



LIFT

Community Action Agency, Inc.

Board of Directors Meeting

JUNE 11, 2024 • 10:00 AM

HOMEOWNERSHIP CENTER

500 EAST ROSEWOOD - 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, June 11, 2024 · 10:00 a.m.
HomeOwnership Center · 500 East Rosewood · Hugo, Oklahoma · 74743

AGENDA

- A.** Call to Order and Invocation
- B.** Opening of Board Meeting – Roll Call, Declaration of Quorum, and Introduction of Guests
- C.** Board Training/Report: How to Interpret an Audit Report and Presentation of the 2023 LIFT CAA Audit (*Organizational Standards 5.7, 5.9 & 8.3*)
- D.** Consideration, Discussion, and Vote to Approve the 2023 LIFT CAA Audit (*OS 8.1, 8.2 & 8.4*)
- E.** Finance/Audit/Loan Committee Report

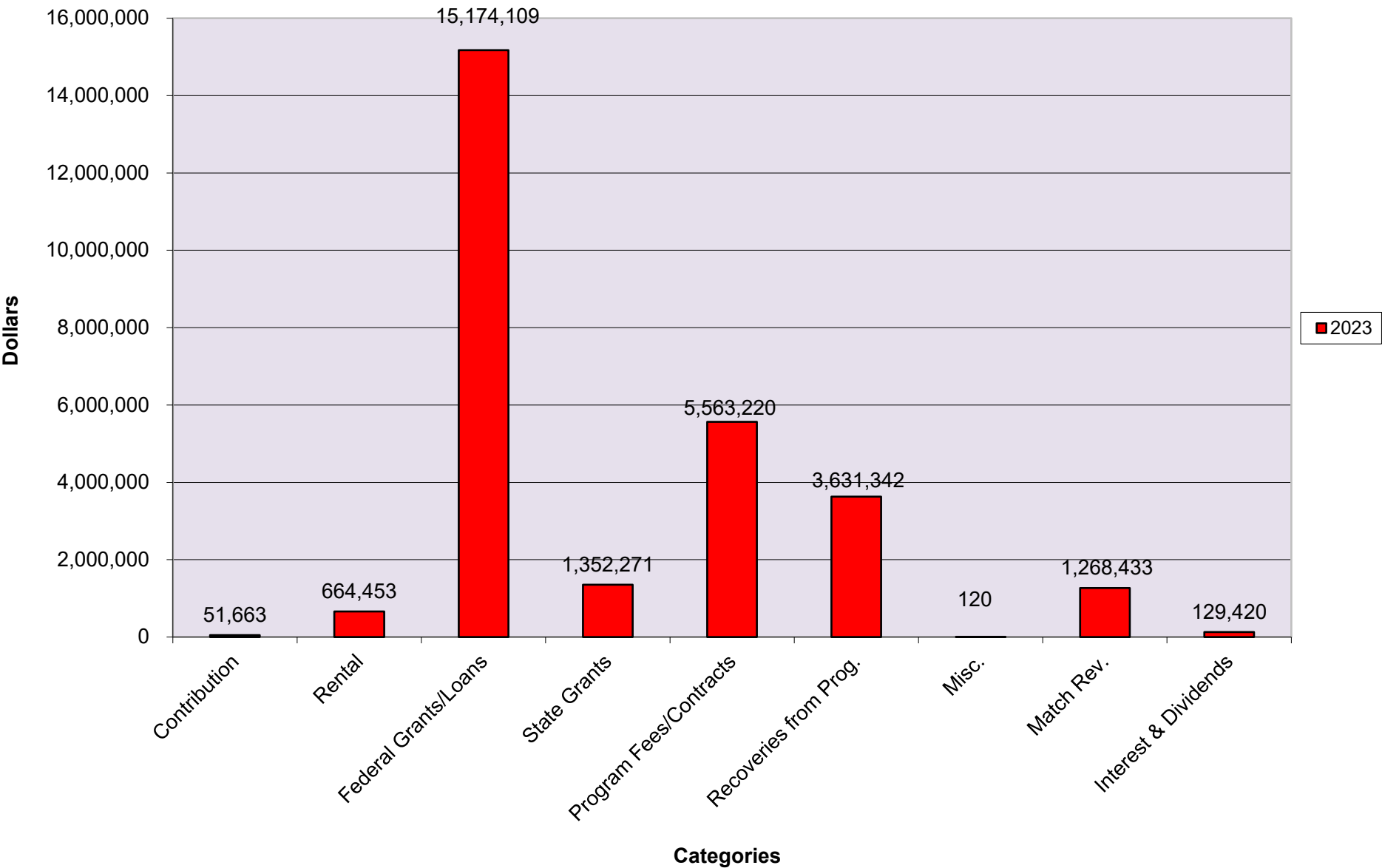
Consent Docket - *The following items of business indicated by brackets (F and G, H, I) may be voted upon by a single vote of the Board without discussion, unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.*

- F.** Consideration, Discussion, and Vote to Approve May 2024 Regular Meeting Minutes (*OS 5.5*)
- G.** Consideration, Discussion, and Vote to Approve April 2024 Financial Reports; Distribution of May 2024 Financials for July 2024 Consideration and Vote (*OS 8.7*)
- H.** Consider Submission of Resolutions/Grant Applications, Vote to Approve – **\$266,745.10**
 - 1. 2024 Oklahoma Asset Development Project Application to Oklahoma Association of Community Action Agencies - **\$5,367**
 - 2. FY 2024 Community Services Block Grant Application (4th Allocation) to Oklahoma Department of Commerce/Community Development - **\$115,169**
 - 3. FY 2024 Regional Supplemental Grant Application to NeighborWorks® America - **\$25,000**
 - 4. FY 2025 Domestic Violence/Sexual Assault Program Application to Oklahoma Office of Attorney General - **\$93,750**
 - 5. FY 2025 Base Grant Application to Oklahoma Court Appointed Special Advocates (CASA) Association - **\$27,459.10**
- I.** Consider Acceptance of Grants/Contracts/Awards, Vote to Approve – **\$531,864**
 - 1. 2024 Oklahoma Asset Development Project Contract Award from OKACAA - **\$5,367**
 - 2. FY 2024 Expendable Grant Award from NeighborWorks® America - **\$187,000**
 - 3. FY 2024 Capital Grant Award from NeighborWorks® America - **\$75,000**
 - 4. 2024 Week of the Young Child Grant Awards (Broken Bow & Idabel Early Learning Centers) from Choctaw Nation of Oklahoma, Child Care Assistance Program - **\$1,000**
 - 5. Know and Grow Oklahoma: Building Resilient Children, Families & Communities – Family Resource Center Grant Award from Potts Family Foundation - **\$263,497**
- J.** Consideration, Discussion, and Vote to Approve Filing of LIFT CAA 2023 Form 990 and Oklahoma Tax Return (*OS 8.6*)

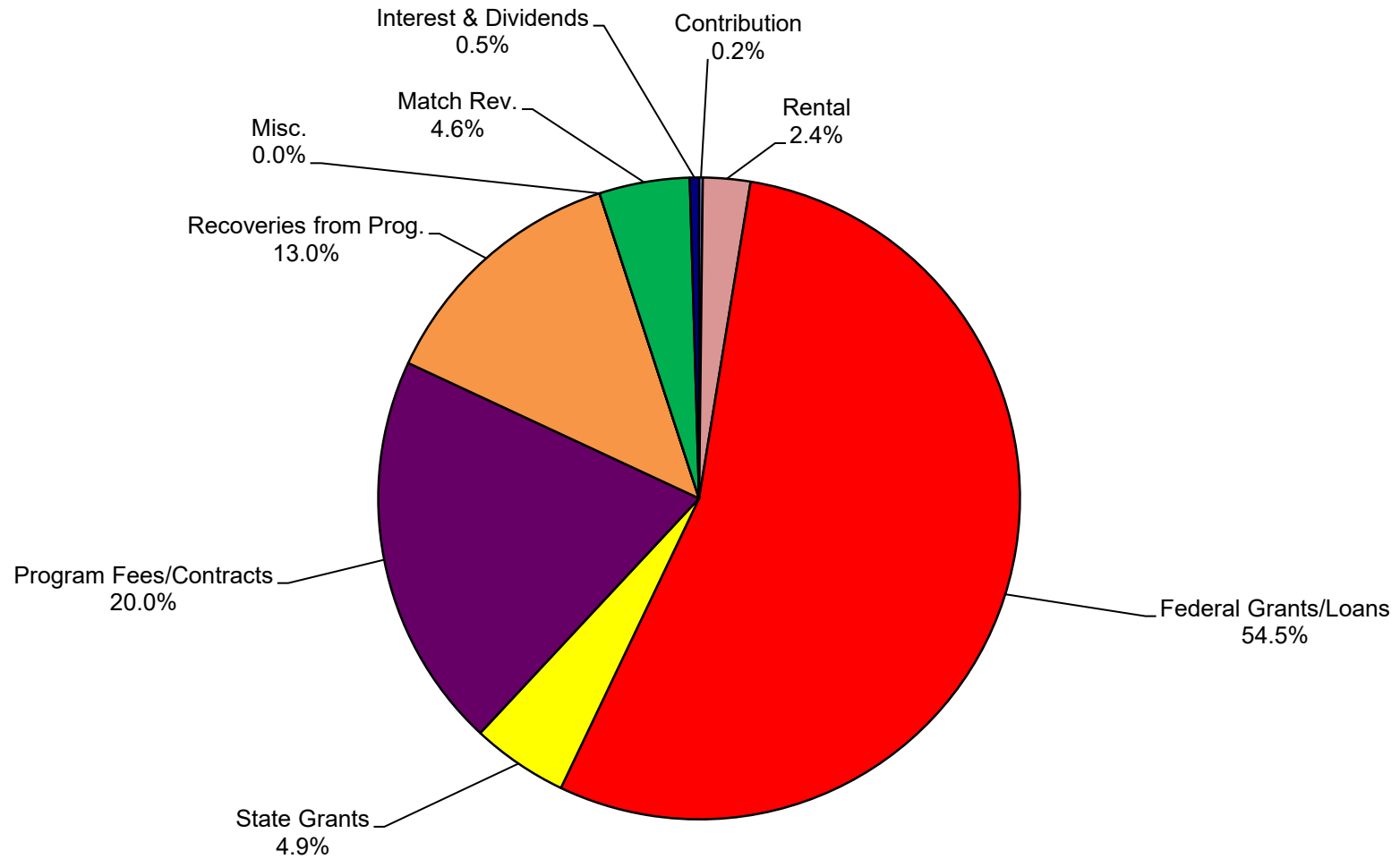
- K.** Consideration, Discussion, and Vote to Approve Submission of 2024-2025 Transportation Waiver for the Head Start Program
- L.** Consideration, Discussion, and Vote to Approve Signing of Proclamation Recognizing June 2024 as National Homeownership Month
- M.** Consideration, Discussion, and Vote to Approve FY 2025 CASA Program Goals and Objectives
- N.** Board Training: Community Needs Assessment/Survey Distribution (OS 5.7)
- O.** Board Training: National CASA Core Model and Guiding Principles (OS 5.7)
- P.** Board Training/Programmatic Report: NeighborWorks Week Presentation (OS 5.7 & 5.9)
- Q.** Board Training/Programmatic Report: Eligibility, Recruitment, Selection, Enrollment, and Attendance (ERSEA) Training on Head Start/Early Head Start/EHS-Child Care Eligibility (OS 5.7 & 5.9)
- R.** Transportation Advisory Council Report (OS 5.9)
- S.** Risk Assessment/Management Report (OS 5.9)
- T.** Policy Council Report (OS 2.1 & 5.9)
- U.** Recognition of June 2024 Employee of the Month:
Sylvia Watkins, Dispatcher/Trainer – Transit Program
- V.** Other Reports/Announcements/Correspondence: HS/EHS/EHS-CC Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Victims of Crime Act Assistance Funding Reduction Notice; NeighborWorks® America/Community Impact Information (OS 5.9)
- W.** 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*)
- X.** Consideration, Discussion, and Vote to Adjourn

