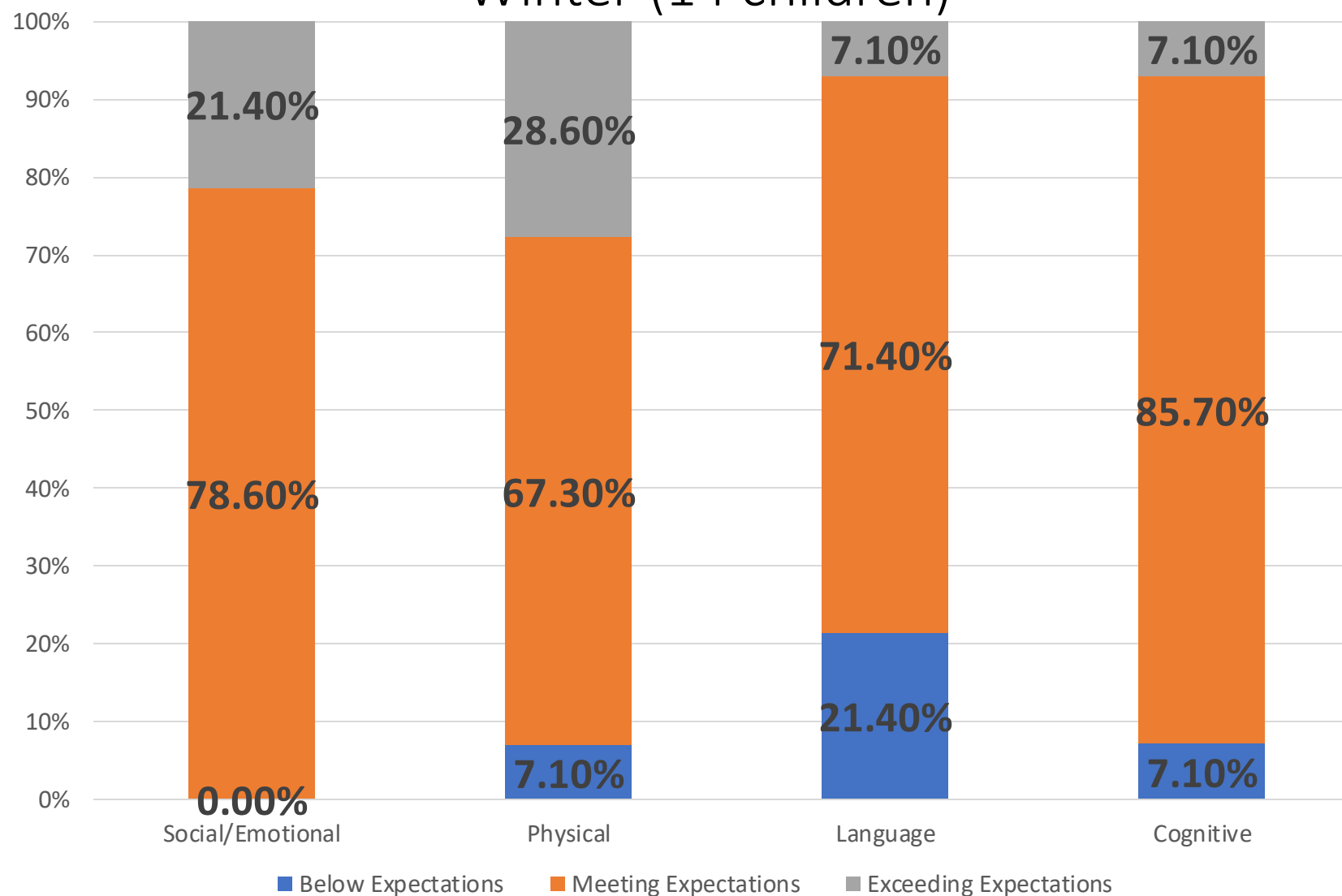
EHS-CC 1 year-2 years

Winter (44 children)



EHS-CC Birth-1 year

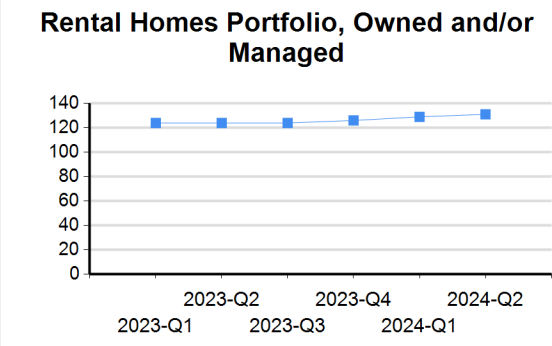
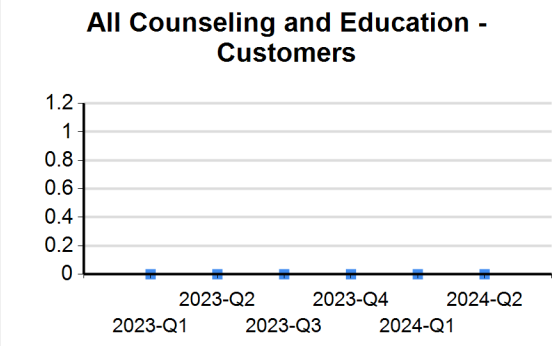
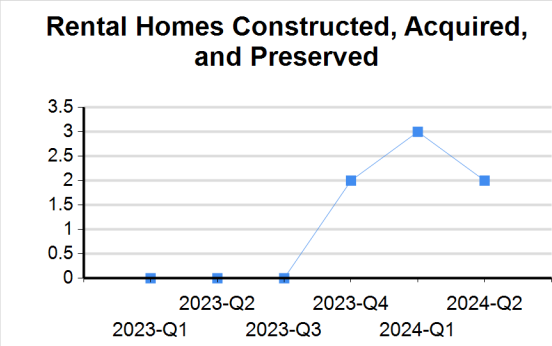
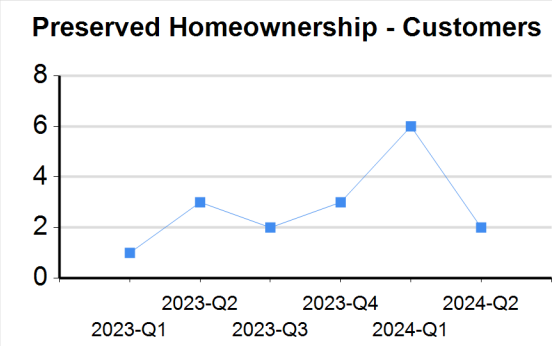
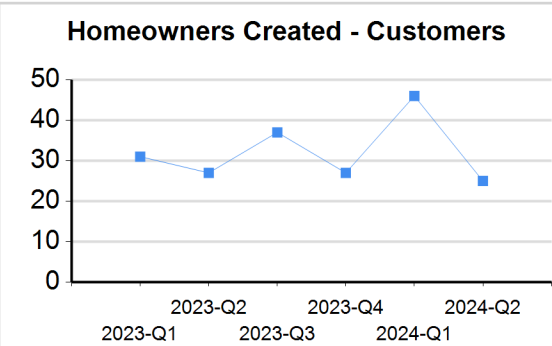
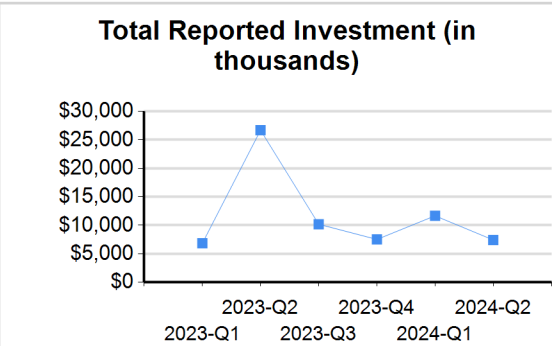
Winter (14 children)



Quarterly Production Summary Report
January 1 - March 31 2024

8251 - LIFT Community Action Agency
Midwest Region

Total Reported Investment	\$7,415,948.81
Homeowners Created - Customers	25
Preserved Homeownership - Customers	2
Rental Homes Constructed, Acquired, and Preserved	2
Created and Preserved Homes and Customers	29
Owner Occupied Repairs - Homes	30
Rental Homes, Repaired	0
Total Repaired - Homes	30
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	0
Foreclosure Mitigation Counseling Intake - Customers	0
Rental Homes Portfolio, Owned and/or Managed	131



'Total Reported Investment' and 'Created and Preserved Homes and Customers' are the two measures that NeighborWorks America uses to demonstrate and evaluate the strength and impact of network organizations.

Quarterly Production Summary Report
January 1 - March 31 2024

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	\$0.00	\$0.00	\$0.00	\$1,227,500.00	\$4,602,644.32	\$5,830,144.32
Homes	0	0	0	7	18	25
Customers	0	0	0	7	18	25
	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	\$12,696.49	\$0.00	\$0.00	\$0.00	\$0.00	\$12,696.49
Homes	2	0	0	0	0	2
Customers	2	0	0	0	0	2

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	\$24,125.00	\$1,227,500.00	\$0.00	\$319,397.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,086.00	\$0.00
Homes	30	* 7	0	2	0	0					

*Units reported under For-Sale Homes Developed do not count towards Total Production, Investment does count toward Total Investment.

III. Rental Homes Portfolio		IV. Commercial Development Portfolio		V. Group Education Customers	
a. Owned	131	Number of Projects	0	a. Completed financial literacy workshop; including home affordability; budgeting and understanding use of credit	0
b. Managed not Owned	0	Square Footage	0	b. Completed predatory lending; loan scam or other fraud prevention workshop	0
c. Number of units covered by project-based rental assistance program	0	Shared Equity and Cooperative Housing Portfolio		c. Completed fair housing workshop	0
d. Number of units covered by tenant-based rental assistance program	64	Community Land Trust	0	d. Completed homelessness prevention workshop	0
		Deed-Restricted Homeownership	0	e. Completed rental workshop	0
		Limited Equity Cooperative	0	f. Completed pre-purchase homebuyer education workshop	0
				g. Completed non-delinquency post-purchase workshop; including home maintenance and/or financial management for homeowners	0
				h. Completed resolving or preventing mortgage delinquency workshop	0
				i. Completed disaster preparedness assistance workshop	0
				j. Completed disaster recovery assistance workshop	0
				Total Group Education	0

VI. Counseling Results - Customers					
Preserved Homeownership, Foreclosure Mitigation - Customers		Foreclosure Mitigation Counseling, Home Not Retained - Customers		Individual Counseling - Services	
a. Mortgage refinanced	0	a. Executed a deed-in-lieu	0	a. Homeless Assistance	0
b. Brought mortgage current	0	b. Sold property/chose alternative housing solution	0	b. Rental Topics	0
c. Mortgage modified	0	c. Pre-foreclosure sale	0	c. Pre-purchase/Homebuying	0
d. Received second mortgage	0	d. Mortgage Foreclosed	0	d. Non-Delinquency Post-Purchase	0
e. Initiated forbearance agreement/repayment plan	0	e. Bankruptcy	0	e. Reverse Mortgage	0
f. Obtained partial claim loan from FHA lender	0	f. Entered debt management	0	f. Resolving or Preventing Forward Mortgage Delinquency or Default	0
Preserved Homeownership, Foreclosure Mitigation - Customers (Total)	0	g. Counseled and referred for legal assistance	0	g. Resolving or Preventing Reverse Mortgage Delinquency or Default	0
		h. Other (final result not listed above)	0	h. Disaster Preparedness Assistance	0
		Foreclosure Mitigation Counseling, Home Not Retained - Customers (Total)	0	i. Disaster Recovery Assistance	0
				Total Counseling Services	0

VII. Revolving Loan Fund (RLF), Excluding Forgivable and Deferred					
First Mortgages		Subordinate Mortgages		Revolving Loan Fund (RLF), Non Amortized	
a. Total outstanding number of RLF loans	5	j. Total outstanding number of RLF loans	0	a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total outstanding value RLF loans	\$333,469.00	k. Total outstanding value of RLF loans	\$0.00	b. Total value of outstanding non-amortized loans (excluding forgivable)	\$0.00
c. Number currently 30-59 days delinquent	0	l. Number currently 30-59 days delinquent	0		
d. Value currently 30-59 days delinquent	\$0.00	m. Value currently 30-59 days delinquent	\$0.00		
e. Number currently 60-89 days delinquent	1	n. Number currently 60-89 days delinquent	0		
f. Value currently 60-89 days delinquent	\$140,460.00	o. Value currently 60-89 days delinquent	\$0.00		
g. Number currently 90 days or more delinquent	1	p. Number currently 90 days or more delinquent	0		
h. Value currently 90 days or more delinquent	\$16,217.00	q. Value currently 90 days or more delinquent	\$0.00		
i. Delinquency Rate (90 days or more)	4.86 %	i. Delinquency Rate (90 days or more)	0.00 %		

IX. Home Ownership Customers: Education and Counseling Hours							
0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	25	100.00 %

LIFT C.A.A., Inc.
Head Start/Early Head Start/Early Head Start-Child Care
Policy Council
1005 South 5th Street
Hugo, OK 74743

March 19, 2024
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, March 19, 2024 at 10:30 a.m. at 1005 S. 5th Street in Hugo, Oklahoma. Notice of time, place and agenda of meeting was posted within prominent view at 1005 S 5th Street, Hugo, Oklahoma twenty-four (24) hours prior to the meeting.

The meeting was called to order at 10:31 a.m. by Darla Galyon, HS/EHS/EHS-CC Director in absence of the Policy Council Chairperson. A quorum was met, members present were Teaha Crow, Boswell II; Julie Dudley, Rattan I; Key'Osha Jone, Cabbage Patch; Steve Woldanski, Hugo EHS; Harli Phillips, Hugo ELC; Lisa Heady, Patsy Guess and Clinton Crawley, Community Representatives.