Posted: _____ Date: _____ Time: _____

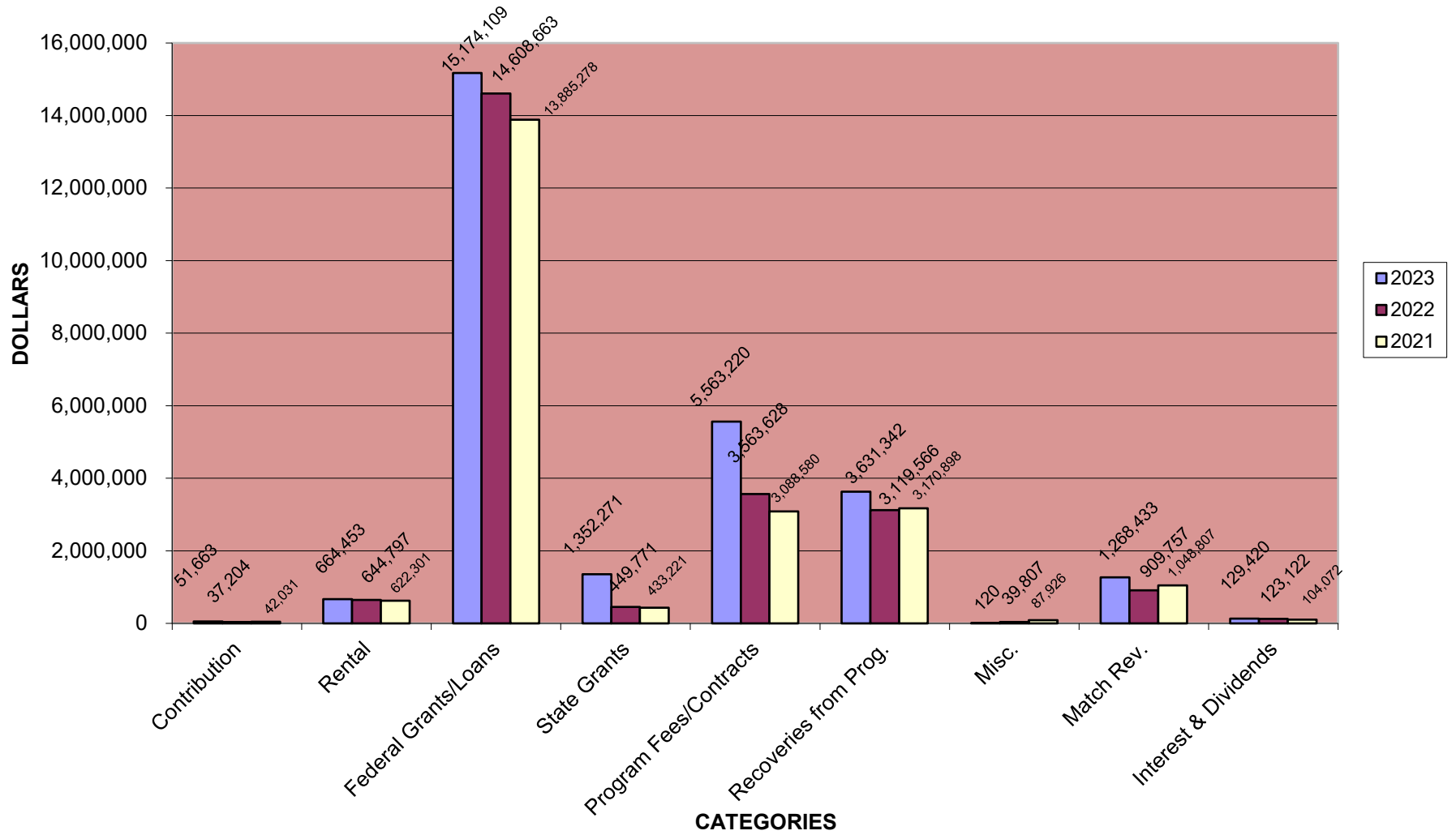
**LIFT COMMUNITY ACTION AGENCY, INC.
REVENUES**



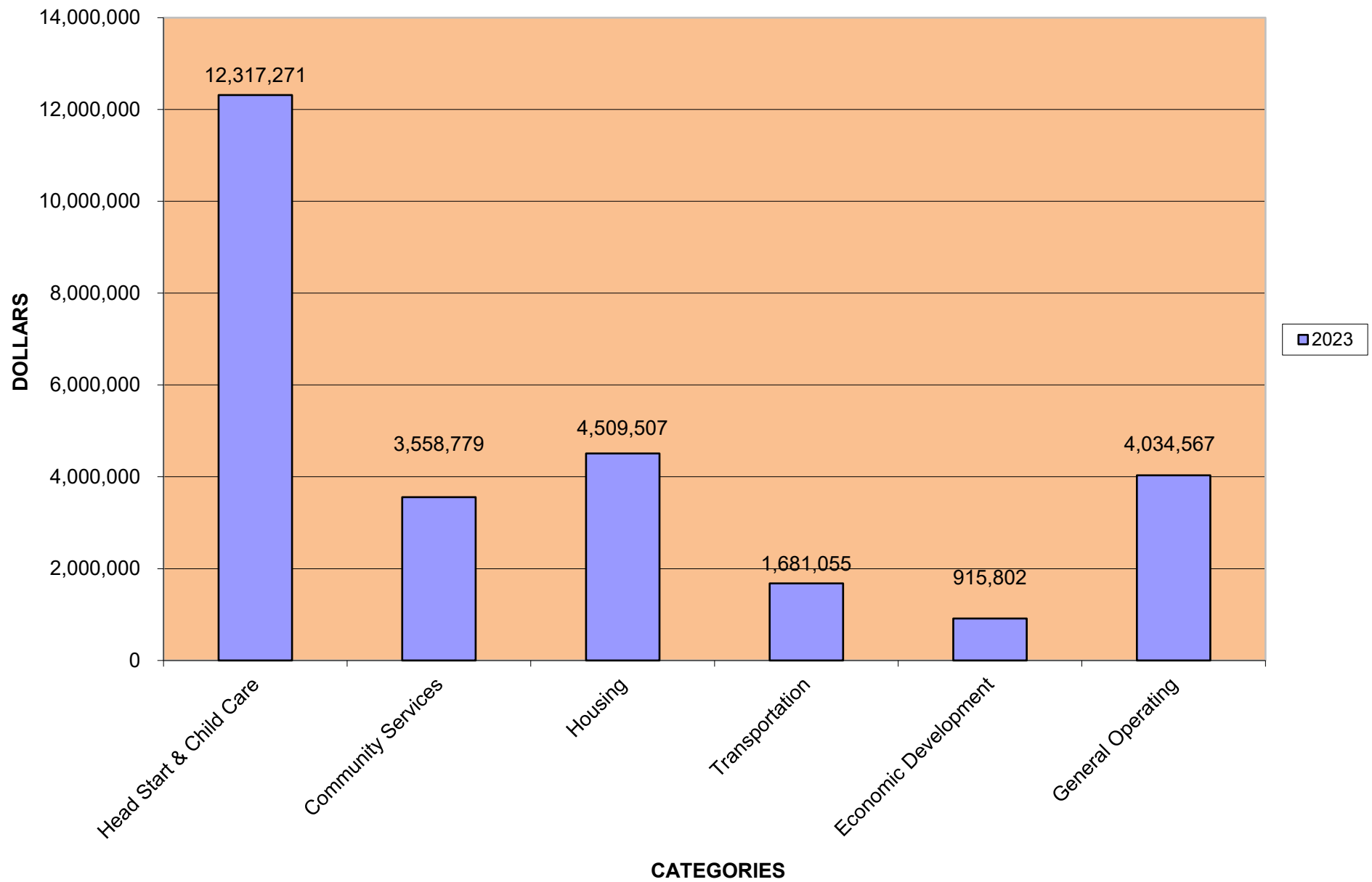
**LIFT COMMUNITY ACTION AGENCY, INC.
REVENUES**



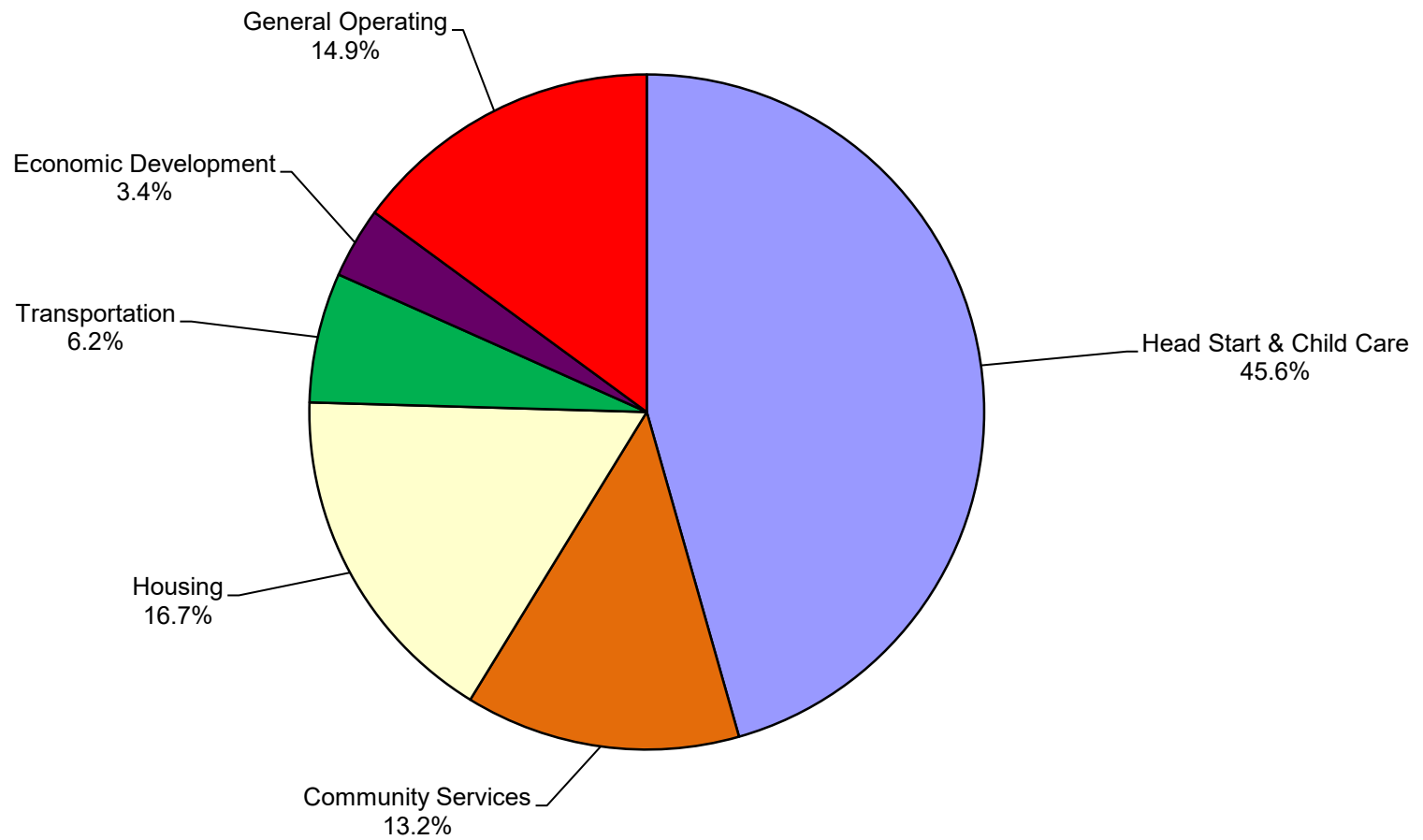
LIFT COMMUNITY ACTION AGENCY, INC. REVENUES



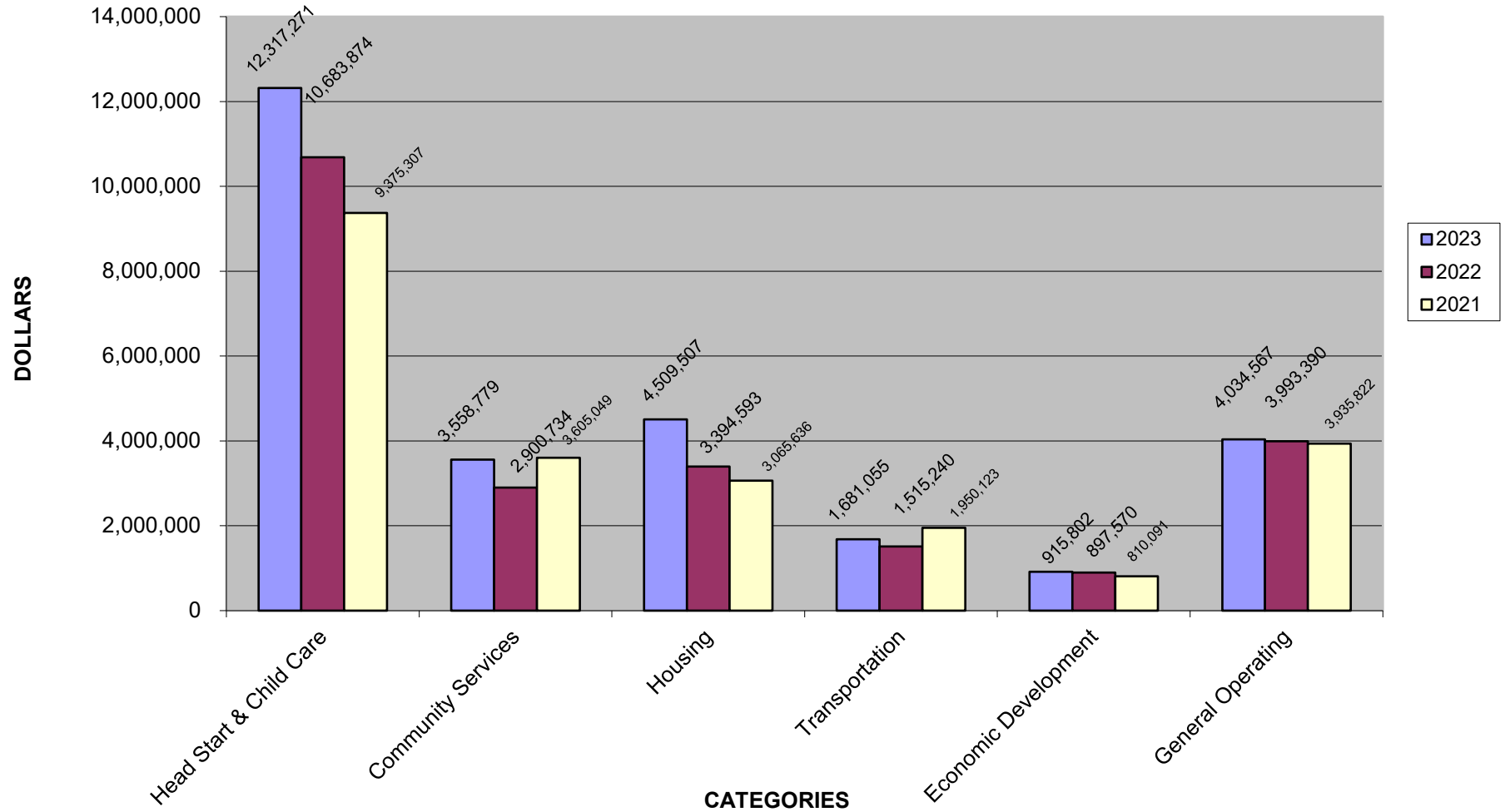
**LIFT COMMUNITY ACTION AGENCY, INC.
EXPENSES BY PROGRAM**



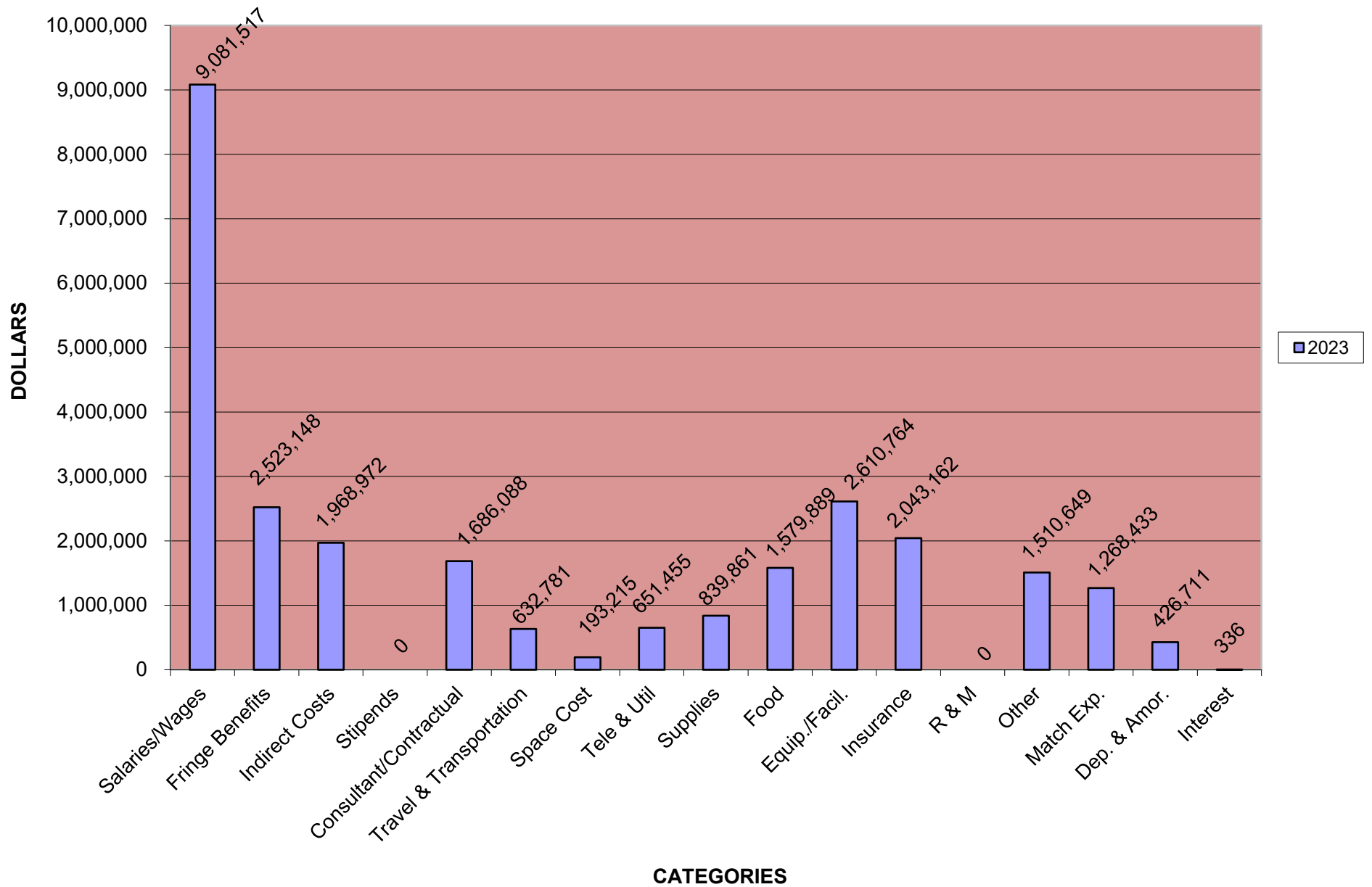
**LIFT COMMUNITY ACTION AGENCY,
EXPENSES BY PROGRAM**



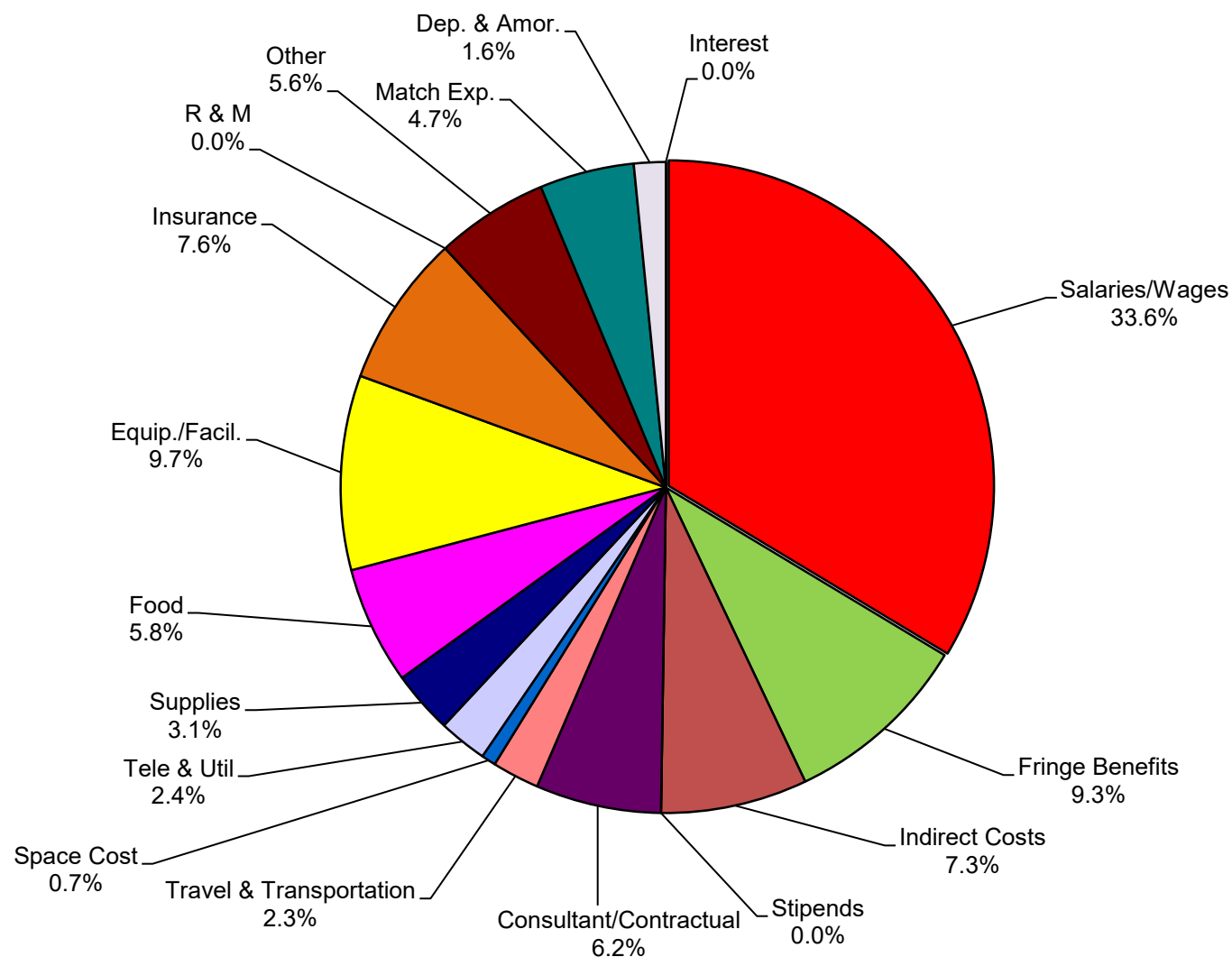
LIFT COMMUNITY ACTION AGENCY, INC. EXPENSES BY PROGRAM



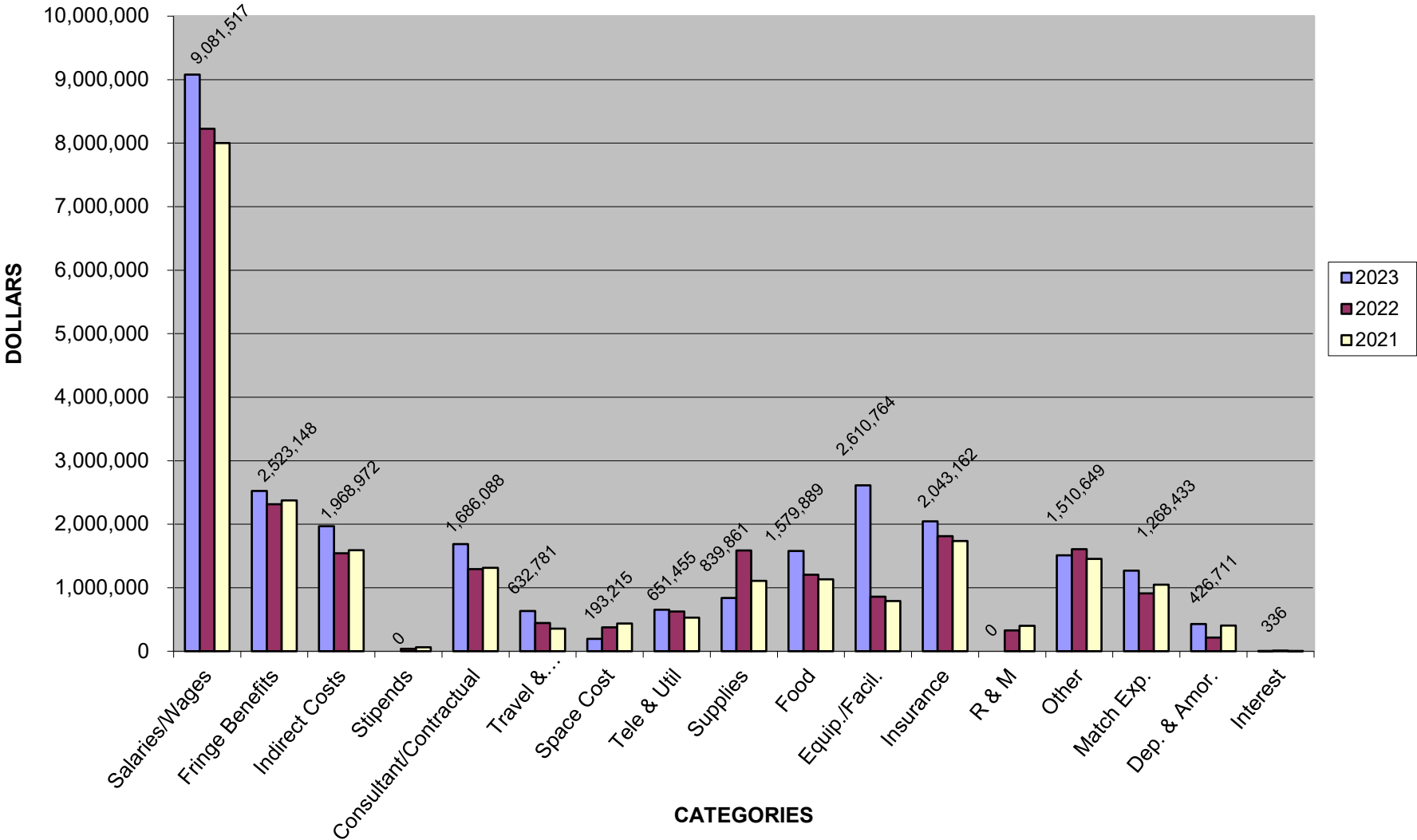
LIFT COMMUNITY ACTION AGENCY, INC. EXPENSES BY NATURAL CLASSIFICATION



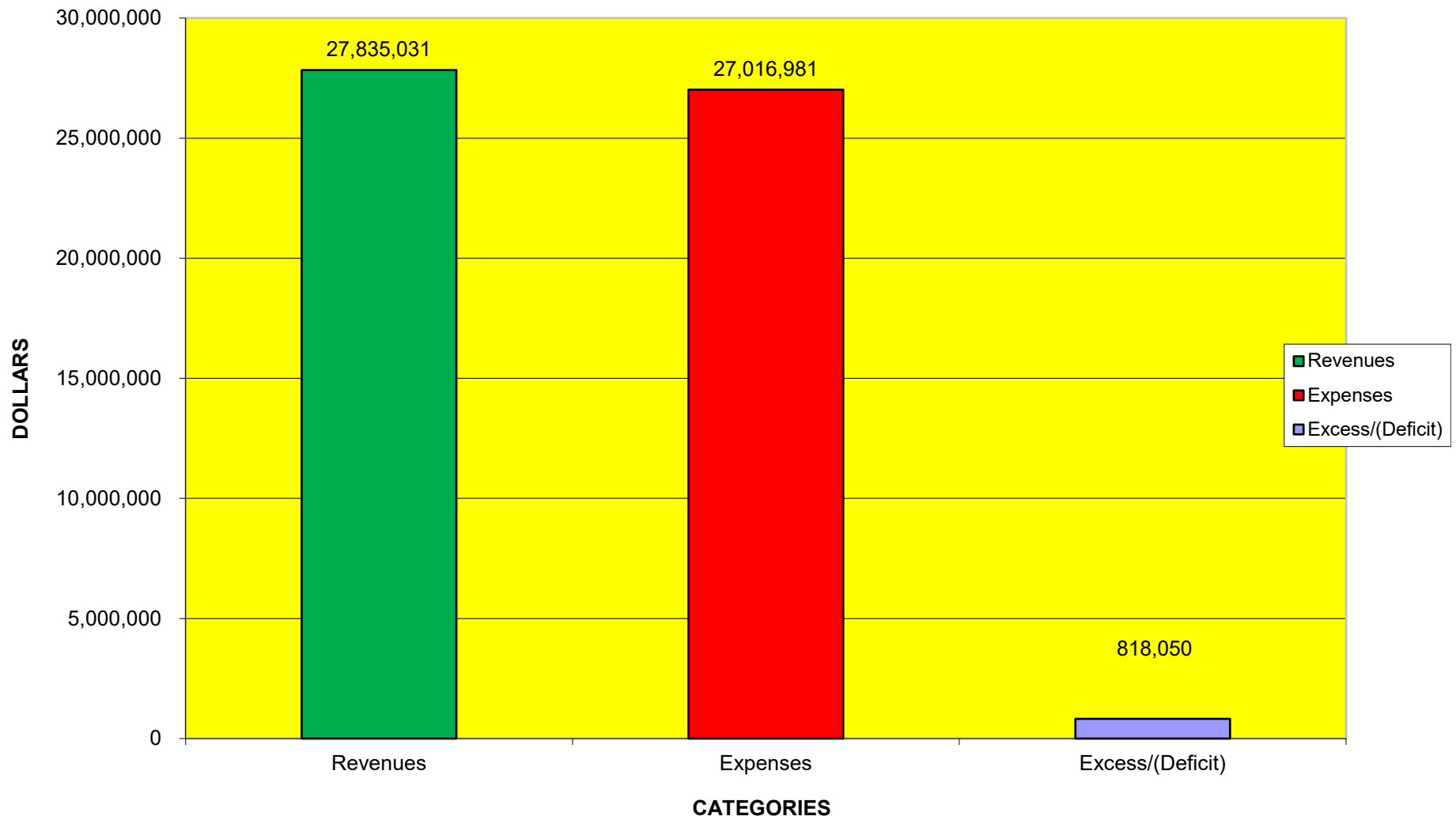
**LIFT COMMUNITY ACTION AGENCY, INC.
EXPENSES BY NATURAL CLASSIFICATION**



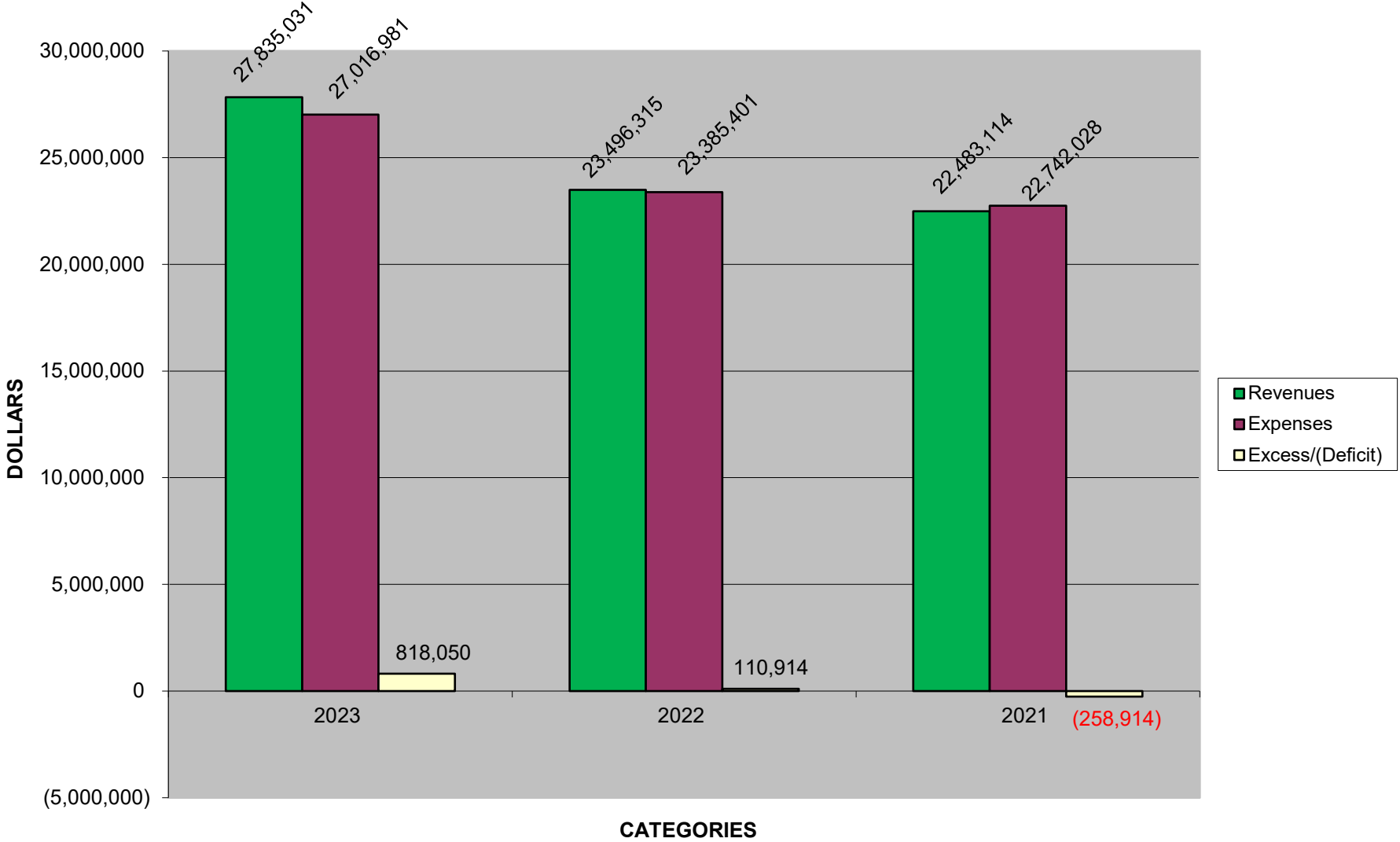
LIFT COMMUNITY ACTION AGENCY, INC. EXPENSES BY NATURAL CLASSIFICATION



**LIFT COMMUNITY ACTION AGENCY, INC.
EXCESS/(DEFICIT) REVENUES**



**LIFT COMMUNITY ACTION AGENCY, INC.
EXCESS/(DEFICIT) REVENUES**



LIFT Community Action Agency, Inc.

Graphical Analysis of Revenues and Expenditures

Revenues

	2023	2022	2021
Contribution	51,663	37,204	42,031
Rental	664,453	644,797	622,301
Federal Grants/Loans	15,174,109	14,608,663	13,885,278
State Grants	1,352,271	449,771	433,221
Program Fees/Contracts	5,563,220	3,563,628	3,088,580
Recoveries from Prog.	3,631,342	3,119,566	3,170,898
Misc.	120	39,807	87,926
Match Rev.	1,268,433	909,757	1,048,807
Interest & Dividends	129,420	123,122	104,072
Total Revenue	27,835,031	23,496,315	22,483,114

Expenses by Program

	2023	2022	2021
Head Start & Child Care	12,317,271	10,683,874	9,375,307
Community Services	3,558,779	2,900,734	3,605,049
Housing	4,509,507	3,394,593	3,065,636
Transportation	1,681,055	1,515,240	1,950,123
Economic Development	915,802	897,570	810,091
General Operating	4,034,567	3,993,390	3,935,822