HS/EHS/EHS-CC staff present included: Darla Galyon; HS/EHS/EHS-CC Director, Jordan Mack; HS/EHS/EHS-CC Assistant Director, Mattie McKee; HS/EHS/EHS-CC Assistant Director, Lori Henry; HS/EHS/EHS-CC Secretary, Ronda Spear; Health Assistant Specialist, Lauren Barger; Nutrition Specialist, Johonna House, Nutrition Assistant; Susie Mashburn; Education Specialist, Sommer Springfield; Assistant Education Specialist, Sara Moore; Professional Development Specialist, Brittany Bailey; ERSEA Specialist, Brianna Nelson; Assistant ERSEA Specialist, Christina Merritt; FCE/Disability/Mental Health Assistant, Tori Williams; Health Specialist, Ashley Gaddy; Outreach Specialist and Taryn Creasman; FCE Specialist.

Consideration, Discussion and Vote to Accept the minutes from the January 16, 2024 and February 20, 2024 meeting. Copies of the minutes were provided to the council for review. Harli Phillips made a motion to approve and Patsy Guess seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Enter into Executive Session to Discuss the employment, transfer, hiring, appointment, promotion, demotion or disciplining of employees: Chianne Taylor- Ft. Towson Teacher Assistant, Melissa Starr-Murray-Hugo EHS Caregiver, Breanna Melton-Idabel EHS Caregiver, Rickey Fields-Idabel HS/EHS Cook, Lizzie Stotts-Hugo II Special Needs Aide, Larketha Moody-Substitute, Deborah Rebik-Haworth Special Needs Aide, Carley Minnaar-Ft. Towson Teacher Assistant, Nadine Wesley-Idabel Bus Monitor/Custodian, Zoe Gilmore from Substitute to Soper I Teacher Assistant and Veronica Macon from Idabel EHS Caregiver to EHS-CC Family Advocate, pursuant LIFT, CAA Okla. Stat. title 25§ 307 (b) (1). No motion was made, therefore not vote was needed.

Consideration, Discussion, and Vote to Adjourn Out of the Executive Session and the Regular Board Meeting Be Reconvened. Did not enter into Executive Session, therefore no vote was needed.

Consideration, Discussion and Vote to Approve New Hires, Transfers and Terminations Recommended by the Personnel Committee. Lisa Head made a motion to approve and Harli Phillips seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve the Submission of Oklahoma Early Childhood Program Grant Application (Year 19) to Community Action Project of Tulsa County in the amount of \$181,239.38 (Match: \$90,812.94). With no quorum, this item was tabled until the March 19, 2024 scheduled meeting.

Consideration, Discussion and Vote to Approve the Submission of Oklahoma Early Childhood Program Grant Application (Year 19) to Community Action Project of Tulsa County in the amount of \$181,239.68 (Match: \$90,812.94): Darla Galyon, HS/EHS/EHS-CC Director explained to the council that the Oklahoma Early Childhood Program grant is a supplemental funding source used to enhance the quality of LIFT, CAA Early Head Start and Early Head Start-Child care Programs. This grant provides the agency's children birth to age three programs the ability to raise the quality of existing classrooms in various aspects. The funding provides the resources needed to supplement staff salaries, heighten training opportunities that would otherwise be unobtainable, and raise classroom monitoring standards. Harli Phillips made a motion to approve submission and Lisa Heady seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Accept HS, EHS, EHS-CC, SAF, Community Facilities, OEC, USDA and Non-Fed November, 2023 Financial Statements and credit Card Distribution Reports. Darla Galyon, HS/EHS/EHS-CC Director provided copies and an overview of the November, 2023 financial statements and Credit Card Distribution Report for the Council and it was reviewed and recommend by the Finance Committee to vote for approval. Harli Phillips made a motion to approve and Lisa Heady seconded the motion. The motion carried.

Consideration, Discussion and Vote to accept HS, EHS, SAF, Community Facilities, OEC, USDA and Non-Fed December, 2023 Financial Statements and Credit Card Distribution Reports. Darla Galyon, HS/EHS/EHS-CC Director provided copies and an overview of the December, 2023 financial statements and Credit Card Distribution Report for the Council and it was reviewed and recommend by the Finance Committee to vote for approval. Lisa Heady made a motion to approve and Harli Phillips seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve Submission of FY 2024 Early Head Start-Child Care Partnership Grant Application (New/Baseline) and Non-Federal Share Waiver Request to Office of Head Start. Darla Galyon, HS/EHS/EHS-CC Director stated that this was year five (5), this funding would provide support for program operations and training/technical assistance for the EHS-CC Program for a period of one year, serving infants and toddlers in partnership with Antlers ELC, Hugo ELC, Broken Bow ELC, Idabel ELC, The Learning Tree and Cabbage Patch Day Care. The total amount request is \$2,216.745 and the program is also requesting a full waiver of the Non-Federal Share. Harli Phillips made a motion to approve submission and Key'Osha Jones seconded the motion. The motion carried.

Presentation of the HS, EHS, SAF, Community Facilities, OEC, USDA, and Non-Fed January, 2024 and February, 2024 Financial Statements and Credit Card Distribution Reports. Darla Galyon, HS/EHS/EHS-CC Director presented the January, 2024 and February, 2024 Financial Statements and Credit card Distribution Reports and gave an overview of them along with

an explanation of where non-fed monies come from for members present to review and vote on at the April 16, 2024 meeting. Copies will be mailed to members not present.

Consideration, Discussion and Vote to Approve the 2024-2025 HS/EHS/EHS-CC ERSEA (Eligibility, Recruitment, Selection, Enrollment and Attendance) Plan and the ERSEA Integrated Policies and Procedures with Prisonization Schedule/Point System. Brittany Bailey, ERSEA Specialist. Brittany Bailey, ERSEA Specialist provided an overview and discussion along with copies of the ERSEA plan for review by the council members. Mrs. Bailey also provided a handout and training on ERSEA Integrated Policies and Procedures with Periodization Schedule/Point System. Mrs. Bailey stated there were not changes or suggestions made to the plan. Lisa Heady made a motion to approve and Key'Osha Jones seconded the motion. The motion carried.

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey, ERSEA Specialist reported that as of today, 3/19/2024 290 children have been enrolled in the Head Start classrooms. Head Start attendance was 85.0 %. Early Head Start currently has 41 children enrolled and attendance was 79.3%. Early Head Start-CC currently has 109 children enrolled and attendance was 80.1%. Recruitment is on-going and applications are still be accepted and processed.

USDA Meals and Snack Report-Lauren Barger, Lauren Barger, Nutrition Specialist provided a copy and an overview summary of meals and snacks served for February, 2024.

Governing Board Report: Mattie McKee- Mattie McKee reported the Governing Board met on March 12, 2024 and gave an overview of each agenda, which was attached for review and that all HS/EHS/EHS-CC items were approved.

Data Analysis-Jordan Mack-Jordan Mack gave an overview of the data assessed for January, 2024

OHS Communications and Guidance-Darla Galyon presented and reviewed all OHS Communications and Guidance received since the last council meeting.

Program Summary Report-Darla Galyon presented the HS/EHS/EHS-CC Program Summary for the council to review.

Consideration, Discussion, and Vote on New Business (Not known about or which could not have been reasonably foreseen prior to time of posting the agenda. Okla. Stat. Title 25 § 311): There was none.

There being no other business to come before the board, the meeting ended at 11:03 a.m.

Lindsey Kent-Chairperson
Key'Osha Jones-Vice-Chairperson
Titeuna Mitchell-Secretary

LIFT C.A.A., Inc.
Head Start/Early Head Start/Early Head Start-Child Care
Policy Council
1005 South 5th Street
Hugo, OK 74743

April 16, 2024
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, April 16, 2024 at 10:30 a.m. at 1005 S. 5th Street in Hugo, Oklahoma. Notice of time, place and agenda of meeting was posted within prominent view at 1005 S 5th Street, Hugo, Oklahoma twenty-four (24) hours prior to the meeting.

The meeting was called to order at 10:30 a.m. by Lindsey Kent, Policy Council Chairperson. A quorum was met, members present were Teaha Crow, Boswell II; Key'Osha Jone, Cabbage Patch; Madison Prangle, Hugo II; Harli Phillips, Hugo ELC; Lindsey Kent, Idabel III; Clinton Crawley, and Consuelo Splawn, Community Representatives.

HS/EHS/EHS-CC staff present included: Darla Galyon; HS/EHS/EHS-CC Director, Jordan Mack; HS/EHS/EHS-CC Assistant Director, Mattie McKee; HS/EHS/EHS-CC Assistant Director, Lori Henry; HS/EHS/EHS-CC Secretary, Ronda Spear; Health Assistant Specialist, Lauren Barger; Nutrition Specialist, Johonna House, Nutrition Assistant; Susie Mashburn; Education Specialist, Sommer Springfield; Assistant Education Specialist, Sara Moore; Professional Development Specialist, Brittany Bailey; ERSEA Specialist, Brianna Nelson; Assistant ERSEA Specialist, Christina Merritt; FCE/Disability/Mental Health Assistant, Tori Williams; Health Specialist, Ashley Gaddy; Outreach Specialist and Taryn Creasman; FCE Specialist.

Consideration, Discussion and Vote to Accept the minutes from the March 19, 2024 meeting. Copies of the minutes were provided to the council for review. Lindsey Kent made a motion to approve and Harli Phillips seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Enter into Executive Session to Discuss the employment, transfer, hiring, appointment, promotion, demotion or disciplining of employees: Katie Counts-Idabel EHS Caregiver and Taylor Williamson-Clayton Special Needs Aide, pursuant LIFT, CAA Okla. Stat. title 25§ 307 (b) (1). No motion was made, therefore no vote was needed.

Consideration, Discussion, and Vote to Adjourn Out of the Executive Session and the Regular Board Meeting Be Reconvened. Did not enter into Executive Session, therefore no vote was needed.

Consideration, Discussion and Vote to Approve New Hires, Transfers and Terminations Recommended by the Personnel Committee. Lindsey Kent made a motion to approve and Harli Phillips seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve Submission of FY 2023 Disability Waiver Request for Early Head Start-Child Care Partnership Program to the Office of Head Start: Darla Galyon HS/EHS/EHS-CC Director explained that this is a request seeking approval from the Office of Head Start to waive the 10% requirement for enrollment of children with disabilities in the EHS-Child Care Program as the program was not able to meet it this year. 102 children enrolled in Early Head Start-Child Care and of those 107 enrolled, 5 children (4.6%) with diagnosed disabilities are enrolled. Harli Phillips made a motion to approve submission and Lindsey Kent seconded the motion. The motion carried.

Consideration, Discussion and Vote to accept HS, EHS, EHS-CC, SAF, Community Facilities, OECP, USDA, and Non-Fed January, 2024 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director provided copies and an overview of the January, 2024 financial statements and Credit Card Distribution Report for the Council and it was reviewed and recommend by the Finance Committee to vote for approval. Harli Phillips made a motion to approve and Key'Osha Jones seconded the motion. The motion carried.

Consideration, Discussion and Vote to accept HS, EHS, EHS-CC, SAF, Community Facilities, OECP, USDA, and Non-Fed February, 2024 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director provided copies and an overview of the February, 2024 financial statements and Credit Card Distribution Report for the Council and it was reviewed and recommend by the Finance Committee to vote for approval. Harli Phillips made a motion to approve and Lindsey Kent seconded the motion. The motion carried.

Presentation of the LIFT Head Start/Early Head Start/Early Head Start Child Care 2023-2028 Strategic Plan: Jordan Mack, HS/EHS/EHS-CC Assistant Director provided a copy of the 2023-2028 Strategic Plan along with an overview and discussion on how and why the plan is updated every 5 years by the program. Mrs. Mack gave in detail how the plan was created and asked the council for input and suggestions. The plan will be brought back at the May, 2024 scheduled meeting for recommendation for approval by the policy council.

Presentation of the HS, EHS, SAF, Community Facilities, OECP, USDA, and Non-Fed March, 2024 Financial Statements and Credit Card Distribution Reports. Darla Galyon, HS/EHS/EHS-CC Director presented the March, 2024 Financial Statements and Credit card Distribution Reports and gave an overview of them along with an explanation of where non-fed monies come from for members present to review and vote on at the May 21, 2024 meeting. Copies will be mailed to members not present.

Policy Council Training-Re-energizing the Parent Committee and Leadership Skills: Sarah Moore, Professional Development Specialist provided handouts along with a brief discussion on re-energizing the parent committee and Leadership Skills.

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey, ERSEA Specialist reported that as of today, 4/16/2024 293 children have been enrolled in the Head Start classrooms. Head Start attendance was 86.8 %. Early Head Start currently has 46 children enrolled and attendance was 78.6%. Early Head Start-CC currently has 107 children enrolled and attendance was 82.4%. Recruitment is on-going and applications are still be accepted and processed.

USDA Meals and Snack Report-Lauren Barger, Lauren Barger, Nutrition Specialist provided a copy and an overview summary of meals and snacks served for March, 2024.

Governing Board Report: Mattie McKee- There was no Governing Board meeting in April due to the Agency being closed for the Solar Eclipse.

Data Analysis-Jordan Mack-Jordan Mack gave an overview of the data assessed for February, 2024

OHS Communications and Guidance-Darla Galyon presented and reviewed all OHS Communications and Guidance received since the last council meeting.

Program Summary Report-Darla Galyon presented the HS/EHS/EHS-CC Program Summary for the council to review.

Consideration, Discussion, and Vote on New Business (Not known about or which could not have been reasonably foreseen prior to time of posting the agenda. Okla. Stat. Title 25 § 311): There was none.

There being no other business to come before the board, Lindsey Kent made a motion to adjourn and Harli Phillips seconded the motion. The motion carried and the meeting was adjourned at 11:09 a.m.

Lindsey Kent-Chairperson
Key'Osha Jones-Vice-Chairperson
Titeuna Mitchell-Secretary

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



_____	Is creative _____
XXXX	Likes to learn new things _____
XXXX	Is a good listener _____
XXXX	Communicates well _____
XXXX	Dependable _____
_____	Respectful, considerate of others _____
_____	Safety conscious _____
_____	Good problem solving skills _____
XXXX	Other NETSUITE _____
_____	Other _____
_____	Other _____

Use this space if you have anything additional that you would like to say about the person being nominated.