Total Program Expenses	27,016,981	23,385,401	22,742,028

Expenses by Natural Classification

	2023	2022	2021
Salaries/Wages	9,081,517	8,227,211	8,001,448
Fringe Benefits	2,523,148	2,315,524	2,375,399
Indirect Costs	1,968,972	1,541,816	1,592,254
Stipends	0	38,649	63,771
Consultant/Contractual	1,686,088	1,291,569	1,311,796
Travel & Transportation	632,781	442,611	355,361
Space Cost	193,215	374,974	437,422
Tele & Util	651,455	624,409	529,155
Supplies	839,861	1,585,140	1,108,038
Food	1,579,889	1,203,654	1,131,981
Equip./Facil.	2,610,764	859,987	790,778
Insurance	2,043,162	1,811,270	1,735,630
R & M	0	326,065	400,537
Other	1,510,649	1,607,830	1,455,009
Match Exp.	1,268,433	909,757	1,048,807
Dep. & Amor.	426,711	215,370	404,195
Interest	336	9,565	447
Total Expenses	27,016,981	23,385,401	22,742,028

	2023	2022	2021
Revenues	27,835,031	23,496,315	22,483,114
Expenses	27,016,981	23,385,401	22,742,028
Excess/(Deficit)	818,050	110,914	(258,914)

LIFTCAA

Other Expenses

	<u>2023</u>	<u>2022</u>	<u>2021</u>
Rehab/Renovation	0	0	0
Postage	12,324	10,520	23,664
Advertising/Promotion	122,968	105,247	79,377
Printing & Publication	71,861	52,632	65,808
Other	685,903	1,146,127	948,409
Training	242,667	73,762	77,096
Fees, License, Dues	237,150	141,830	182,959
Direct Services	137,776	79,754	79,889
Bad Debt Expense	0	(2,042)	(2,193)
	<u>0</u>	<u>0</u>	<u>0</u>
	<u>1,510,649</u>	<u>1,607,830</u>	<u>1,455,009</u>

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

MINUTES
BOARD OF DIRECTORS MEETING
May 14, 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, May 14, 2024 at 10:04 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 Brent Franks.