Through the many changes and challenges created by the software change, one program/group has exceeded all expectations. While no one likes change, their acceptance of the change and their willingness to make the necessary adjustments was remarkable. This much of this was undoubtedly due to Johnny Driggers. Do not misunderstand, the whole process has had a lot of trial and error but that "can do attitude" and attention to details was invaluable. The result to this, is easy for me to see and especially when it comes to reconciling any unpaid bills at the end of the month.

His paperwork is organized, correct, and submitted timely. I appreciate Johnny's willingness to utilize the tools and information provided via the new software and Microsoft 365. Johnny is very good at responding to email, phone calls and communicating the needs of his program and the intricate details of the specialty items used. Make no mistake the entire WX Program deserve an award for this, but I had to start with someone. NO OTHER PROGRAM HAS MADE THIS MUCH PROGRESS WITH THE CHANGES!

Submit nominations by the 30th of the month for consideration. Submit nominations to Kathy James at the Administration Office, by mail (209 N. 4th St., Hugo, OK 74743), by fax (580-326-2305), or by email (kathy.james@liftca.org). Nominations are judged by a five-member committee. If the person you nominate is not selected, it is okay to nominate that person again the following month if you feel he/she is deserving of the award.

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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: 5.8.2024

Name of Person being nominated for Employee of the Month: Alex Wallis

Name of Person submitting the nomination: Kelly Thomas

- | | | |
|----------|--|--|
| <u>X</u> | Is a hard worker | <u>Alex works with 4 women and takes care of all of the unpleasentries in the building and does it with a smile</u> |
| <u>X</u> | Respects others | <u>Alex is very respectful of everyone staff and visitors alike</u> |
| <u>X</u> | Is on time | <u>every time</u> |
| <u>X</u> | Is organized | <u>Alex is very organized,</u> |
| <u>X</u> | Keeps a positive attitude | <u>is very positive</u> |
| <u>X</u> | Encourages other people | <u>He enoucourages and helps participants with their job hunt and interviewing needs</u> |
| <u>X</u> | Is willing to help others | <u>More than willing he just does it</u> |
| <u>X</u> | Makes a good first impression | <u>Alex is very friendly and approachable</u> |
| <u>X</u> | Follows all workplace rules | <u>Yes sometimes to a fault :)</u> |
| <u>X</u> | Uses resources wisely | <u>is cost aware of resources</u> |
| <u>X</u> | Has good work attendance | <u>rarely misses</u> |
| <u>X</u> | Represents the agency well | <u>Yes he does</u> |
| <u>X</u> | Is a loyal employee | <u>Alex is very loyal to this program</u> |
| <u>X</u> | Handles crisis well | <u>Alex handles all of our technology operations and most situations come with a crisis and he is calm and solves them all</u> |
| <u>X</u> | Goes above and beyond the call of duty | <u>Alex does all that is asked even when he doesnt have to.</u> |
| <u>X</u> | Works well with others (team player) | <u>Is a superb team player</u> |

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- X Is creative He has to be with this being a new program he has had to learn how to work with the live stream training
- X Likes to learn new things Alex is very cleaver in working with the high tech equipment and is always trying to make it work better
- X Is a good listener he has excellent listening skills,
- X Communicates well Alex is an excellent communicator, he knows how to get his point accross in a fun ,unique and kind way
- X Dependable if alex says he will, then he does
- X Respectful, considerate of others every day
- X Safety conscious He is our designated building safety person
- X Good problem solving skills He is the best among us, his technology problem solving skills are superb
- Other _____
- Other _____
- Other _____

Use this space if you have anything additional that you would like to say about the person being nominated.

Alex takes the lead on the technology requirements for the WRO, he evaluates the need and then executes a plan. He moves heavy furniture and equipment and doesnt ask for help (even tho we offer it, he says "I got this") Alex is a real asset to this program, it he quit today the program would suffer great loss and we would feel the sting of his absense. Alex has a fun personality and you usually can hear him giggling somewhere in the building and he loves hot tea.

When I need errands ran even to Hugo, he will do them and never fuses. He takes the lead on preparing all of the equipment for the monthly job fairs. Any time I ask him to do something he may say I dont know how but I will figure it out and he does . I would love to see him recieve this honor as being May's employee of the month.

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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: 05/08/2024

Name of Person being nominated for Employee of the Month: Alex Wallis

Name of Person submitting the nomination: Kimberly Wright

- | | | |
|----------|--|--|
| <u>X</u> | Is a hard worker | <u>Alex is very dedicated to the center and works hard to keep everything flowing smoothly.</u> |
| <u>X</u> | Respects others | <u>He is very courteous to everyone and is always the first to lend a hand.</u> |
| <u>X</u> | Is on time | <u>Alex takes punctuality very serious.</u> |
| <u>X</u> | Is organized | <u>He stays focused on the task at hand and keeps everything in order.</u> |
| <u>X</u> | Keeps a positive attitude | <u>He has a happy demeanor and works hard to get along with everyone.</u> |
| <u>X</u> | Encourages other people | <u>He motivates others to do the best that they can.</u> |
| <u>X</u> | Is willing to help others | <u>Alex is the first to be in line to help get whatever task completed.</u> |
| <u>X</u> | Makes a good first impression | <u>He has a helpful attitude and makes people feel at ease.</u> |
| <u>X</u> | Follows all workplace rules | <u>He strives to keep things in order and has done a great job at following all rules.</u> |
| <u>X</u> | Uses resources wisely | <u>He is very talented at coming up with cost saving solutions and uses items on hand.</u> |
| <u>X</u> | Has good work attendance | <u>He very rarely takes off.</u> |
| <u>X</u> | Represents the agency well | <u>He is the best person to reach out to member of the community.</u> |
| <u>X</u> | Is a loyal employee | <u>Alex is very serious about the people he works with and for.</u> |
| <u>X</u> | Handles crisis well | <u>Alex works in an area that several times he has to take the lead and make sure everything is working.</u> |
| <u>X</u> | Goes above and beyond the call of duty | <u>He has took on the IT job at the center without complaint.</u> |
| <u>X</u> | Works well with others (team player) | <u>He manages to work with any person that he comes into contact with.</u> |



- X Is creative He can do just about anything he is asked.
- X Likes to learn new things He is constantly looking up new ways to help the center.
- X Is a good listener He pays attention and never has to be asked twice.
- X Communicates well He is very open about anything that needs to be fixed.
- X Dependable Once you even mention something its already taken care of.
- X Respectful, considerate of others He makes sure everyone feels comfortable.
- X Safety conscious He is the WRO Center safety person.
- X Good problem solving skills He has solved every problem set before him.
- Other _____
- Other _____
- Other _____

Use this space if you have anything additional that you would like to say about the person being nominated.

The WRO center uses a ton of tech, Alex is the main person that handles everything. All of our classes are remote and he has came up with systems to make it effortless and easy to use. Without Alex our center would be struggling on the IT front. He is a hard worker and tries to solve problems before they arise.

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Program Summary
Head Start/Early Head Start/Early Head Start-Child Care Programs
March - April 2024

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of April there were 47 children, age birth to 3, that were provided services in the Early Head Start centers and 105 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 294 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 February, we had 123 parents that participated in Parent Meetings. Family Advocates are continuing goals with families through the Family Partnership Agreement's. The centers continue to invite parents and community members in to participate in Parent Ready to Read by having a story time with the children; there were 67 participants, with 9 of them being father figures.

Father Involvement

The Dad's Day activities for the month of February were various heart, mailboxes, and Valentine's Day crafts. For the February Dad's Day, there were 203 people that participated in Dad's Day activities with 92 being father figures. In addition, 28 dads/father figures participated in parent meetings for February. Since the beginning of the 2023-2024 school year, we have had 790 father figures participate in family engagement activities.

Nutrition

In the month of February, the nutrition team completed their second round of CACFP kitchen checks. We were pleased to find there were no findings in our first or second round of CACFP checks. The nutrition team has completed our first round of EHS & EHS-CC folder checks. We have also completed our second round of folder checks for Head Start. BMI letters went out to centers this month, which is based on our children's growth charts. We are looking to fill, Valliant and Idabel HS cook positions. The nutrition team is continuously diving into 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 months of March and April employee physical tracking continued with reminder phone calls/emails. Four 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 91% completion of dentals, for EHS 90% completion, and EHSCC 95% completion. For physicals head start has 91% completion, EHS 81% completion, and EHS-CC 78% completion. All numbers have had an increase to them.

Education

The excitement of Spring Break, the Solar Eclipse, and Week of the Young Child were big events for children and teachers. Many 4-year-old classrooms have participated in visits to public school kindergarten classrooms. Along with various stories and learning activities, teachers prepare children to make the transition for next year. Field trips included Ft. Towson Fort, libraries, petting zoos, theatrical presentations, and the Beaver's Bend train ride. For many children, these are first time experiences that help promote awareness and new learning opportunities.

Professional Development

In April, the Professional Development Specialist scheduled a CPR/First Aid class 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, during April, the Professional Development Specialist helped several employees renew their Professional Development Ladders and Oklahoma Directors Credentials.

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.

At LIFT CAA Head Start/Early Head Start and Early Head Start Child-Care we strive to ensure all new staff meet requirements for the programs in which they work. LIFT CAA HS/EHS/EHS-CC strives for excellence and wants 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 April 2024.

Recruitment for Employment

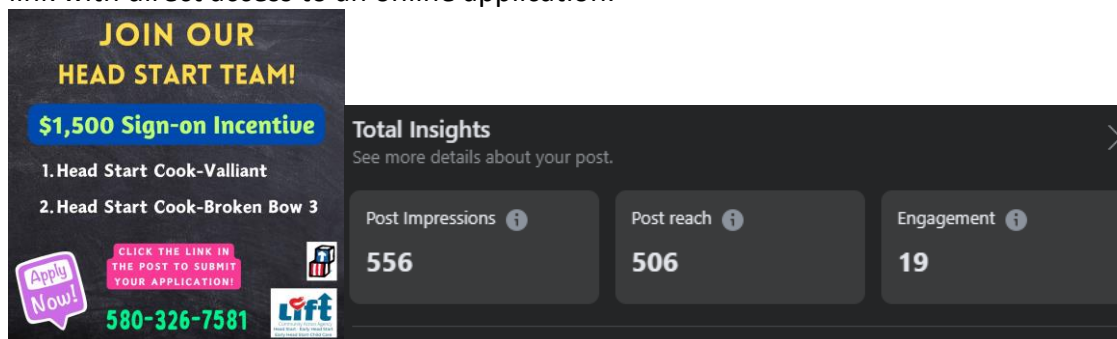
Job Fair

Our HR department set up during this event. HS/EHS/CC provided materials advertising our open job positions and the incentives attached to each position.



Facebook Job Highlights

Each post was posted on our LIFT HS/EHS page with information regarding open positions and a link with direct access to an online application.



JOB HIGHLIGHT OF THE WEEK

\$2,000 SIGN-ON INCENTIVE

Disabilities-Mental Health Specialist

This position serves
Head Start, Early Head Start and Early
Head Start-Child Care!

CLICK THE LINK IN THE POST TO LEARN MORE!

580-326-7581

Apply Now!

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
1,377	1,337	76

JOB HIGHLIGHT OF THE WEEK

\$2,000 SIGN-ON INCENTIVE

Head Start Family Advocate
(Choctaw & McCurtain Counties)

- Retirement Plan
- Employee Assistance Program
- Accrued Sick Leave
- Health, Dental & Vision Insurance

CLICK THE LINK IN THE POST TO LEARN MORE!

580-326-7581

Apply Now!

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
1,371	1,299	56

Updated Now Hiring Flyer

The flyers have been posted on Facebook and distributed in the community.

WE ARE HIRING

CHECK OUT OUR SIGN-ON INCENTIVES!

We are seeking motivated and dependable individuals who will provide a warm and nurturing environment for our early learners to grow and thrive!

Scan the QR code to apply or visit www.liftco.org

580-326-7581

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
3,723	3,279	220

WE ARE HIRING!

CHECK OUT OUR SIGN-ON INCENTIVES!

We are seeking motivated and dependable individuals who will provide a warm and nurturing environment for our early learners to grow and thrive!

SCAN THE QR CODE TO APPLY OR VISIT WWW.LIFTCO.ORG

580-326-7581

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
603	583	34

Hugo Alumni Career Day at Hugo High School

- Information was provided to High School seniors regarding job opportunities within Head Start after they graduate.



Recruitment for Enrollment

Facebook Posts

Each post was posted on our LIFT HS/EHS page with information regarding enrollment and a link with direct access to an online application.

Do you receive Supplemental Nutrition Assistance Program benefits?

SNAP Supplemental Nutrition Assistance Program

Your child may be eligible for free Head Start or Early Head Start services!

Scan the code below for direct access to an application for pre-school services!

It's easy to prove eligibility with any of the following:

- A copy of notice of SNAP approval
- Other documentation of eligibility or benefits from the SNAP agency, such as a screenshot from a SNAP mobile app

LIFT Community Action Agency Head Start - Early Head Start Early Head Start-Child Care

580-326-7581
www.liftca.org

Post Impressions

1,254

Post reach

1,114

Engagement

42

LIFT Community Action Agency Head Start - Early Head Start Early Head Start-Child Care

PRE-SCHOOL

WE PROVIDE QUALITY EARLY CHILDHOOD EDUCATION!

Apply Now!

Questions? Call us! 580-326-7581

WHY CHOOSE US?

- NO COST TO FAMILIES
- SERVING 0-4 YEARS OF AGE
- SCHOOL SUPPLIES PROVIDED
- MEALS, SNACKS, FORMULA, & DIAPERS INCLUDED

LOCATIONS:

Early Head Start: Antlers, Broken Bow, Hugo, Idabel

Head Start: Antlers, Battiest, Boswell, Broken Bow, Clayton, Forest Grove, Fort Towson, Haworth, Hugo, Idabel, Rattan, Soper, Valliant

DO YOU RECEIVE SNAP BENEFITS?

If so, that makes you automatically eligible to apply for our program!

Required Documents:

- ✓ Proof of income for all family members
- ✓ Child's birth certificate
- ✓ Child's Immunization Record
- ✓ Copy of records if your child has been diagnosed with a disability, IEP, IFSP

Scan the code for an application or visit www.liftca.org

LIFT Community Action Agency Head Start - Early Head Start Early Head Start-Child Care

Total Insights

See more details about your post.

Post Impressions

934

Post reach

861

Engagement

31

IT'S TIME TO APPLY FOR PRE-SCHOOL

DON'T WAIT, SUBMIT YOUR APPLICATION FOR THE 2024-2025 SCHOOL YEAR!

- Ages 3-4
- No cost to families
- Meals and snacks included
- All school supplies provided

Lift
Community Action Agency
Head Start

580-326-7581

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
1,472	1,294	53

Lift
Community Action Agency
Early Head Start
Early Head Start-Child Care

SUBMIT YOUR APPLICATION, TODAY!

- Serving birth-36 months
- No cost to families
- Diapers, formula, meals & snacks are provided

LOCATIONS: ANTLETS, BROKEN BOW, HUGO & IDABEL

DO YOU RECEIVE SNAP BENEFITS?
If so, that makes you automatically eligible to apply for our program!

Required Documents:

- ✓ Proof of income for all family members
- ✓ Child's Birth Certificate
- ✓ Child's Immunization Record
- ✓ Copy of records if your child has been diagnosed with a disability, IEP, IFSP

Scan the QR code for an application or visit www.liftca.org

NeighborWorks
CHARTERED MEMBER

580-326-7581 www.liftca.org

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
458	423	14

PRE-SCHOOL
Ages 3-4
Quality education for early learners!

NO COST TO FAMILIES
All school supplies, meals and snacks are provided!

Lift
Community Action Agency
Head Start

580-326-7581

Do you receive SNAP Benefits?
If so, that makes you automatically eligible to apply for our program!

Required Documents

1. Proof of Income
2. Child's Birth Certificate
3. Child's Immunization Record
4. Copy of records if your child has been diagnosed with a disability, IEP, IFSP

Scan the QR code for direct access to an application!

You can also visit www.liftca.org

Antlets
Battiest
Boswell
Broken Bow
Clayton
Forest Grove
Fort Towson

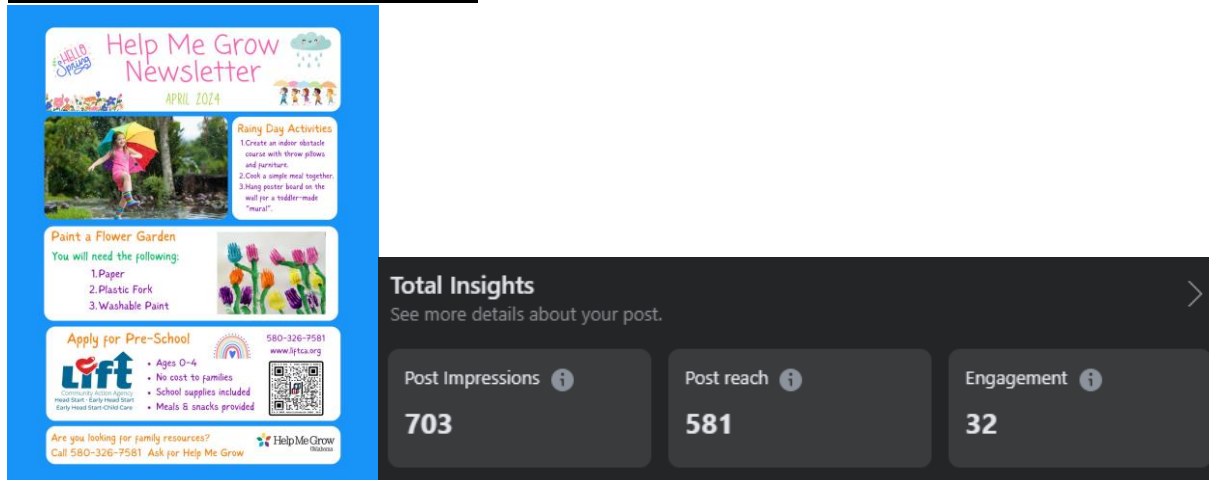
Haworth
Hugo
Idabel
Rattan
Soper
Valiant

HEAD START ADMINISTRATION: 1005 S 5TH ST, HUGO, OK 74743

Total Insights
See more details about your post.

Post Impressions	Post reach	Engagement
1,378	1,267	50

Monthly Help Me Grow Newsletter



Overall Facebook Data for April

Total Reach: 8,300

Facebook Visits: 840

Facebook Follows: 46

Engaging Public Schools

- To further reach possible applicants, flyers have been dropped off at the following schools:
 - Battiest Elementary
 - Bennet Elementary in Broken Bow
 - Central Elementary in Idabel
 - Primary Elementary in Idabel
 - Hugo Elementary
 - Forest Grove Elementary
 - Antlers Elementary
 - Boswell Elementary
 - Soper Elementary
 - Clayton Elementary
 - Rattan Elementary

Community Partner Meetings

- Attended local coalition meetings to discuss local events and provide an update over Head Start, Early Head Start, Early Head Start Childcare and Help Me Grow Oklahoma. Information was provided over our open job positions and enrollment for the 2024-2025 school year.

Health, Family and Community Engagement Meeting

- HS/EHS/EHS-CC held their bi-annual meetings. During the meeting we received updates from each component area and updates from other community organizations. The

Outreach Specialist updated on current recruitment strategies and Help Me Grow Oklahoma.

Radio Ad

Attention: Choctaw, McCurtain and Pushmataha Counties!

Spring into action by submitting your pre-school application for the 2024-2025 school year! Our mission at LIFT Head Start is to help prepare children to be kindergarten-ready! Full day, pre-school services for Head Start are offered in Antlers, Battiast, Boswell, Broken Bow, Clayton, Forest Grove, Fort Towson, Haworth, Hugo, Idabel, Rattan, Soper, and Valliant. We target a child's development in the following areas: social emotional, nutrition, health, and education. We provide ALL school supplies, meals and snacks! There is NO COST to families for pre-school services. Do you receive SNAP benefits? If so, that makes you automatically eligible to apply for our program! You can apply online at www.liftca.org. or pick up an application at any LIFT Community Action Head Start Center! You can also call to have an application sent by mail. For more information you may call the LIFT Head Start Administration Office at 580-326-7581



Explore content posted to the [Early Childhood Learning and Knowledge Center \(ECLKC\)](#) throughout the month of March. These email announcements and resources are helpful for Head Start and Early Head Start programs and other early childhood staff. Find information and tools related to your work with the children and families you support daily. Select the links below to get started. Use the [Español button](#) on each ECLKC page to see its Spanish translation.

News from OHS

- [Biden-Harris Administration Announces New Executive Order and Nearly \\$200M Available in Grants to Expand Registered Apprenticeships](#) (email)
- [Director Garvin Addresses Changes to AIAN and MSHS Eligibility](#) (email)
 - Available in [Spanish \(español\)](#)
- [Director Garvin Announces a Head Start Tribal Request for Information](#) (email)
- [Director Garvin Recognizes National Developmental Disabilities Awareness Month](#) (email)
 - Available in [Spanish \(español\)](#)
- [Head Start Programs, Indigenous Families, and Addiction](#)
- [HHS Releases Large Scale Water Utility Affordability Survey Report as Part of the First-Ever Federal Water Assistance Program](#) (email)
- [How to Customize and Print ECLKC Pages](#) (video)
- [New Head Start Eligibility for Children in Tribal and Agricultural Programs](#) (email)
- [Office of Head Start Upcoming Events: April–June 2024](#) (email)
- [Searching for Resources, Documents, and Information on Apprenticeships in Early Care and Education](#) (email)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- [Fostering Inclusive Play for All Preschoolers](#) (video)
- [Joyful and Engaging Environments for Infants and Toddlers](#) (video)
- [Preschool iPD Learning Courses](#) (email)
 - Available in [Spanish \(español\)](#)
- [Responding to Persistent Challenging Behaviors in Preschool](#) (video)
- [What to Know About the 10% Eligibility Requirement](#)

Health, Behavioral Health, and Safety

- [Health Needs of Children Facing Rural Homelessness](#)
- [Health Professionals Working with Head Start Programs to Improve Oral Health](#) (email)
 - Available in [Spanish \(español\)](#)
- [Nutrition Services Are a Health Equity Intervention](#) (video)
- [Social and Emotional Well-being Supports and Strategies](#) (video)
- [Talking More About Marijuana with Families and Staff](#) (video)

Parent, Family, and Community Engagement

- [FAQs About Serving Families Experiencing Homelessness](#)
- [Honoring Head Start Family Services Professionals During National Social Work Month](#) (email)

Program Management and Fiscal Operations

- [Essential Strategies for Boosting Regular Attendance](#) (video)

Newsletters

- [Disabilities Services Newsletter Issue No. 77](#)
- [Resources to Make You Smile! Issue No. 37](#)
 - Available in [Spanish \(español\)](#)
- [Sesame Street in Communities Issue No. 30](#)
 - Available in Spanish (español)
- [Small Bites Issue No. 12](#)
 - Available in Spanish (español)

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Head Start Careers

- [Assistant Program Director](#) *Kansas City, MO*
- [Chief Executive Officer](#) *Warwick, RI*
- [Early Childhood Site Supervisor](#) *Waldo County, ME*

Find more [Head Start program employment opportunities](#) in the ECLKC Job Center.

Upcoming Events for April

- Thursday, April 4
 - [A Comprehensive Overview of the Updated Head Start Grant Application Instructions with Guidance](#)
 - [Highly Individualized Teaching with Infants and Toddlers](#)
- Monday, April 8: [MyPeers Orientation for ERSEA Staff](#)
- Wednesday, April 10: [4 Steps to Healthy and Safe Learning Environments](#)
- Monday, April 15: [Tools for Creating High-quality Change in Scope Applications](#)
- Monday, April 15–18: [National Head Start Conference and Expo](#)
- Thursday, April 18
 - [Supporting Early Learning with American Sign Language](#)
 - [Celebrating and Honoring Lived Experiences of LGBTQIA2S+ Parents, Families, and Staff](#)
- Monday, April 22
 - [Infant and Early Childhood Mental Health Consultation National Office Hours](#)
 - [Foundational Technical Assistance Series](#)
- Wednesday, April 24: [MyPeers Orientation for Leaders](#)

Visit the ECLKC for a full list of [upcoming events](#).

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News from OHS

- [ACF-OHS-PI-24-02 Fiscal Year 2024 \(FY 2024\) Head Start Funding Increase](#)
 - Available in [Spanish \(español\)](#)
- [Biden-Harris Administration Announces New Executive Order and Nearly \\$200M Available in Grants to Expand Registered Apprenticeships](#) (email)
- [Director Garvin Announces a Head Start Tribal Request for Information](#) (email)
- [Director Garvin Recognizes National Developmental Disabilities Awareness Month](#) (email)
 - Available in [Spanish \(español\)](#)
- [Director Khari M. Garvin Celebrates National Playground Safety Week](#) (email)
 - Available in [Spanish \(español\)](#)
- [Doctoral Dissertation Funding Opportunity: Head Start and Child Care Research](#) (email)
- [Head Start Environmental Exposure Mapping Tool](#)
- [Head Start Programs, Indigenous Families, and Addiction](#)
- [HHS Releases Large Scale Water Utility Affordability Survey Report as Part of the First-Ever Federal Water Assistance Program](#) (email)
- [Home at Head Start with Director Garvin](#) (video)
 - [A Call to Action](#)
- [How to Customize and Print ECLKC Pages](#) (video)
- [Introducing the Tribal Request for Information](#) (video)
- [National Minority Health Month: Improving Head Start Programs Through Research](#) (blog)
- [New Head Start Eligibility for Children in Tribal and Agricultural Programs](#)
 - [Letter from ACF's Principal Deputy Assistant Secretary to Tribal Leaders](#)
 - [Letter from the Director on the Changes to Eligibility Criteria for Regions XI and XII](#)
 - [Letter from the Director to MSHS Leaders](#)
- [Office of Head Start Upcoming Events: April–June 2024](#) (email)
- [Searching for Resources, Documents, and Information on Apprenticeships in Early Care and Education](#) (email)
- [Tools for Creating High-quality Change in Scope Applications](#) (video)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- [African American Boys' Journey to School Readiness](#) (videos)
 - [Part 1](#)
 - [Part 2](#)
 - [Part 3](#)
- [Fostering Inclusive Play for All Preschoolers](#) (video)
- [How Social Interactions Build Brains for Language Learning](#) (video)
- [Joyful and Engaging Environments for Infants and Toddlers](#) (video)
- [Preschool iPD Learning Courses](#) (email)
 - Available in [Spanish \(español\)](#)
- [Promoting Problem-solving Skills in Young Children](#) (video)
- [Responding to Persistent Challenging Behaviors in Preschool](#) (video)

- [What to Know About the 10% Eligibility Requirement](#)

Health, Behavioral Health, and Safety

- [Adult Recess](#) (videos)
 - [A Walk in the Woods](#)
 - [Night at the Museum](#)
 - [Number 1 Fan](#)
 - [Up, Down, Stop, Go](#)
- [Health Needs of Children Facing Rural Homelessness](#)
- [Health Professionals Working with Head Start Programs to Improve Oral Health](#) (email)
 - Available in [Spanish \(español\)](#)
- [Hearing Screening Fact Sheet](#) (email)
- [Improving Oral Health Literacy Brightens Children's Smiles](#) (video)
- [Nutrition Services Are a Health Equity Intervention](#) (video)
- [Optotype-based Vision Screenings](#)
- [Social and Emotional Well-being Supports and Strategies](#) (video)
- [Recognizing Black Maternal Health Week 2024](#) (email)
- [Talking About Marijuana with Families and Staff](#) (email)
- [Talking More About Marijuana with Families and Staff](#) (video)
- [Understanding Trauma and Healing in Adults](#)
- [Vision Screening for Young Children](#)
- [Vision Screening Referrals](#)

Parent, Family, and Community Engagement

- [Caring Conversations About McKinney-Vento Eligibility](#)
- [FAQs About Serving Families Experiencing Homelessness](#)
- [Honoring Head Start Family Services Professionals During National Social Work Month](#) (email)
- [Overview of the Family Services Role in Head Start Programs](#)
 - [How to Use the Overview by Role](#)
 - [Staff Who Work with Families](#)
 - [Managers and Supervisors Supporting Family Services Staff](#)
 - [About Head Start Programs and the Family Services Role](#)
 - [The Foundations of Family Engagement](#)
 - [Building Relationships and Partnerships with Families](#)
 - [On-the-Job Roles and Responsibilities](#)
 - [Outreach and Recruitment](#)
 - [Enrollment and the Family Partnership Process](#)
 - [Goal-setting with Families](#)
 - [Community Partnerships and Engagement](#)
 - [Closing Thoughts](#)

Program Management and Fiscal Operations

- [Essential Strategies for Boosting Regular Attendance](#) (video)

Newsletters

- [Disabilities Services Newsletter Issue No. 78](#)
- [Resources to Make You Smile! Issue No. 38](#)
- [Sesame Street in Communities Issue No. 31](#)

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Head Start Careers

- [Budget Analyst and Financial Systems Specialist](#) Yuma, AZ
- [Early Head Start Center Manager](#) Lynchburg, VA
- [Off Site Education Coordinator](#) Auburn, NY

Find more **[Head Start program employment opportunities](#)** in the ECLKC Job Center.