Roll Call was taken and a quorum was established (18 Board Members present, 8 absent). The following Board Members were present at the meeting site: Tami Barnes, Colby Bryant, Brad Burgett, Kevin Cory, Brent Franks, David Hawkins, Andrea Henkel, Jordan Hill, Jia Johnson, Sharon Johnson, Jeffery Lucas, Kara Maness, Sandra Meeks, Carolyn Pool, David Smith, Consuelo Splawn, Jim Bob Sullivan, and Leah Thomas. The following members were absent: Tiffany Brockway, Kristi Graham, Patsy Guess, Vickie Leathers, William Smith, Vicky Wade, Debra Williams, and Craig Young. LIFT CAA employees and visitors present at the meeting site were: Rhonda Teague, Johnny Moffitt, Stella Dennis, Darla Galyon, Dawn McDaniel, Jordan Mack, Kathy James, Sheree Ensley, Macy Self, Amber Duncan, Kim Brumber, Shelley Dennis, Alex Wallis, and Rebecca (Reynolds) Porter. LIFT CAA employees and/or visitors present, appearing remotely via the Zoom communications platform included: Kevin Battle, Rosalind Cochran, and Eric Haralson.

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

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Colby Bryant as appointed representative for the Hugo Rotary Club, a Private Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2024). A motion was made by Leah Thomas and seconded by Jeffery Lucas to accept Colby Bryant as appointed representative for the Hugo Rotary Club, a Private Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item C).

Board Member Kevin Cory was appointed to serve as Board Mentor for new Board Member Colby Bryant (Organizational Standard 5.7).

Sheree Ensley, Fiscal Officer, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on May 14, 2024 at 9:02 a.m. The Committee received a status report on all active loans; there were no new loan applications to present. The Committee voted to recommend full Board approval of the agency's Financial Reports for February and March 2024. The Committee was presented with the April 2024 Financial Reports. The Committee also received updates on the 403(b) Retirement Plan Audit and 2023 Agency Audit. The 403(b) Retirement Plan Audit is complete, with the Form 5500 filed by the extended deadline. The draft form of the 2023 Agency Audit is being reviewed; there was a finding on internal controls but no material weaknesses of the financial statements. The 2023 Agency Audit will be presented to the Board at the June 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 March 2024 Regular Meeting Minutes and the February 2024 and March 2024 Financial Reports; the April 2024 Financials were distributed for consideration and vote at the June 2024 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Tami Barnes and seconded by David Smith to approve the March 2024 Regular Meeting Minutes and the February 2024 and March 2024 Financial Reports. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Items F & G).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

1. Fathers Forward Initiative Bid (Choctaw County) to Oklahoma Department of Human Services in the amount of \$900,000; if awarded, the Choctaw County Strong Fathers Program will work to promote responsible fatherhood through activities and supports aimed at improving outcomes for fathers and families in Choctaw County, Oklahoma. Funds will be used to support three staff positions to conduct the program during the three-year project period, with a combined reach of 225 fathers/father figures served.
2. Fathers Forward Initiative Bid (McCurtain County) to Oklahoma DHS in the amount of \$900,000; if awarded, the McCurtain County Strong Fathers Program will work to promote responsible fatherhood through activities and supports aimed at improving outcomes for fathers and families in McCurtain County, Oklahoma. Funds will be used to support three staff positions to conduct the program during the three-year project period, with a combined reach of 225 fathers/father figures served.
3. Fathers Forward Initiative Bid (Pushmataha County) to Oklahoma DHS in the amount of \$900,000; if awarded, the Pushmataha County Strong Fathers Program will work to promote responsible fatherhood through activities and supports aimed at improving outcomes for fathers and families in Pushmataha County, Oklahoma. Funds will be used to support three staff positions to conduct the program during the three-year project period, with a combined reach of 225 fathers/father figures served.
4. Know and Grow Oklahoma: Building Resilient Children, Families & Communities – Family Resource Center Grant Application to Potts Family Foundation in the amount of \$263,497; if awarded, LIFT CAA's Family Resource Center will serve as a centralized hub for families to access information/referrals, services, resources, and supports. The FRC will promote cross-sector collaboration, serving to strengthen systems across rural southeastern

Oklahoma to mitigate the impact of adversity and support protective factors among families with children under age five. The FRC will serve Choctaw, McCurtain, and Pushmataha Counties. Staff will provide direct assistance, conduct consultations/screenings, and facilitate or conduct education/training/skill-building sessions with parents and families (individually or group-based, in collaboration with partners as available). Crucial to the success of the FRC will be the establishment and ongoing engagement of a Parent Advisory Committee to inform and meaningfully support the center's efforts.

5. FY 2024 Community Services Block Grant Application (3rd Allocation) to Oklahoma Department of Commerce/Community Development in the amount of \$37,275; if awarded, this funding will be used for operational support of agency programs.
6. Week of the Young Child Grant Applications (Early Learning Centers) to Choctaw Nation of Oklahoma, Child Care Assistance Program in the amount of \$2,000; if awarded, these funds (\$500 per center) will be used to purchase playground and classroom equipment and/or supplies to benefit the children enrolled in the Early Learning Centers in Antlers, Broken Bow, Hugo, and Idabel.
7. 2024 Grant Application (Innovation and Pilot Project Funding) to Potts Family Foundation in the amount of \$34,247; if awarded, the funding would be used to establish the Family Support and Resiliency Initiative. Project funding would allow for the creation of a new Family Advocate staff position, whose purpose will be to provide evidence-based family support services to children (prenatal to age 5) and their families. The project will also work to develop child, family and community resilience, supporting early relational health and preventing and mitigating adverse childhood experiences through the provision of education/training and family-positive activities/events.
8. FY 2024 Rural Domestic Violence, Dating Violence, Sexual Assault, and Stalking Program Grant Application to Office on Violence Against Women in the amount of \$815,000; if awarded, these funds will be used to continue operations of the Safe Place Healing Hearts Program, which employs three program staff. These funds will be used over a period of 36 months to enhance services for and ensure the safety of victims of domestic violence, dating violence, sexual assault, and stalking within Choctaw, McCurtain, and Pushmataha Counties. Funding will be used to directly serve victims of such crimes; build the capacity of direct service providers to better serve and protect victims; encourage reporting of these crimes; and ensure all service providers are adequately trained on how to appropriately respond, assist victims, improve the rate of prosecution of such crimes, working together through coordinated service delivery.
9. FY 2024 Second Chance Act Community-Based Reentry Program Grant Application to Bureau of Justice Assistance in the amount of \$750,000; if awarded, these funds would be used to support programming to provide pre-release services to offenders in the tri-county area. These services would continue post-release and also include case management, education and services linkage in order to facilitate a smooth, successful community reentry process for participants. In total, 240 offenders will be served (pre- and post-release) over the three-year program period.
10. Signature Cause Grant Application (Retired and Senior Volunteer Program) to International Paper Foundation in the amount of \$15,000; if awarded, these funds will be used for RSVP programmatic support as well as to provide operating support for the program's four food bank stations.

After discussion and Board Member input with regards to the applications presented, a motion was made by Jim Bob Sullivan and seconded by Andrea Henkel to approve the submission of resolutions and/or grant applications in the amount of \$4,617,019 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

1. RSVP Donation from Pushmataha County Historical Society in the amount of \$500; these funds will be used for operational expenses of the agency's AmeriCorps Seniors Retired and Senior Volunteer Program.
2. Court Appointed Special Advocates Donation from Pushmataha County Historical Society in the amount of \$500; these funds will be used for operational expenses of the agency's CASA Program.
3. Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Award (Extension) from Health Resources and Services Administration in the amount of \$95,343; these extension funds will be utilized to support continued Healthy Start services within the project area for a one-month period, ending April 30, 2024. Extension funding was granted to all existing Healthy Start grantees that applied for a competing continuation to mitigate any potential delays in FY 2024 appropriations from Congress.
4. Child Care Stabilization Grant Program Awards (Year 3/Quarter 3, Early Learning Centers) from Choctaw Nation of Oklahoma in the amount of \$32,000; funding will provide key operating support to maintain child care services within the Early Learning Centers.
5. FY 2024 CSBG Award (3rd Allocation) from ODOC in the amount of \$37,275; these funds represent the core funding source to support Community Action Agencies and other CSBG-funded organizations whose primary mission is to address and alleviate poverty within their communities. This third allocation of funds will be used for operational support of agency programs. The total amount awarded for FY 2024 is \$119,254.
6. 2024 Community Grants Program Award from Carolyn Watson Rural Oklahoma Community Foundation in the amount of \$5,000; funding will be used by the AmeriCorps Seniors Retired and Senior Volunteer Program to implement strategies and activities within program stations to positively influence healthy behaviors and empower rural citizens to improve and better manage their health. This will be accomplished through preventive health education programming and screenings as well as wellness activities that promote the integration of healthy lifestyle choices, physical activity and good nutrition into daily routines.
7. HOME Investment Partnerships Program Grant Award (Rental New Construction) from Oklahoma Housing Finance Agency in the amount of \$750,000; these funds will be used to construct two duplex apartment buildings in Valliant, Oklahoma.
8. FY 2024 Head Start/Early Head Start Program Grant Award (New/Baseline, Balance of Funds) from Administration for Children and Families in the amount of \$2,254,969; this balance of funding for the total award will provide support for program operations and training/technical assistance for the Head Start and Early Head Start Programs for a period of one year (December 1, 2023 – November 30, 2024), with a funded Federal enrollment of 435 children (387 Head Start, 48 EHS). The total amount awarded for FY 2024 is \$4,509,940.

9. FY 2024 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Award (Year 11) from HRSA in the amount of \$1,008,333; these funds will be utilized during the first year of a new five-year grant cycle to improve access to quality health care and services for women, infants, children, and families through outreach, care coordination, health education and linkage to health insurance; building healthy communities and ensuring ongoing, coordinated, comprehensive services are provided in the most efficient manner through effective service delivery; strengthening the health workforce, specifically those individuals responsible for providing direct services; and promoting and improving health equity by connecting with appropriate organizations.
10. Technical and Management Assistance Contract Award – Region 2 (Option Year 1) from U.S. Department of Agriculture, Rural Development in the amount of \$1,531,020.07; these funds will be used to provide technical and management assistance services to Self-Help Housing Grantees within Region 2 (South Central), comprised of the following 11 states: Arkansas, Kansas, Louisiana, Missouri, Nebraska, New Mexico, North Dakota, Oklahoma, South Dakota, Texas, and Wyoming. With this funding, LIFT CAA will furnish all labor, management, supervision, quality control, facilities, equipment, materials, and services needed to perform the requirements of the contract during Option Year 1 (April 1, 2024 – March 31, 2025).
11. NeighborWorks Week Grant Award from NeighborWorks® America in the amount of \$1,000; 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).

A motion was made by Tami Barnes and seconded by Brad Burgett to approve acceptance of grants, contracts, and awards in the amount of \$5,715,940.07 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I).

Darla Galyon, Head Start/Early Head Start/EHS-Child Care Director, requested the Board's consideration, discussion, and vote to approve the submission of an FY 2023 Disability Waiver Request for the Early Head Start-Child Care Partnership Program to the Office of Head Start. The agency is 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. Program enrollment has suffered tremendously, which has in turn affected how many children in the community are able to go through the program's screening processes. Therefore, it is necessary to submit the Waiver in order to ensure compliance if the goal is not reached by the end of the program year. A motion was made by Brad Burgett and seconded by Jim Bob Sullivan to approve the submission of an FY 2023 Disability Waiver Request for the Early Head Start-Child Care Partnership Program to the Office of Head Start. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item J).