Upcoming Events for May

- Wednesday, May 1: [Marketing 101 for Head Start Personnel](#)
- Thursday, May 2
 - [Using a Trauma-informed Lens to Address Children's Behavior](#)
 - [Highly Individualized Teaching and Learning in Preschool](#)
 - [MyPeers Orientation](#)
- Monday, May 6: [Applying for a CDA Assessment in Another Language](#)
- Tuesday, May 7: [Resources to Connect Head Start and Refugee Resettlement Agencies: Welcoming Families New to the United States](#)
- Tuesday, May 7–9
 - [2024 International Early Childhood Inclusion Institute](#)
 - [Home at Head Start Institute 2024](#)
- Wednesday, May 8
 - [Summer Garden Storytime](#)
 - [Building Positive and Engaging Relationships with Families](#)
- Thursday, May 9: [Putting Your Family Engagement Data into Action](#)
- Tuesday, May 14–15: [The Future of ERSEA in Head Start Programs](#)
- Wednesday, May 15: [Developing Strategies to Restore Calm for Adults](#)
- Thursday, May 16
 - [Head Start Birthday Party at the Smithsonian National Zoo](#)
 - [Supporting the Dreams of Black Boys and Their Families](#)
- Sunday, May 19–22: [2024 ChildCare Aware of America Symposium and Annual Meeting](#)
- Tuesday, May 21: [The Leader's Role in Disrupting Ableism as a Form of Bias](#)
- Tuesday, May 21–23: [Virtual Health and Mental Health Leaders Institute](#)
- Wednesday, May 22: [Tribal RFI Informational Listening Session for AIAN Head Start Programs](#)
- Thursday, May 23
 - [Emergency Planning and Preparation](#)
 - [Creating Environments of Hope and a Home for Hispanic Children and Families in Head Start Programs \[in Spanish\]](#)
- Tuesday, May 28: [Including Children with Autism Spectrum Disorder, Part 1](#)
- Thursday, May 30: [MyPeers Orientation](#)

Visit the ECLKC for a full list of [upcoming events](#).

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Changes to Head Start Eligibility Criteria for Regions XI and XII

Dear colleagues,

Over the weekend, the President signed a fiscal year 2024 (FY24) spending bill. It funds Head Start programs through the remainder of the fiscal year with additional funds for a Cost of Living Adjustment (COLA). It also changes eligibility criteria for Regions XI and XII — our American Indian and Alaska Native (AIAN) and Migrant and Seasonal Head Start (MSHS) grant recipients. We celebrate this change alongside Head Start grant recipients, as the Administration, in partnership with so many of our AIAN and MSHS partners, has worked tirelessly to support this change for years.

The language in the FY24 spending bill expands opportunities for AIAN and MSHS programs to more effectively serve the families that they were designed to serve:

- Tribal programs will now have the discretion to consider eligibility regardless of income. AIAN programs can use their selection criteria to enroll children who would benefit from Head Start services but do not meet income eligibility requirements. This selection criteria may include prioritizing children in families in which a child, family member, or member of the household is a member of an Indian tribe.
- This bill also allows MSHS programs to serve any child who has at least one family member whose income comes primarily from agricultural employment as defined in the Migrant and Seasonal Agricultural Protection Act. It also renders children and families in this category eligible for Head Start services regardless of their total family income. MSHS programs are still required to develop selection criteria to prioritize the children of migrant farmworker families and to serve children who would benefit most from their services.

You can find the specific language that addresses Head Start eligibility in the [FY24 spending bill](#). These provisions go into effect immediately, however, no child who is currently served in AIAN and MSHS programs should have their enrollment disrupted to accommodate new enrollees who may qualify based on these provisions. The Office of Head Start will release additional guidance soon and will continue to work with all programs to implement these changes.

Thank you for the work you do on behalf of children and their families. I look forward to our continued partnership.

/ Khari M. Garvin /
Khari M. Garvin

Director

Office of Head Start

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).

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Biden-Harris Administration Announces Two Head Start Changes to Serve More Children in Tribal Communities and Children of Agricultural Workers

On March 23, 2024, President Biden [signed into law provisions](#) giving Head Start programs additional flexibility to serve children in Tribal communities and children of farmworkers. Both of these new provisions ensure Head Start programs can more effectively serve the families for whom they were designed. First, Tribally run Head Start programs will be able to prioritize enrolling children from the Tribe, or who live with Tribal members, regardless of family income. This change will allow Tribal Head Start Programs—which are a precious source of child care and Native language preservation in hundreds of Native communities—to grow to meet the existing demand in their communities without losing federal funding eligibility. In addition, any child who has at least one family member primarily engaged in agricultural employment is now eligible for Migrant and Seasonal Head Start.

“The Biden-Harris Administration fought for these important changes alongside many Tribal Nations, agricultural community members, and program administrators,” said U.S. Department of Health and Human Services Secretary Xavier Becerra. “We are grateful to these leaders for raising this important issue and working with us to see it become law. We will work closely with our Tribal partners and with community organizations supporting farmworkers and their families to implement these important changes.”

The change to Tribal Head Start requirements is designed to strengthen the nation-to-nation relationship between the federal government and Tribal Nations and ensure that Tribes have flexibility and decision-making power to determine how they deliver services in their communities. This aligns with the [Executive Order](#) on Reforming Federal Funding and Support for Tribal Nations to Better Embrace Our Trust Responsibilities and Promote the Next Era of Tribal Self-Determination, signed by President Biden on December 6, 2023.

The Migrant and Seasonal Head Start program serves children of farmworker families. The program is designed around the unique needs of families that change geographic locations for agricultural work or engage in seasonal agricultural labor. Its design includes elements vital to farmworkers with young children, such as months of service scheduled around harvest seasons, longer operating hours and weeks to accommodate families working in the fields, and dual language services.

“These policy changes will better target Head Start services to children in Tribal communities and children of farmworkers,” said Principal Deputy Assistant Secretary, performing the delegable duties of the Assistant Secretary of the Administration for Children and Families (ACF), Jeff Hild. “ACF is committed to ensuring that children of Tribal Nations, Native communities and migrant and seasonal workers, including farmworkers, obtain the early education and comprehensive services offered in Head Start.”

“This flexibility in Tribal Head Start will increase the number of children in Tribal communities that engage in Native language and culture during their formative years,” said Khari Garvin, Director of the Office of Head Start. “Moreover, this change to Migrant and Seasonal Head Start will ensure that the program can focus on its mission of serving children of farmworkers and providing them with a safe and healthy learning environment.”

The Administration for Native Americans Commissioner Patrice Kunesh added, “As a parent whose children attended Head Start programs, I know how important it is to families and communities that children are cared for and educated in a positive and encouraging learning environment where culture, language, and traditions are respected.”

The new policies are effective immediately. ACF will issue policy guidance for programs to support swift implementation.

Find out more about Head Start eligibility on the [ACF website](#).



Happy Birthday, Head Start Program!

Dear Head Start community,

Join us during the month of May as we celebrate 59 years of heart work with the Office of Head Start!

Over the past year, we've made tremendous progress toward our OHS priorities of ensuring child health and safety, partnering with state systems, reaching children and families, investing in the workforce, and strengthening quality environments. Highlights include:

- Releasing the Notice of Proposed Rule Making on Supporting the Head Start Workforce and Consistent Quality Programming, and receiving and reviewing your comments
- Relaunching the Head Start Fellows program
- Expanding the Tribal Colleges and Universities-Head Start Partnership Program
- Supporting Head Start grant recipients with implementing strategies to achieve full enrollment
- Increasing enrollment flexibility for Tribal communities and farmworker families
- Renewing the joint Policy Statement on the Inclusion of Children with Disabilities in Early Childhood Programs from the U.S. Department of Health and Human Services and the Department of Education

The success of the Head Start program is only possible through the dedication of staff, from the most senior manager all the way to the newest family services worker. There are so many who play pivotal roles in the impact of Head Start programs across the nation and U.S. territories.

As we celebrate the Head Start program's 59th birthday, I encourage you to not only reflect on our rich past but look to the year ahead. Consider what things you might do, big or small, to increase the effect of your critical Head Start role as we continue to serve the children and families who need us most.

Join us in publicly celebrating our birthday a day early, on Friday, May 17! It is easy to share the social media messages and graphics found in the [OHS 59th Birthday Celebration Digital Toolkit](#). Show us how your program celebrates by posting pictures and videos using **#HappyBdayHeadStart** and **#CelebratingHeadStart**. Tag **@HeadStartgov** so we can share them across our OHS social media channels!

Happy birthday, Head Start program!

/ Khari M. Garvin /

Khari M. Garvin
Director
Office of Head Start



Strategies to Promote the Mental Health and Well-being of Children, Families, and the Early Care and Education Workforce

Today, the Office of Early Childhood Development (ECD) is excited to announce the release of [new policy guidance](#) for states, tribes, territories, and local early childhood programs to promote the mental health and wellness of children, families, and the early care and education workforce. These resources are part of the Biden-Harris Administration's priority to address the mental health crisis, and build on the [HHS Roadmap for Behavioral Health Integration](#), an effort to integrate the full spectrum of behavioral health care into early childhood systems to ensure all people have equitable access to evidence-based, culturally appropriate, person-centered care.

These four new Information Memoranda (IMs) recommend strategies to advance mental health promotion in the Child Care and Development Fund, Head Start, Preschool Development Grant Birth Through Five, and Tribal Home Visiting programs. They provide a range of actionable recommendations, resources, and strategies to promote healthy child development and to integrate mental and behavioral health supports into early care and education programs.

ECD's Behavioral Health [webpage](#) has additional information and resources, including a brief [Executive Summary](#) that provides highlights of the policy guidance documents. **Today, we are hosting a webinar at 3 p.m. ET** in honor of Children's Mental Health Awareness Day where you can learn more about the policy guidance and hear directly from states, tribal communities, and local programs about how they are leveraging partnerships, implementing innovative practices, and leading efforts to promote child, family, and workforce wellness. We hope you will join us.

With gratitude,

/ Katie Hamm /

Katie Hamm
Deputy Assistant Secretary
Office of Early Childhood Development

/ Khari M. Garvin /

Khari M. Garvin,
Director
Office of Head Start

/ Dr. Ruth Friedman /

Dr. Ruth Friedman
Director
Office of Child Care



Dear Head Start community,

The month of May is an exciting time for the Office of Head Start (OHS) as we celebrate 59 years of *heart work* in our communities; thank our teachers for their dedication to the children and families they serve; and focus attention on mental health for children, families, and staff.

The Head Start program is at a critical point — a message I continue to hear as I speak to Head Start and Early Head Start program staff and directors every where I travel. Stabilizing the workforce and supporting mental health are both urgent priorities nearly every program is addressing in order to help children thrive. This Teacher Appreciation Week, I can't help but reflect on the high staff turnover rates in Head Start and how programs are increasingly losing teachers to other employers in their communities because they cannot provide competitive compensation.

The Office of Head Start and, more broadly, the Biden-Harris Administration, is committed to changing that. In October 2023, OHS issued a Notice of Proposed Rule Making (NPRM), [Supporting the Head Start Workforce and Consistent Quality Programming](#). We proposed benchmarking Head Start educator wages to preschool teachers in public schools, which we estimate will raise teacher salaries by an average of \$10,000 a year. The proposed wage increases would support the dedicated Head Start workforce in staying committed to the challenging, yet rewarding, jobs of supporting the children and families who need them. The proposed wage increases also honor our commitment to equity for a workforce that is largely made up of women of color. In addition, we proposed a set of comprehensive benefits for all full-time Head Start staff. With higher wages and more robust benefits, programs would be able to attract and retain highly credentialed staff, reversing trends of high turnover and supporting Head Start programs' ability to consistently provide high-quality services to children and families. We also proposed other changes to support the workforce, enhance mental health services, improve program environments, and ensure Head Start programs effectively and equitably meet the evolving needs of communities across the country.

When we issued our proposal, we simultaneously asked for your feedback. Over the course of several webinars and seven round table conversations with program staff across the country, we heard your first impressions, your deep concerns, and the excitement that we were finally addressing these issues in regulation. We encouraged every interested party to submit their feedback officially to the Federal Register, because our proposal was only the first step in developing the revised regulations.

In January 2024, the Office of Head Start received about 1,300 comments on the NPRM. Similar to our round table conversations, we heard excitement for change and expressions of support for our shared goals for the Head Start workforce. But, we also heard several themes in the concerns raised by the public, including the projected impact on small, rural, and tribal programs, reduced flexibility, and the need for additional funding to offset costs.

We've taken your feedback seriously! In each section of the proposed rule, we are looking to the comments we received to inform what the final rule should be. Head Start staff, parents, and families have always been the cornerstone of our program, and staff, parent and family engagement in policymaking is an important part of what makes Head Start programs successful.