Kathy James, Senior Program Planner, requested the Board's consideration, discussion, and vote to approve submission of a Change in Scope – Enrollment Reduction Amendment Application for the EHS-Child Care Program to the Office of Head Start. James explained that LIFT CAA is requesting the Funded Federal Enrollment to change from 120 EHS-Child Care Partnership slots to 112 slots without reducing the amount of grant funding received (\$2,053,548

in total). The program has faced enrollment issues for over five years, which stems from competition with other early childhood programming in the area as well as the requirement for child care subsidy to be eligible. LIFT's EHS-Child Care Program is currently underenrolled and on an Underenrollment Plan as part of the Full Enrollment Initiative. The Underenrollment Plan began on June 10, 2023 and comprises a period of 12 months. An enrollment reduction was identified as a step within the corrective action plan as it will be impossible to obtain full enrollment due to the factors described. The proposed changes are sustainable: the program is requesting a reduction from 120 EHS-Child Care slots to 112 slots (a change of 8 slots, or 6.7%); as enrollment is at 113 (as of April 2024) and the program has been able to average near this number (107) for the last nine months, it feels like an obtainable goal. With this enrollment reduction, the program is expected to be able to meet the goal of 112 slots in the future and remain fully enrolled and in compliance with the Full Enrollment Initiative. The majority of the budgetary changes will be within the Personnel category due to reallocation of the Management Team's time distribution, as well as an increase in funding for partner center reimbursement (due to rising operations costs). The Board of Directors discussed the request and provided input regarding the application. A motion was made by Kevin Cory and seconded by Sharon Johnson to approve the Change in Scope – Enrollment Reduction Amendment Application for the EHS-Child Care Program 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 K).

Sheree Ensley, Fiscal Officer, requested the Board's consideration, discussion, and vote to approve submission of the LIFT CAA 403(b) Retirement Plan Form 5500 for Plan Year 2022 (period of August 1, 2022–July 31, 2023). Ensley presented the Retirement Plan Audit/Form 5500 filing and explained that there were no issues or findings. These documents were emailed to the entire Board to allow for adequate review prior to the May 2024 Board Meeting. A motion was made by Kara Maness and seconded by Andrea Henkel to approve submission of the LIFT CAA 403(b) Retirement Plan Form 5500 for Plan Year 2022, period of August 1, 2022–July 31, 2023. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item L).

Macy Self, Associate Director, requested the Board's 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 (CHDO) in all decisions regarding the design, siting, development, and management of HOME-assisted affordable housing projects. Since 1992, LIFT CAA has been certified as a CHDO. As a CHDO, the agency is required to seek advisory input from low-income beneficiaries prior to any housing activity supported by HOME funds. This Resolution is reviewed and re-adopted annually by the Board to ensure policies and the Resolution align with the U.S. Department of Housing and Urban Development's guidelines. As described in Attachment A of the Resolution, public input sessions will be held in-person and/or virtually. The meeting dates have not yet been scheduled, but the Board will be updated on activities once the dates are set. A motion was made by Jim Bob Sullivan and seconded by Brad Burgett 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. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item M).

Darla Galyon, Head Start/Early Head Start/EHS-Child Care Director, requested the Board's consideration, discussion, and vote to approve or disapprove the 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. The Federal Communication Commission's E-Rate program makes telecommunications and information services more affordable for schools and libraries. With funding from the Universal Service Fund, E-Rate provides discounts (from 20-90% based on poverty level and rurality) for telecommunications, Internet access, and internal connections to eligible schools and libraries. A motion was made by Jordan Hill and seconded by Carolyn Pool to approve the 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). The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item N).

Jordan Mack, Head Start/Early Head Start/EHS-Child Care Assistant Director, requested the Board's consideration, discussion, and vote to approve the EHS-Child Care Program 2024-2025 Training and Technical Assistance Plan. The provision of technical assistance and training serves to improve program quality. Program staff receive a combination of Pre-service and In-service training as well as various other training opportunities. Trainings provided are based on staff needs, self-assessment, new best practices, training needs assessment, individual professional development plans, and Head Start Performance Standards. In addition to program staff, the Training and Technical Assistance Plan also includes development opportunities for the Policy Council and Board of Directors. The proposed plan covers the period of August 1, 2024 through July 31, 2025 and outlines how the \$42,863 allocated for training and technical assistance will be expended during the program year. The plan is flexible and can be changed if or when needed. A motion was made by Kevin Cory and seconded by Andrea Henkel to approve the EHS-Child Care Program 2024-2025 Training and Technical Assistance Plan. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item O).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration, discussion, and vote to approve signing of a Proclamation recognizing May 2024 as Community Action Month. National Community Action Month was created by the Community Action Partnership to reinforce Community Action Agencies' role in helping low-income families achieve economic stability. Porter explained that each year during the month of May, Community Action Agencies across the Nation engage in events, marketing, and other activities to raise awareness about the services and impact of community action. The proclamation signing by the Board Chairman is one such event. A motion was made by Brent Franks and seconded by Brad Burgett to approve signing of a Proclamation recognizing May 2024 as Community Action Month. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item P).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration, discussion, and vote to approve the signing of a Proclamation recognizing June 1-8, 2024 as NeighborWorks Week. Held during the first full week in June since 1983, NeighborWorks Week is an annual week of service showcasing how the NeighborWorks network strengthens

communities and celebrates the collective impact achieved. A motion was made by Kara Maness and seconded by Jia Johnson to approve the signing of a Proclamation recognizing June 1-8, 2024 as NeighborWorks Week. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item Q).

Jordan Mack, Head Start/Early Head Start/EHS-Child Care Assistant Director, requested the Board's consideration, discussion, and vote to approve the Head Start/Early Head Start/EHS-Child Care 2023-2028 Strategic Plan. The new Strategic Plan was developed to help guide the three programs during the new five-year grant cycle. Mack described the Goals set for the programs and reasoning behind each, along with the associated Objectives and anticipated Outcomes. The Strategic Plan has an outcomes-based focus to facilitate continuous improvement and monitoring of progress within the programs. A motion was made by Jordan Hill and seconded by Tami Barnes to approve the Head Start/Early Head Start/EHS-Child Care Programs' 2023-2028 Strategic Plan. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item R).

Kevin Battle, Senior Director – Organizational Assessment Division, Eric Haralson, Consultant, and Rosalind Cochran, Relationship Manager – Midwest Region, all with NeighborWorks® America, provided a PROMPT Review Debrief Presentation. LIFT CAA underwent a NeighborWorks® America program review the week of May 6, 2024. The program review serves to measure the capacity, performance, and impact of Network members, evaluating an organization's capacity to achieve its mission and goals while reviewing compliance with NeighborWorks® America membership expectations. The uniform program review system is based on evaluating organizational performance and capacity in six key areas, identified by the acronym "PROMPT". The six key areas in PROMPT stands for: Production/Program Services, Resource and Financial Management, Organizational Management and Board Governance, Management, Planning, and Technical Operating and Compliance Systems. Battle, Haralson, and Cochran each explained their respective portions of the program review process, objectives, results, and follow-up expectations, facilitating discussion with the Board and staff as well. LIFT CAA is currently rated (via the Organizational Health Tracking System) as Exemplary, and this collaborative assessment process is designed to promote a self-assessment approach and help enable the agency to become stronger and more effective. The NeighborWorks® America OHTS Committee will review the Organizational Assessment Report to make the final determination of LIFT CAA's rating in the future.

Jordan Mack, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided the Board with an overview of the 2023-2024 Self-Assessment Process for the Head Start, Early Head Start, and EHS-Child Care Programs (Organizational Standards 5.7 and 5.9).

Kathy James, Senior Program Planner, provided the Board with updates concerning the Head Start, Early Head Start, and EHS-Child Care Programs' Cost-of-Living Adjustments and Head Start Change in Scope Request. This year, the Office of Head Start is providing cost-of-living adjustment funding a different way. For those grantees that have already submitted their FY 2024 refunding application, a COLA request submission was not required. This was the case for LIFT CAA's Head Start and Early Head Start Programs, but a COLA request was required to be included in the Early Head Start-Child Care Program application that was due May 1, 2024. The

funding will provide staff of the three programs with a 2.35% COLA to increase salaries and fringe benefits in an effort to ensure retention of experienced, qualified staff and maintain overall program quality. The 2.35% COLA will reflect an increase in the hourly rate of pay for each employee and a permanent increase of 2.35% in the Head Start/EHS/EHS-Child Care pay scale. The COLA increases available for the programs for FY 2024 are as follows: Head Start - \$81,564, EHS - \$23,027, and EHS-Child Care - \$51,086. With regards to the requested Head Start Change in Scope (submitted initially with the New/Baseline refunding application), the initial request was for a reduction from 387 enrollment slots to 260. After submission, the Office of Head Start asked for the Change in Scope Request to be separated from the New/Baseline refunding application, as well as for the program to amend the request to stay below a 24% reduction. The current enrollment level for the Head Start Program is 295 (of 387) and the Early Head Start Program is 48 (fully enrolled). LIFT's Head Start Program is currently underenrolled and on an underenrollment plan as part of the Full Enrollment Initiative. The Underenrollment Plan began on June 10, 2023 and will comprise a period of 12 months. An enrollment reduction was identified as a step within the corrective action plan as it has been impossible to obtain full enrollment due to a range of factors. The proposed changes are sustainable: the program is requesting a reduction from 387 Head Start slots to 295 slots (a change of 92, or 23.8%); with current enrollment at this level, and the program able to average near this number for the last two years, it seems an obtainable goal. No conversion or change to Early Head Start slots are being proposed as the program has had no enrollment issues. With this enrollment reduction, the program is expected to be able to meet the goal of 295 slots in the future, remaining fully enrolled and in compliance with the Full Enrollment Initiative. The proposed amount of slots and funding will allow for more one-on-one time with the children and individualized teaching while also supporting staff pay increases consistent with the Wage Comparability Study to aid in retention/workforce stability.

Rebecca (Reynolds) Porter, Executive Director, provided a Board Training over the following: LIFT CAA History, Mission, Vision, and Values; History and Future of Community Action/Anti-Poverty Work; Statutory and Regulatory Requirements; and CAA Contractor Implementation Manual – Requirement 113 and Updates. Porter then presented a video training to the Board titled “ROMA for Boards: An Introduction” by the Community Action Association of Pennsylvania, which explained the ROMA framework/process (Organizational Standard 5.7).

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. To date, two Board Members have provided a monetary donation to the agency for 2024. 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.

Jordan Mack, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided a Board Training/Programmatic Report over the Fall/Winter 2023-2024 Child Outcomes/Assessment results for the Head Start, Early Head Start, and EHS-Child Care Programs (Organizational Standards 5.7 and 5.9). Growth was shown across all domains for the 3- and 4-

year old children served. EHS and EHS-Child Care Program children are divided into three age groups which represent 2-3 years of age, 1-2 years of age, and birth to 1 year of age. No comparison data is collected on these children due to their age. The Board was provided a copy of the outcomes report in the meeting packet.

Brandon McDaniel, Housing Director, provided a Board Training/Programmatic Report over Quarterly (January–March 2024) Housing Production, as reported to NeighborWorks® America (Organizational Standards 5.7 and 5.9). McDaniel provided a review of the submitted report and facilitated discussion regarding Housing production and activities over the last quarter.

Darla Galyon, Head Start/Early Head Start/EHS-Child Care Director, provided the Board with the Policy Council Report for the March 19, 2024 and April 16, 2024 meetings (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized Johnny Driggers (Energy Auditor, Weatherization Program) as the April 2024 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized Alex Wallis (Administrative Support, Work Ready Idabel) as the May 2024 Employee of the Month.

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); ODOC Comprehensive Monitoring Notice; Opioid Affected Youth Initiative Site Visit Report; and LIFT Community Corral Event (Organizational Standard 5.9).

There being no other business to come before the Board, a motion was made by Brent Franks and seconded by Sandra Meeks to adjourn the regular meeting. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. Voting record is attached (Item EE).

The Regular Meeting adjourned at 12:02 p.m.