So, Happy Teacher Appreciation Week! Feel free to check out [my video thanking teaching staff](#) for their dedication and service. But more importantly, I hope you truly understand our commitment to increasing compensation for our Head Start educators and other staff who perform highly skilled work. Now is the time to strengthen Head Start!

Thank you for the work you do every day on behalf of children and families.

Sincerely,

Khari M. Garvin
Director
Office of Head Start

MEALS SERVED TO CHILDREN IN HEAD START & EARLY HEAD START 12 Month Summary Report

Children that eat 2 meals and a snack at Head Start/ Early Head Start receives
1/2 to 2/3 of their daily nutritional needs.

Month	Breakfast	Lunch	Snack	Monthly Total
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
January-24	2760	2832	3653	9245
February-24	2937	2901	3461	9299
March-24	2444	2428	3164	8036
YEARLY TOTALS	27045	27106	34659	88,810

MEALS SERVED TO CHILDREN IN HEAD START & EARLY HEAD START 12 Month Summary Report

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October-23	3069	3074	4035	10178
November-23	2469	2362	3176	8007
December-23	1961	1913	2341	6215
January-24	2760	2832	3653	9245
February-24	2937	2901	3461	9299
March-24	2444	2428	3164	8036
April-24	3161	3175	4218	10554
YEARLY TOTALS	27771	27871	35491	91,133

February 2024 HEAD START TIME & ATTENDANCE REPORT

As of 2/29/24	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	16		16			0	16	0		16		16	87.5%
Antlers 2			0			0	0	0		0			
Battiest	9	1	10	1	1	2	8	1	2/6/2024	9	4	16	86.1%
Boswell 1	11		11	2		2	9	0		9	4	16	93.1%
Boswell 2	10		10	6		6	4	0		4	3	16	92.2%
Broken Bow 1	20		20	3		3	17	0		17		17	89.3%
Broken Bow 3	14		14	2		2	12	0		12		18	87.5%
Clayton 1	15	1	16	1		1	15	0		15	4	16	91.1%
Clayton 2	10		10	1		1	9	0		9	2	16	95.1%
Forest Grove 1	13		13	2		2	11	0		11	5	15	76.4%
Forest Grove 2	18	1	19	2		2	17	0		17	8	15	84.9%
Fort Towson	12		12	4		4	8	0		8	4	15	87.5%
Haworth	12	1	13	1		1	12	0		12	2	12	81.9%
Horace Mann 1	13		13	1		1	12	0		12		16	84.4%
Horace Mann 2	14		14	1		1	13	0		13	4	16	88.9%
Horace Mann 3	15		15	1	1	2	13	1	2/16/2024	14		16	82.9%
Hugo 2	7	1	8	1		1	7	0		7		16	80.4%
Hugo 4	10		10	1		1	9	0		9		16	72.9%
Idabel 1	11		11			0	11	0		11		18	69.7%
Idabel 2	7	4	11			0	11	0		11		18	79.4%
Idabel 3	15	1	16	3	1	4	12	1		13		18	90.0%
Rattan 1	14	1	15	2		2	13	0		13	3	15	93.4%
Rattan 2	3		3			0	3	0		3	3	17	96.1%
Rattan 3	8		8	1		1	7	0		7	2	17	91.6%
Soper 1	14	1	15	2		2	13	0		13	6	19	89.1%
Soper 2	22		22	3		3	19	0		19	10	19	93.9%
Valliant 1			0			0	0	0		0			
Valliant 2	14	1	15	2		2	13	0		13		18	89.0%
TOTALS	327	13	340	43	3	46	294	3		297	64		86.8%

March 2024 HEAD START TIME & ATTENDANCE REPORT

As of 3/31/24	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	16		16		3	3	13	3	3/26/2024	16		12	90.5%
Antlers 2			0			0	0	0		0			
Battiest	10		10	2		2	8	0		8	4	12	85.4%
Boswell 1	11		11	2		2	9	0		9	4	12	89.8%
Boswell 2	10	1	11	6		6	5	0		5	3	12	81.4%
Broken Bow 1	20		20	3		3	17	0		17		15	87.5%
Broken Bow 3	14		14	2		2	12	0		12		14	86.9%
Clayton 1	16		16	1	1	2	14	1	3/6/2024	15	3	12	83.0%
Clayton 2	10		10	1		1	9	0		9	2	12	88.9%
Forest Grove 1	13		13	2		2	11	0		11	6	12	82.6%
Forest Grove 2	19		19	2		2	17	0		17	8	12	82.8%
Fort Towson	12		12	4		4	8	0		8	4	12	78.1%
Haworth	13		13	1	1	2	11	1	3/6/2024	12	2	12	91.9%
Horace Mann 1	13		13	1		1	12	0		12		12	91.0%
Horace Mann 2	14		14	1		1	13	0		13	4	12	93.0%
Horace Mann 3	15		15	2		2	13	0		13		12	90.4%
Hugo 2	8		8	1		1	7	0		7		12	94.1%
Hugo 4	10		10	1	1	2	8	1	3/4/2024	9	1	12	83.5%
Idabel 1	11	1	12		1	1	11	1	3/4/2024	12		15	71.8%
Idabel 2	11		11		2	2	9	2	3/12/2024	11		15	81.5%
Idabel 3	16	1	17	4	1	5	12	1	3/25/2024	13		15	84.2%
Rattan 1	15		15	2		2	13	0		13	4	12	98.1%
Rattan 2	3		3			0	3	0		3	3	12	83.3%
Rattan 3	8		8	1	1	2	6	1	3/1/2024	7	2	12	90.3%
Soper 1	15	1	16	2	1	3	13	1	3/26/2024	14	5	16	90.5%
Soper 2	22		22	3		3	19	0		19	10	16	91.8%
Valliant 1			0			0	0	0		0			
Valliant 2	15	1	16	2	1	3	13	1	3/4/2024	14		12	91.7%
TOTALS	340	5	345	46	13	59	286	13		299	65		87.5%

February 2024 Pre-K TIME & ATTENDANCE REPORT

As of 2/29/24	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	1		1	3	16	95.8%
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	1	0	1	3		92.7%

March 2024 Pre-K TIME & ATTENDANCE REPORT

As of 3/31/24	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	1		1	3	12	86.1%
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	1	0	1	3		86.1%

February 2024 EHS Time and Attendance												
As of 2/29/24	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	56	2	58	33	3	36	22	1	3	2/23/2024	19	80.6%
Hugo	28	2	30	16	4	20	10	1	4	2/23/2024	19	82.4%
Idabel	29	1	30	20	2	22	8	2	2	2/16/2024	19	68.7%
TOTALS	113	5	118	69	9	78	40	4	9			78.6%

2 of the drops are transfers to AN EHS

March 2024 EHS Time and Attendance												
As of 3/31/24	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	58	1	59	36	1	37	22	1	1	3/11/2024	16	87.3%
Hugo	30	1	31	20		20	11	1	0		16	84.9%
Idabel	30	3	33	22		22	11	2	0		16	76.9%
TOTALS	118	5	123	78	1	79	44	4	1			84.4%

February 2024 EHS-CC Time and Attendance												
As of 2/29/24	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	18	1	19	10	3	13	6		3	2/28/2024	19	77.6%
ELC-Broken Bow	44	1	45	30	2	32	13	1	2	2/28/2024	19	76.3%
ELC-Hugo	17		17	10	1	11	6		1	2/2/2024	19	79.3%
ELC-Idabel	40	3	43	27		27	16	3	0		19	80.8%
Cabbage Patch	35	4	39	18	2	20	19	5	2	2/16/2024	20	88.1%
The LearningTree	80	2	82	42		42	40	1	0		20	83.8%
TOTALS	234	11	245	137	8	145	100	10	8			82.4%

2 drops transferred to Cabbage Patch

1 drop transferred to Learning Tree

1 drop transferred to AN ELC

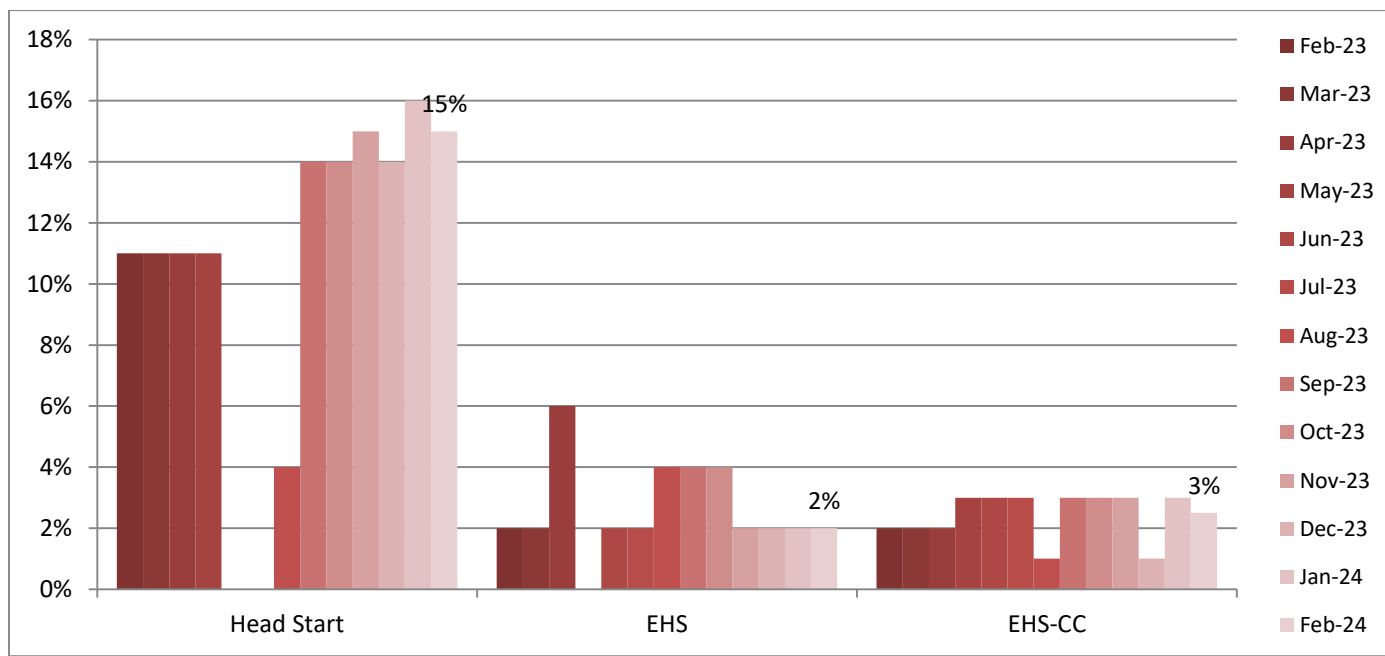
March 2024 EHS-CC Time and Attendance												
As of 3/31/24	ENROLLED			DROPPED								ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Dropped	Monthly Drop	YTD Drop	Currently Enrolled	AI	30 Day Count	Date Dropped	Kid Days	Monthly ADA
ELC-Antlers	19	2	21	13		13	8		0		16	89.8%
ELC-Broken Bow	45	3	48	32		32	16	1	0		16	89.2%
ELC-Hugo	17	2	19	11		11	8		0		16	83.3%
ELC-Idabel	43		43	27		27	16	3	0		16	91.4%
Cabbage Patch	39	7	46	20	2	22	24	4	2	3/26/2024	20	89.3%
The LearningTree	82	1	83	42	5	47	36	1	5	3/26/2024	21	82.6%
TOTALS	245	15	260	145	7	152	108	9	7			86.5%