Brad Burgett, Secretary/Treasurer

L. THOMAS

D. LUCAS

T. BARNES

D. SMITH

J. SULLIVAN

A. HENKEL

T. BARNES

B. BURGETT

B. BURGETT

J. B. SULLIVAN

CALL
To
ORDER:
10:04
am

May 14, 2024		Present	Absent	C			F&G			H			I			J		
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓			✓			✓			✓		
2	Tiffany Brockway		✓															
3	Colby Bryant	✓					✓			✓			✓			✓		
4	Brad Burgett	✓		✓			✓			✓			✓			✓		
5	Kevin Cory	✓		✓			✓			✓			✓			✓		
6	Brent Franks	✓		✓			✓			✓			✓			✓		
7	Kristi Graham		✓															
8	Patsy Guess		✓															
9	Andrea Henkel	✓		✓			✓			✓			✓			✓		
10	Jordan Hill	✓					✓			✓			✓			✓		
11	Jia Johnson	✓		✓			✓			✓			✓			✓		
12	Sharon Johnson	✓		✓			✓			✓			✓			✓		
13	Vickie Leathers		✓															
14	Jeffery Lucas	✓		✓			✓			✓			✓			✓		
15	Kara Maness	✓		✓			✓			✓			✓			✓		
16	Sandra Meeks	✓		✓			✓			✓			✓			✓		
17	Carolyn Pool	✓		✓			✓			✓			✓			✓		
18	David Smith	✓		✓			✓			✓			✓			✓		
19	William Smith		✓															
20	Consuelo Splawn	✓		✓			✓			✓			✓			✓		
21	Jim Bob Sullivan	✓		✓			✓			✓			✓			✓		
22	Leah Thomas	✓		✓			✓			✓			✓			✓		
23	Vicky Wade		✓															
24	Debra Williams		✓															
25	Craig Young		✓															
26	David Hawkins	✓																
27																		

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	May 14, 2024	Present	Absent	K			L			M			N			O		
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓			✓			✓			✓		
2	Tiffany Brockway		✓															
3	Colby Bryant	✓		✓			✓			✓			✓			✓		
4	Brad Burgett	✓		✓			✓			✓			✓			✓		
5	Kevin Cory	✓		✓			✓			✓			✓			✓		
6	Brent Franks	✓		✓			✓			✓			✓			✓		
7	Kristi Graham		✓															
8	Patsy Guess		✓															
9	Andrea Henkel	✓		✓			✓			✓			✓			✓		
10	Jordan Hill	✓		✓			✓			✓			✓			✓		
11	Jia Johnson	✓		✓			✓			✓			✓			✓		
12	Sharon Johnson	✓		✓			✓			✓			✓			✓		
13	Vickie Leathers		✓															
14	Jeffery Lucas	✓		✓			✓			✓			✓			✓		
15	Kara Maness	✓		✓			✓			✓			✓			✓		
16	Sandra Meeks	✓		✓			✓			✓			✓			✓		
17	Carolyn Pool	✓		✓			✓			✓			✓			✓		
18	David Smith	✓		✓			✓			✓			✓			✓		
19	William Smith		✓															
20	Consuelo Splawn	✓		✓			✓			✓			✓			✓		
21	Jim Bob Sullivan	✓		✓			✓			✓			✓			✓		
22	Leah Thomas	✓																
23	Vicky Wade		✓															
24	Debra Williams		✓															
25	Craig Young		✓															
26	David Hawkins	✓																
27																		

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May 14, 2024		Present	Absent	P			Q			R			EE					
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓			✓								
2	Tiffany Brockway		✓															
3	Colby Bryant	✓		✓			✓			✓			✓					
4	Brad Burgett	✓		✓			✓			✓			✓					
5	Kevin Cory	✓		✓			✓			✓								
6	Brent Franks	✓		✓			✓			✓			✓					
7	Kristi Graham		✓															
8	Patsy Guess		✓															
9	Andrea Henkel	✓		✓			✓			✓			✓					
10	Jordan Hill	✓		✓			✓			✓			✓					
11	Jia Johnson	✓		✓			✓			✓			✓					
12	Sharon Johnson	✓		✓			✓			✓			✓					
13	Vickie Leathers		✓															
14	Jeffery Lucas	✓		✓			✓			✓			✓					
15	Kara Maness	✓		✓			✓			✓								
16	Sandra Meeks	✓		✓			✓			✓			✓					
17	Carolyn Pool	✓		✓			✓			✓			✓					
18	David Smith	✓		✓			✓			✓			✓					
19	William Smith		✓															
20	Consuelo Splawn	✓		✓			✓			✓			✓					
21	Jim Bob Sullivan	✓		✓			✓			✓			✓					
22	Leah Thomas	✓																
23	Vicky Wade		✓															
24	Debra Williams		✓															
25	Craig Young		✓															
26	David Hawkins	✓																
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12:02 pm

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

FINANCIAL ROW	AMOUNT (AS OF MAY 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	\$9,510,792.77	\$9,869,315.88	(\$358,523.11)	-3.63%
1020 - Payroll Account	\$382,125.79	\$363,621.18	\$18,504.61	5.09%
1021 - First United Accounts Payable	\$16,558.39	(\$34,467.85)	\$51,026.24	-148.04%
1022 - First United TH Reserve	\$142,527.47	\$139,439.77	\$3,087.70	2.21%
1023 - First United General Escrow	\$86,801.37	\$159,540.20	(\$72,738.83)	-45.59%
1024 - First United Marina License	\$221.97	\$240.82	(\$18.85)	-7.83%
1025 - First United Deposit (PayPal)	\$2,115.20	\$2,115.20	\$0.00	0.00%
1028 - First United Unrestricted Funds CD	\$822,783.89	\$822,783.89	\$0.00	0.00%
1030 - Shamrock Bank - Clayton	\$1,843.37	\$1,835.61	\$7.76	0.42%
1040 - Petty Cash	\$410.00	\$410.00	\$0.00	0.00%
1050 - McCurtain County National Bank	\$7,326.60	\$17,224.53	(\$9,897.93)	-57.46%
1070 - Fund to Fund Allocation Transfers	\$132,141.25	\$0.00	\$132,141.25	0.00%
Total - 1000 - Cash	\$11,105,648.07	\$11,342,059.23	(\$236,411.16)	-2.08%
Total Bank	\$11,105,648.07	\$11,342,059.23	(\$236,411.16)	-2.08%
Accounts Receivable				
1100 - Receivables				
1105 - Accrued Acct Receivable	\$234,532.68	\$234,372.80	\$159.88	0.07%
1110 - Accounts Receivable	\$143,521.72	\$1,593,000.67	(\$1,449,478.95)	-90.99%
1120 - Due From (A/R)	(\$3,003.00)	\$269,370.66	(\$272,373.66)	-101.11%
Total - 1100 - Receivables	\$375,051.40	\$2,096,744.13	(\$1,721,692.73)	-82.11%
1300 - Other receivables				
1320 - Notes/loans receivable	\$334,632.06	\$335,515.82	(\$883.76)	-0.26%
1321 - Loans Receivable from Belmont	\$165,896.48	\$162,809.48	\$3,087.00	1.90%
1322 - Loans Receivable from Clayton	\$204,532.53	\$202,957.53	\$1,575.00	0.78%
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%
1326 - Loans Receivable from Rouleau House	\$51,909.76	\$51,909.76	\$0.00	0.00%
Total - 1300 - Other receivables	\$1,302,536.30	\$1,298,758.06	\$3,778.24	0.29%
Total Accounts Receivable	\$1,677,587.70	\$3,395,502.19	(\$1,717,914.49)	-50.59%
Other Current Asset				
1400 - Other assets				
1450 - Prepaid Expenses	\$0.00	\$26,628.16	(\$26,628.16)	-100.00%
1465 - Advances Paid	\$4,607.77	\$0.00	\$4,607.77	0.00%
Total - 1400 - Other assets	\$4,607.77	\$26,628.16	(\$22,020.39)	-82.70%
1500 - Investments				
1530 - Property/Lots held for Sale	\$375,516.35	\$375,516.35	\$0.00	0.00%
1599 - Undeposited Funds	\$2,049.88	(\$1,048.76)	\$3,098.64	-295.46%
Total - 1500 - Investments	\$377,566.23	\$374,467.59	\$3,098.64	0.83%

6/6/24, 2:29 PM

Comparative Balance Sheet

FINANCIAL ROW	AMOUNT (AS OF MAY 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
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	\$383,633.04	\$401,095.74	(\$17,462.70)	-4.35%
Total Current Assets	\$13,166,868.81	\$15,138,657.16	(\$1,971,788.35)	-13.02%
Fixed Assets				
1600 - Fixed operating assets				
1610 - Land	\$1,087,094.00	\$1,087,094.00	\$0.00	0.00%
1620 - Buildings	\$7,056,276.04	\$7,056,276.04	\$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	\$900,393.01	\$900,393.01	\$0.00	0.00%
1650 - Vehicles	\$3,609,015.32	\$3,609,015.32	\$0.00	0.00%
Total - 1600 - Fixed operating assets	\$14,775,789.16	\$14,775,789.16	\$0.00	0.00%
1700 - Accum deprec - fixed operating assets				
1725 - Accum deprec - building	(\$5,578,660.84)	(\$5,578,660.84)	\$0.00	0.00%
1735 - Accum amort - leasehold improvements	(\$2,072,640.82)	(\$2,072,640.82)	\$0.00	0.00%
1740 - Accum. Amortization Leases	(\$16,116.90)	(\$16,116.90)	\$0.00	0.00%
Total - 1700 - Accum deprec - fixed operating assets	(\$7,667,418.56)	(\$7,667,418.56)	\$0.00	0.00%
Total Fixed Assets	\$7,108,370.60	\$7,108,370.60	\$0.00	0.00%
Other Assets				
1800 - Other Assets				
1810 - Right to Use Asset - Leases	\$16,729.67	\$16,729.67	\$0.00	0.00%
1950 - State Dated Payables	(\$12.99)	\$0.00	(\$12.99)	0.00%
Total - 1800 - Other Assets	\$16,716.68	\$16,729.67	(\$12.99)	-0.08%
Total Other Assets	\$16,716.68	\$16,729.67	(\$12.99)	-0.08%
Total ASSETS	\$20,291,956.09	\$22,263,757.43	(\$1,971,801.34)	-8.86%
Liabilities & Equity				
Current Liabilities				
Accounts Payable				
2000 - Payables	(\$13,169.63)	(\$19,531.88)	\$6,362.25	-32.57%
Total Accounts Payable	(\$13,169.63)	(\$19,531.88)	\$6,362.25	-32.57%
Other Current Liability				
2100 - Accrued liabilities				
2105 - Accrued Expense Payables	\$253,000.55	\$583,749.11	(\$330,748.56)	-56.66%
2110 - Wages Payable	\$352,669.53	\$352,669.53	\$0.00	0.00%
2120 - Accrued Employee Benefits	\$292,566.11	\$312,530.75	(\$19,964.64)	-6.39%
2130 - Accrued payroll taxes	\$28,989.34	\$30,053.14	(\$1,063.80)	-3.54%
2135 - Indirect Payable	\$76,297.76	\$76,297.76	\$0.00	0.00%
2150 - Home Loan Escrow Accounts	\$577.01	(\$580.61)	\$1,157.62	-199.38%
2160 - Due to (Liab)	\$22,255.06	\$10,117.70	\$12,137.36	119.96%
2180 - Accrued Payroll Deductions	(\$7,863.07)	(\$7,601.21)	(\$261.86)	3.44%
Total - 2100 - Accrued liabilities	\$1,018,492.29	\$1,357,236.17	(\$338,743.88)	-24.96%
2400 - Refundable Advances				
2450 - Apartment Sec Deposits Payable	\$28,980.50	\$27,400.50	\$1,580.00	5.77%
2455 - Sales Taxes Payable	\$305.00	\$0.00	\$305.00	0.00%
Total - 2400 - Refundable Advances	\$29,285.50	\$27,400.50	\$1,885.00	6.88%
Total Other Current Liability	\$1,047,777.79	\$1,384,636.67	(\$336,858.88)	-24.33%
Total Current Liabilities	\$1,034,608.16	\$1,365,104.79	(\$330,496.63)	-24.21%
Long Term Liabilities				
2700 - Long-term notes & loans payable				

FINANCIAL ROW	AMOUNT (AS OF MAY 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
2770 - Long-term liabilities - Mower Loan	\$2,630.04	\$4,100.28	(\$1,470.24)	-35.86%
2780 - Lease liability	\$727.94	\$727.94	\$0.00	0.00%
Total - 2700 - Long-term notes & loans payable	\$3,357.98	\$4,828.22	(\$1,470.24)	-30.45%
Total Long Term Liabilities	\$3,357.98	\$4,828.22	(\$1,470.24)	-30.45%
Equity	\$19,253,989.95	\$20,893,824.42	(\$1,639,834.47)	-7.85%
Total Liabilities & Equity	\$20,291,956.09	\$22,263,757.43	(\$1,971,801.34)	-8.86%