Data Analysis Report Summary

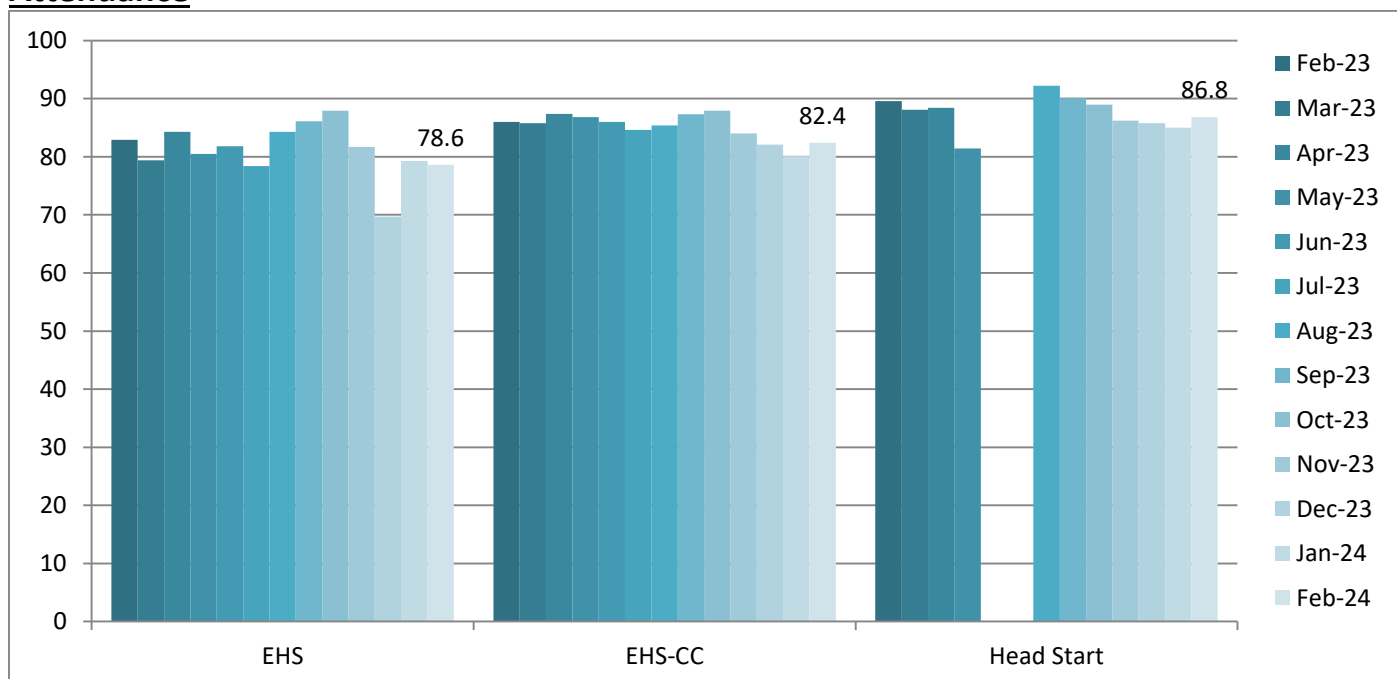
February 2024

Disabilities

IEP/IFSP –

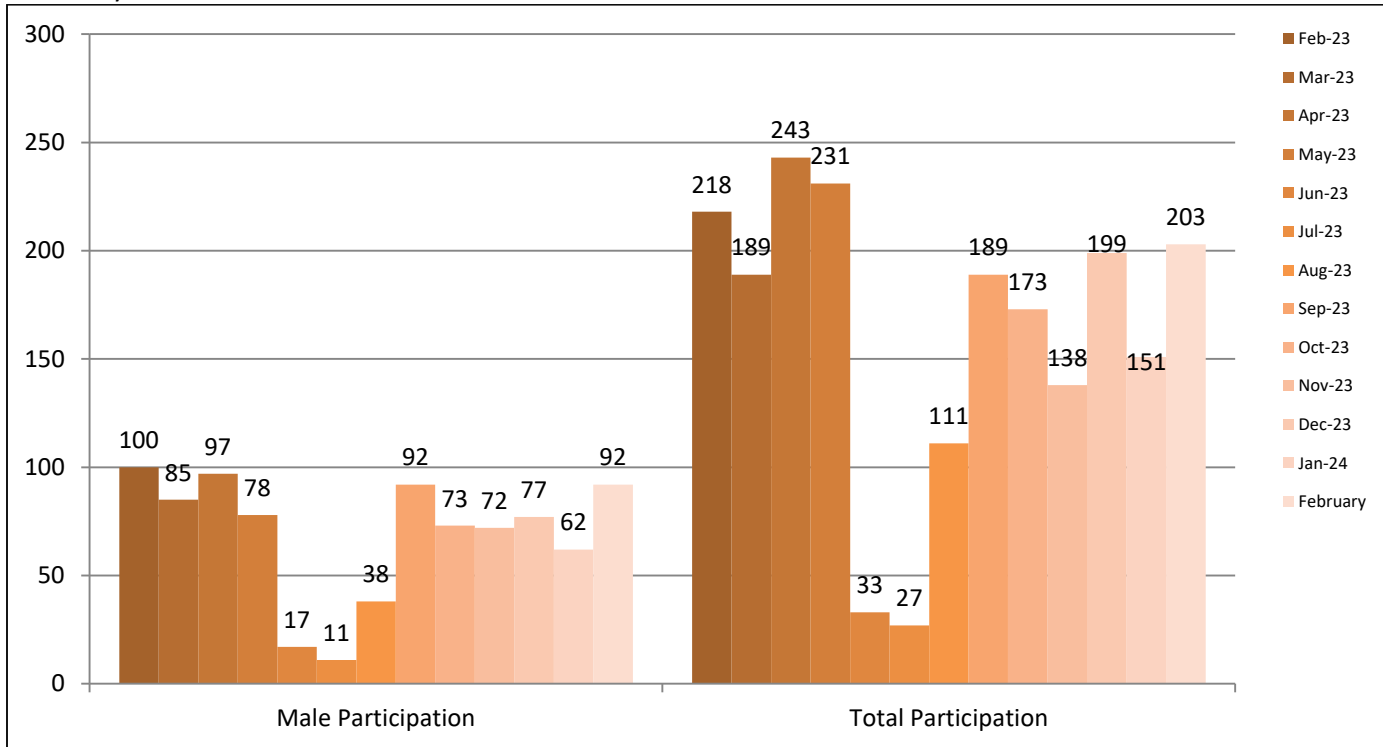


Attendance

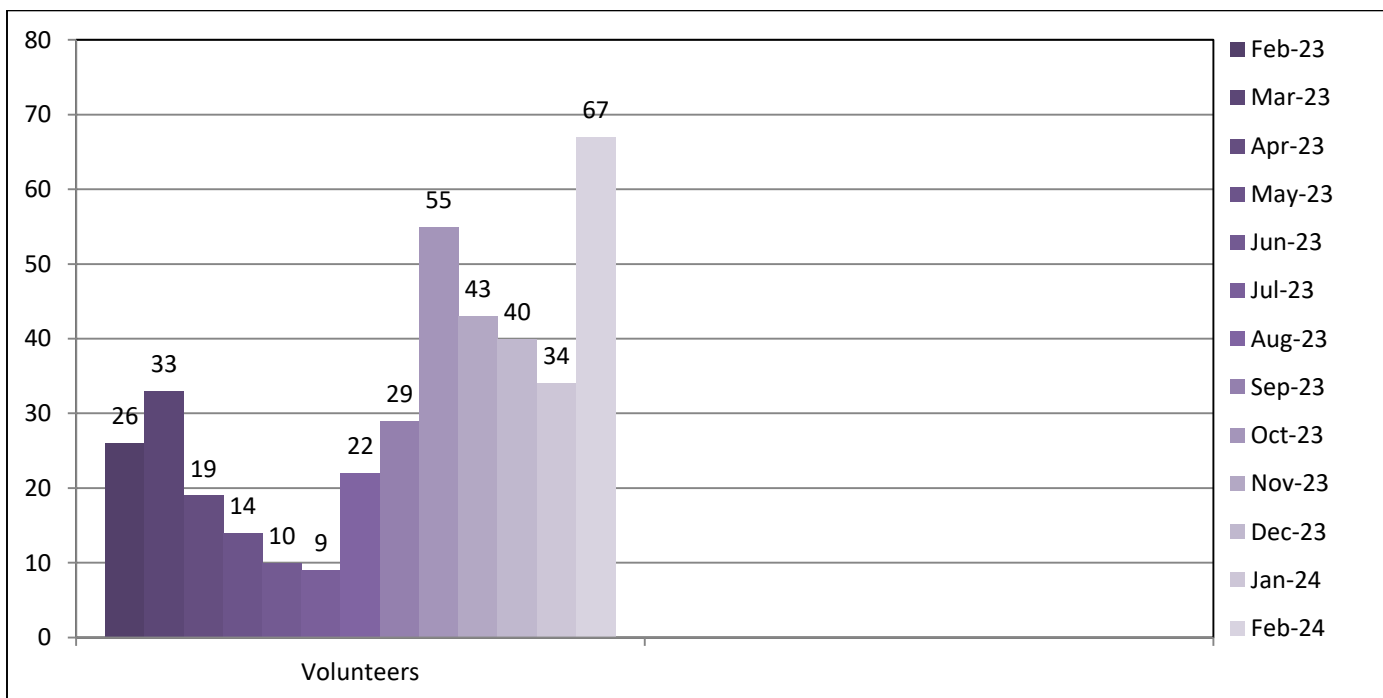


Family & Community Engagement

Dad's Day



Parents Ready to Read

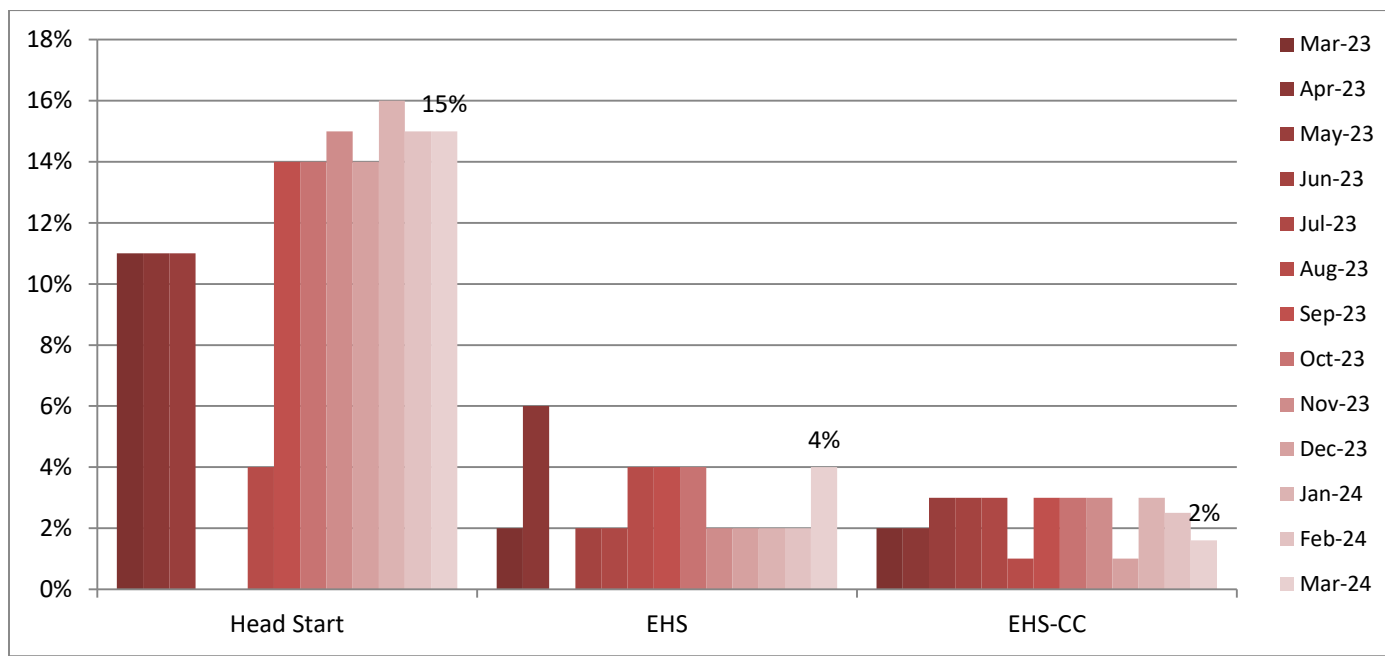


Data Analysis Report Summary

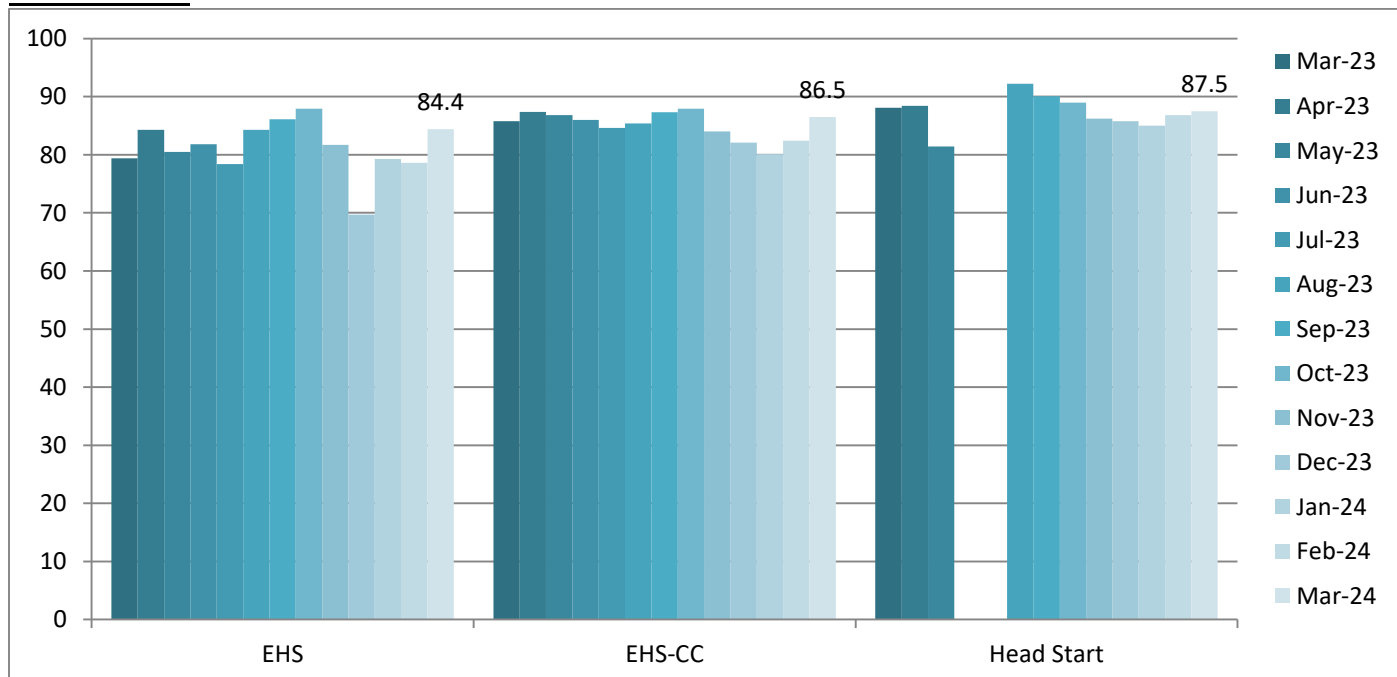
March 2024

Disabilities

IEP/IFSP –

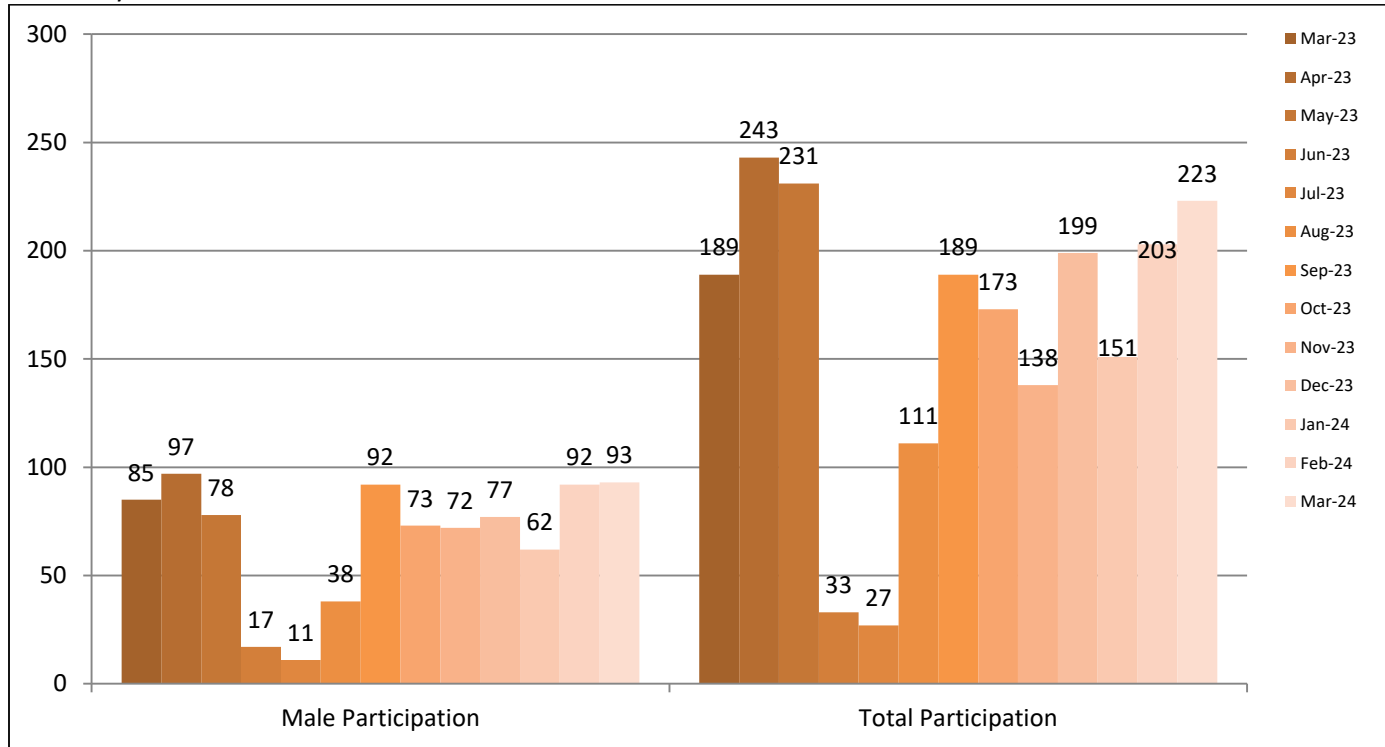


Attendance

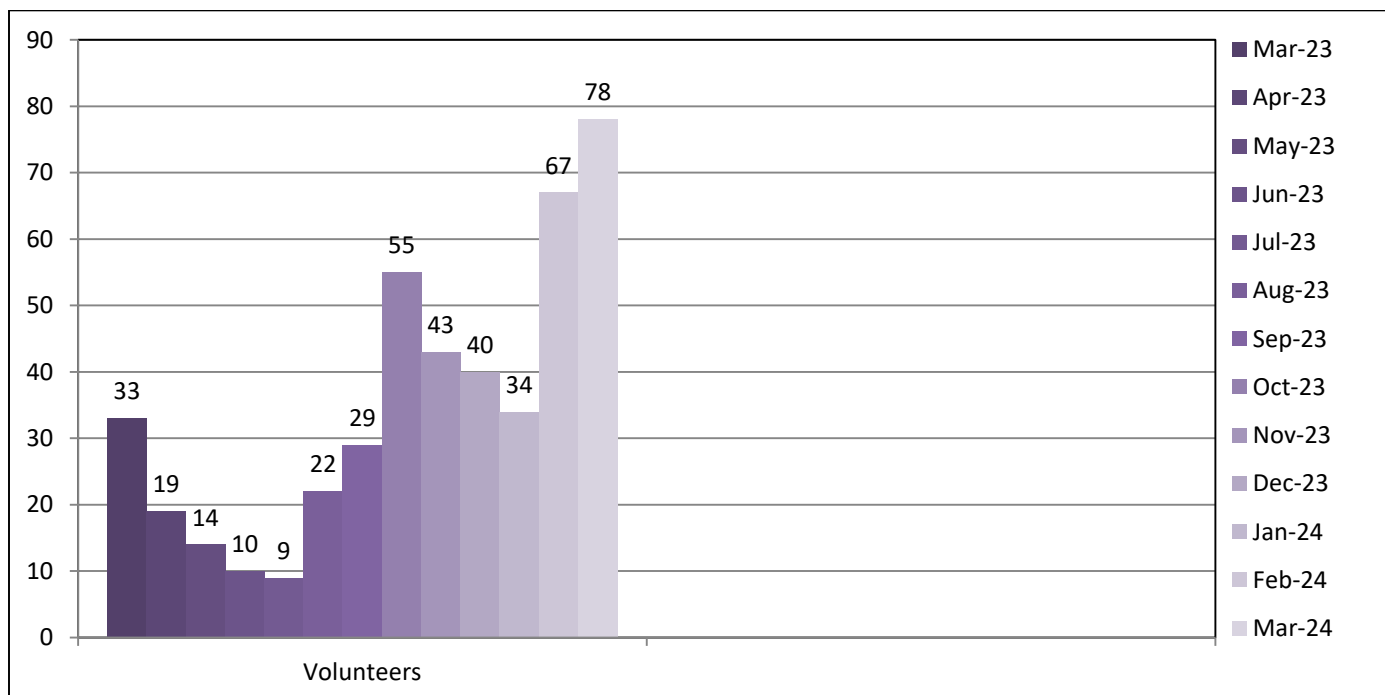


Family & Community Engagement

Dad's Day



Parents Ready to Read





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

March 18, 2024

Ms. Becky Reynolds, Executive Director
LIFT Community Action Inc.
209 North 4th Street
Hugo, Oklahoma 74743

RE: 18806 CSBG 23; 19117 CSBG 23 Discretionary; 19203 SAF/CAA 24 and 19232
SAF/CAA-HS 24

Dear Ms. Reynolds:

Please note that a virtual comprehensive monitoring of the above programs administered through the Oklahoma Department of Commerce, has been scheduled for June 17-28, 2024. The monitoring will include a review of your personnel files, Board of Director's files and interviews, CONFAX, financial records and fiscal policies and procedures, contract files, ROMA implementation, organizational standards and a review of inventory items.

To ensure an accurate review of documentation and to facilitate the monitoring process, please email Sarah Rodefeld a copy of your most current Board Roster, a list of employees by department/division and a list of key staff members with email addresses that will be providing information and attending virtual meetings by May 23, 2024. We realize that these may already be on file, ODOC wants to ensure correct documentation is requested and reviewed during the monitoring process. Once the documents have been reviewed, you will receive an email with a link to a cloud-based records upload system and instructions on how to begin uploading documents for the review.

A virtual entrance interview to detail the monitoring activities will be held June 17, 2024, at 9 a.m. An invitation for the meeting will be sent prior to the entrance meeting. A virtual exit conference will be held once the monitoring is complete. It is important that you personally attend the exit conference, as well as a board representative. Feel free to invite agency staff to the exit interview as you see necessary.

Please contact Sarah Rodefeld at 405-243-0312 or Sarah.Rodefeld@okcommerce.gov should you have questions or concerns.

Sincerely,

A handwritten signature in black ink, appearing to read "Alicia Hibbets", written over a light blue horizontal line.

Alicia Hibbets, Director of Programs – Monitoring
Community Development Division



Office of Juvenile Justice and Delinquency Prevention Opioid Affected Youth Initiative Site Visit Report

Site Location: Hugo, Oklahoma	Report Date: 4/25/24
Lead Agency: Lift Community Action Agency Project Name: Better Choices; Better Futures	Date of Site Visit: 2/25/24
Point(s) of Contact: Dionne Frankum, Project Director Kathy James, Grants Manager	Institute for Intergovernmental Research (IIR) Technical Assistance (TA) Team: Carol P. Gordon, Senior Research Associate Celeste Wojtalewicz

Background

Lift Community Action Agency has been established since the late 1960s and was rebranded in 2021, shifting its mission to guide those in need toward building self-sufficiency, consistent with its role as an organization that meets identified needs “from birth to grave.” Lift has a track record of providing an array of prevention and intervention services, emergency services, economic development and self-sufficiency services, transportation services, victim advocacy services, and domestic violence support, to outline a few. There is a great deal of experience and support from the administrators of the lead agency that would include the executive director and the associate director. Between the two roles, administrators provide project oversight and ensure that the evidence-based approaches are utilized and resources are in place to address the identified needs of the project, as well as promoting the program in the community, streamlining accessibility. In the words of the executive director, “We take pride in working with youth whose families are in crisis and need prevention and intervention services, ultimately providing them with a ladder to success.” “We work to create or expand our services and programming to accommodate the defined needs,” added the associate director.

I. Core Team

Meeting Participants

- Dionne Frankum, LCSW, Project Director, Acting Site Coordinator
- Kathy James, Grants Manager
- Johnny Moffitt, Associate Director
- Rebecca Porter, Executive Director

General Comments

- New hires are actively being pursued. One of the two advocate positions has been recommended to the executive director for McCurtain County, and the other advocate will be assigned, once



identified, to Choctaw and Pushmataha Counties. The core team will be fully staffed with the hiring of the two youth family advocates, whose percentage of time in support of the initiative will be 100%, in addition to the project director, who is also serving as the acting coordinator.

Strengths

- Job description being developed; requires a review every 5 years
- Roles clearly defined
- Onboarding process in place, including review of the grant and deliverables
- Scheduling of periodic DEI training
- Components of all programs within the agency outlined, providing access to both internal and external resources
- Staff meetings scheduled regularly

Recommendations

- Provide a standing agenda for scheduled staff meetings prior to the meetings, adding subtopics as needed.

II. Coordinator/s

Meeting Participants

- Dionne Frankum
- Kathy James

General Comments

- Currently, the project director is building the infrastructure for staffing configurations, which may dictate shifting some areas of responsibility.

Strengths

- Passion, expertise, and experience of the project director in working with adult females and males, at-risk youth populations, certifications, and licensure
- Passion and ability to lead and articulate directives; flexibility to pivot on demand

Recommendations

- Access TA from OAYI TTA provider on the development of a case management assessment tool to determine the needs of clients; tracking and monitoring system for case managers.
- Develop a written referral process.



III. Project Structure

Meeting Participants

- Dionne Frankum

General Comments

- The project team is actively engaged in developing the infrastructure of the project, including systems that monitor and track the deliverables.

Strengths

- Support and engagement of coalitions and other stakeholders
- Commitment of stakeholders
- Communication structure – formal and informal
- Expertise and experience of team and agency

Recommendations

- Revisit all protocols and operations and refine specific to this project
- Elevate project to ensure that coalitions are keeping the project in the forefront of its efforts
- Increase education and awareness of project components

IV. Partners

Meeting Participants

- Jessica Watts, Chair, Pushmataha Coalition
- Pam Waugh, Chair, Choctaw County Coalition

General Comments

- The partner meeting represented potential advisory members who cover the three-county target area through the coalitions.

Strengths

- Diverse representation on the coalitions (potential advisory board members), including youth and parents
- Coalitions (potential advisory board members) are County Health Improvement Organization certified, representing all 12 sectors (e.g., law enforcement and the courts, including judges and prosecutors as coalition partners)
- Open line of communication on an ongoing basis
- Experienced and seasoned coalition chair partners
- Feedback valued and utilized
- Building a sense of community engagement prioritized: “Relationships make each strong and build a stronger community”



- The project director attends all coalition meetings
- Narcan kits placed in the schools

Recommendations

- Consider engaging school representation as a coalition partner, as well as other sectors not represented, to ensure that all voices are at the table.

V. Advisory Entity

Meeting Participants (Potential Advisory Board Members)

- Mehlenie Adamson, Project Gain
- Angie Smith, Choctaw Nation Youth Advisory Board

General Comments

- Potential advisory board members are currently being engaged based on the support areas needed for the initiative, including youth programming inclusive of mentoring opportunities and youth leadership development.

Strengths

- Potential board members to be recruited who have a strong connection with youth and families
- Strong sense of understanding of how to apply trauma-informed practices and identify

Recommendations

- Access community needs assessment previously conducted by the Victim and Youth Services Program.

VI. Data Collection Process, Activities, and Practices

Meeting Participants

- Kathy James
- Dionne Frankum

General Comments

- There appears to be a solid system in place to capture and assess data. Data collection and analysis are high priorities for the team.

Strengths

- Frequency of reporting established
- Moving to a cloud-based data system to provide team access; considering use of Smartsheet
- Utilization of community surveys to inform the strategic planning process as well as activities that meet the needs. . . a very fluid process, with information coming in and going out



- Advisory board will be engaged in decision-making in identification of key data points.

Recommendations

- Consider establishing a process to implement a more formalized process to obtain feedback and perceptions from the community specific to the project at specific intervals (3 months, 6 months, etc.).
- Obtain community perception of the project.
- Access TA through the TTA provider, specifically the data and performance measures, with SMEs to ensure that types and use of data are appropriate to support the initiative and to educate stakeholders in the community.

VII. Youth/Family Served – N/A

The team did not meet with any youth and/or family being served.

Recommendations

- Ensure that programming and services provided are consistent and applicable to meet the identified needs of youth and families.
- Educate youth and families on the components of the project, and create a mechanism to ensure that expectations of the programming and services are being met.

VIII. Activity Observation

No activity was observed.

Recommendations

- Ensure that the program or activity is relevant and is adequately staffed.

IX. Closeout

Meeting Participants

- Dionne Frankum

Recommendations

- Utilize TA provided through the TTA provider to access resources and expertise in areas currently being developed.
- Be open to adding members to the potential advisory board to include more diverse stakeholders, such as the schools.



COMMUNITY CORRAL

LIFT Administration (by the post office)
209 N 4th St. Hugo, OK 74743

Round up the family and come help us
celebrate 60 years of COMMUNITY ACTION!

- Door Prizes
- Free Hot Dogs
- Bounce Houses
- Community Resources
- Promotional Giveaways
- Family Activities/Games

Friday, May 31, 2024
10:00am–2:00pm

Kick off the weekend by joining us for a
fun-filled day full of family activities,
games, and summer giveaways!

Find the event on
Facebook at
LIFT Community Corral
or scan the code-->