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

FINANCIAL ROW	AMOUNT (JAN 2024 - MAY 2024)	COMPARATIVE AMOUNT (JAN 2023 - ADJUST 2023)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$11,929.69	\$42,867.82	(\$30,938.13)	-72.17%
4100 - Inkind Revenue	\$370,177.96	\$1,268,433.18	(\$898,255.22)	-70.82%
4200 - Miscellaneous Revenue	\$521,554.81	\$3,707,973.17	(\$3,186,418.36)	-85.93%
4400 - State Revenue	\$707,680.86	\$1,306,616.44	(\$598,935.58)	-45.84%
4500 - Federal Revenue	\$5,607,959.07	\$15,173,576.22	(\$9,565,617.15)	-63.04%
4900 - Recoveries from Programs	\$1,453,869.68	\$3,631,342.57	(\$2,177,472.89)	-59.96%
5000 - Rental Revenue	\$310,856.21	\$657,610.55	(\$346,754.34)	-52.73%
5100 - Program Fee Revenue	\$607,853.11	\$1,723,429.39	(\$1,115,576.28)	-64.73%
5300 - Interest and Dividends	\$132,093.73	\$178,422.14	(\$46,328.41)	-25.97%
5400 - Revenue from other sources	\$297,085.91	\$1,736,410.96	(\$1,439,325.05)	-82.89%
5800 - Special Event Expense	\$2,850.00	\$8,795.33	(\$5,945.33)	-67.60%
Total - Income	\$10,023,911.03	\$29,435,477.77	(\$19,411,566.74)	-65.95%
Cost Of Sales				
8000 - Cost of Goods Sold	\$982.19	\$169.31	\$812.88	480.11%
Total - Cost Of Sales	\$982.19	\$169.31	\$812.88	480.11%
Gross Profit	\$10,022,928.84	\$29,435,308.46	(\$19,412,379.62)	-65.95%
Expense				
7000 - Grants, contracts, & direct assistance	\$307,263.06	\$1,922,010.30	(\$1,614,747.24)	-84.01%
7200 - Salaries & related expenses	\$4,814,854.15	\$11,604,662.93	(\$6,789,808.78)	-58.51%
7300 - Indirect Cost Pool Expense	\$851,937.76	\$1,917,677.75	(\$1,065,739.99)	-55.57%
7500 - Contract/Consultant Services	\$688,966.76	\$1,695,750.90	(\$1,006,784.14)	-59.37%
8100 - Non personnel expenses	\$547,012.06	\$1,174,985.36	(\$627,973.30)	-53.45%
8200 - Facility & equipment expenses	\$1,057,487.70	\$2,236,740.58	(\$1,179,252.88)	-52.72%
8300 - Travel & meetings expenses	\$243,744.25	\$635,710.62	(\$391,966.37)	-61.66%
8400 - Insurance Expense	\$1,238,632.06	\$2,043,164.06	(\$804,532.00)	-39.38%
8600 - Business expenses	\$918.50	\$8,063.62	(\$7,145.12)	-88.61%
8700 - Food Expenses	\$643,659.58	\$1,609,006.95	(\$965,347.37)	-60.00%
8800 - In-Kind Expenses	\$370,177.96	\$1,268,433.18	(\$898,255.22)	-70.82%
Total - Expense	\$10,764,653.84	\$26,116,206.25	(\$15,351,552.41)	-58.78%
Net Ordinary Income	(\$741,725.00)	\$3,319,102.21	(\$4,060,827.21)	-122.35%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$898,099.57	\$1,661,946.62	(\$763,847.05)	-45.96%
Total - Other Expense	\$898,099.57	\$1,661,946.62	(\$763,847.05)	-45.96%
Net Other Income	(\$898,099.57)	(\$1,661,946.62)	\$763,847.05	-45.96%
Net Income	(\$1,639,824.57)	\$1,657,155.59	(\$3,296,980.16)	-198.95%

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

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	\$9,510,792.77
1020 - Payroll Account	\$382,125.79
1021 - First United Accounts Payable	\$16,558.39
1022 - First United TH Reserve	\$142,527.47
1023 - First United General Escrow	\$86,801.37
1024 - First United Marina License	\$221.97
1025 - First United Deposit (PayPal)	\$2,115.20
1028 - First United Unrestricted Funds CD	\$822,783.89
1030 - Shamrock Bank - Clayton	\$1,843.37
1040 - Petty Cash	\$410.00
1050 - McCurtain County National Bank	\$7,326.60
1070 - Fund to Fund Allocation Transfers	\$132,141.25
Total - 1000 - Cash	\$11,105,648.07
Total Bank	\$11,105,648.07
Accounts Receivable	
1100 - Receivables	
1105 - Accrued Acct Receivable	\$234,532.68
1110 - Accounts Receivable	\$143,521.72
1120 - Due From (A/R)	(\$3,003.00)
Total - 1100 - Receivables	\$375,051.40
1300 - Other receivables	
1320 - Notes/loans receivable	\$334,632.06
1321 - Loans Receivable from Belmont	\$165,896.48
1322 - Loans Receivable from Clayton	\$204,532.53
1323 - Loans Receivable rom Kiamichi	\$123,563.90
1324 - Loans Receivable from SOCDC	\$422,001.57
1326 - Loans Receivable from Rouleau House	\$51,909.76
Total - 1300 - Other receivables	\$1,302,536.30
Total Accounts Receivable	\$1,677,587.70
Other Current Asset	
1400 - Other assets	
1465 - Advances Paid	\$4,607.77
Total - 1400 - Other assets	\$4,607.77
1500 - Investments	
1530 - Property/Lots held for Sale	\$375,516.35
1599 - Undeposited Funds	\$2,049.88
Total - 1500 - Investments	\$377,566.23
NS097 - Interfund Due to /Due from	(\$0.01)
Payroll Float	\$1,459.05
Total Other Current Asset	\$383,633.04
Total Current Assets	\$13,166,868.81
Fixed Assets	
1600 - Fixed operating assets	
1610 - Land	\$1,087,094.00
1620 - Buildings	\$7,056,276.04
1630 - Leasehold Improvements	\$2,123,010.79
1640 - Computers & Equipment over \$5,000	\$900,393.01
1650 - Vehicles	\$3,609,015.32

FINANCIAL ROW	AMOUNT
Total - 1600 - Fixed operating assets	\$14,775,789.16
1700 - Accum deprec - fixed operating assets	
1725 - Accum deprec - building	(\$5,578,660.84)
1735 - Accum amort - leasehold improvements	(\$2,072,640.82)
1740 - Accum. Amortization Leases	(\$16,116.90)
Total - 1700 - Accum deprec - fixed operating assets	(\$7,667,418.56)
Total Fixed Assets	\$7,108,370.60
Other Assets	
1800 - Other Assets	
1810 - Right to Use Asset - Leases	\$16,729.67
1950 - Stale Dated Payables	(\$12.99)
Total - 1800 - Other Assets	\$16,716.68
Total Other Assets	\$16,716.68
Total ASSETS	\$20,291,956.09
Liabilities & Equity	
Current Liabilities	
Accounts Payable	
2000 - Payables	
2010 - AP Accrued monthly	(\$13,169.63)
Total - 2000 - Payables	(\$13,169.63)
Total Accounts Payable	(\$13,169.63)
Other Current Liability	
2100 - Accrued liabilities	
2105 - Accrued Expense Payables	\$253,000.55
2110 - Wages Payable	\$352,669.53
2120 - Accrued Employee Benefits	\$292,566.11
2130 - Accrued payroll taxes	\$28,989.34
2135 - Indirect Payable	\$76,297.76
2150 - Home Loan Escrow Accounts	\$577.01
2160 - Due to (Liab)	\$22,255.06
2180 - Accrued Payroll Deductions	(\$7,863.07)
Total - 2100 - Accrued liabilities	\$1,018,492.29
2400 - Refundable Advances	
2450 - Apartment Sec Deposits Payable	\$28,980.50
2455 - Sales Taxes Payable	\$305.00
Total - 2400 - Refundable Advances	\$29,285.50
Total Other Current Liability	\$1,047,777.79
Total Current Liabilities	\$1,034,608.16
Long Term Liabilities	
2700 - Long-term notes & loans payable	
2770 - Long-term liabilities - Mower Loan	\$2,630.04
2780 - Lease liability	\$727.94
Total - 2700 - Long-term notes & loans payable	\$3,357.98
Total Long Term Liabilities	\$3,357.98
Equity	
3000 - Net Assets	\$12,712.37
Retained Earnings	\$20,881,102.15
Net Income	(\$1,639,824.57)
Total Equity	\$19,253,989.95
Total Liabilities & Equity	\$20,291,956.09

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

FINANCIAL ROW	- UNASSIGNED Amount	CAPITAL Amount	FUNDRAISING Amount	MANAGEMENT & GENERAL (ADMIN) Amount	OTHER Amount	PROGRAM SERVICES Amount	TOTAL Amount
Operating Activities							
Net Income	(\$2,045,614.15)	(\$30,427.93)	\$739.39	(\$4,283.86)	\$252.47	\$439,509.51	(\$1,639,824.57)
Adjustments to Net Income							
Accounts Receivable	\$1,520,131.47	\$883.76	\$0.00	\$214,710.62	\$0.00	(\$17,811.36)	\$1,717,914.49
Other Current Asset	\$279,938.09	\$0.00	\$0.00	(\$59,184.96)	\$0.00	(\$200,191.79)	\$20,561.34
Accounts Payable	\$6,367.67	\$0.00	\$0.00	\$11,319.87	\$0.00	(\$11,325.29)	\$6,362.25
Sales Tax Payable	\$6,098.50	\$0.00	\$0.00	\$0.00	\$0.00	(\$5,793.50)	\$305.00
Other Current Liabilities	\$322,530.01	\$0.00	\$0.00	(\$46,567.62)	\$0.00	(\$613,126.27)	(\$337,163.88)
Total Adjustments to Net Income	\$2,135,065.74	\$883.76	\$0.00	\$120,277.91	\$0.00	(\$848,248.21)	\$1,407,979.20
Total Operating Activities	\$89,451.59	(\$29,544.17)	\$739.39	\$115,994.05	\$252.47	(\$408,738.70)	(\$231,845.37)
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	(\$1,470.24)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$1,470.24)
Other Equity	\$0.00	\$0.00	\$0.00	(\$585,592.75)	\$0.00	\$585,582.85	(\$9.90)
Total Financing Activities	(\$1,470.24)	\$0.00	\$0.00	(\$585,592.75)	\$0.00	\$585,582.85	(\$1,480.14)
Net Change in Cash for Period	\$87,981.35	(\$29,544.17)	\$739.39	(\$469,598.70)	\$252.47	\$176,857.14	(\$233,312.52)
Cash at Beginning of Period	\$21,701,778.63	\$2,732.89	\$964.22	(\$8,924,130.62)	\$182.72	(\$1,440,517.37)	\$11,341,010.47
Cash at End of Period	\$21,789,759.98	(\$26,811.28)	\$1,703.61	(\$9,393,729.32)	\$435.19	(\$1,263,660.23)	\$11,107,697.95

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$1,639,824.57)
Adjustments to Net Income	
Accounts Receivable	\$1,717,914.49
Other Current Asset	\$20,561.34
Accounts Payable	\$6,362.25
Sales Tax Payable	\$305.00
Other Current Liabilities	(\$337,163.88)
Total Adjustments to Net Income	\$1,407,979.20
Total Operating Activities	(\$231,845.37)
Investing Activities	
Other Asset	\$12.99
Total Investing Activities	\$12.99
Financing Activities	
Long Term Liabilities	(\$1,470.24)
Other Equity	(\$9.90)
Total Financing Activities	(\$1,480.14)
Net Change in Cash for Period	(\$233,312.52)
Cash at Beginning of Period	\$11,341,010.47
Cash at End of Period	\$11,107,697.95

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$1,639,824.57)
Adjustments to Net Income	
Accounts Receivable	\$1,717,914.49
Other Current Asset	\$20,561.34
Accounts Payable	\$6,362.25
Sales Tax Payable	\$305.00
Other Current Liabilities	(\$337,163.88)
Total Adjustments to Net Income	\$1,407,979.20
Total Operating Activities	(\$231,845.37)
Investing Activities	
Other Asset	\$12.99
Total Investing Activities	\$12.99
Financing Activities	
Long Term Liabilities	(\$1,470.24)
Other Equity	(\$9.90)
Total Financing Activities	(\$1,480.14)
Net Change in Cash for Period	(\$233,312.52)
Cash at Beginning of Period	\$11,341,010.47
Cash at End of Period	\$11,107,697.95

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

Monthly distribution of Revenue by Revenue Type and Subtype

REVENUE STREAM	JANUARY 2024	FEBRUARY 2024	MARCH 2024	APRIL 2024	MAY 2024	TOTAL
Federal Grants	\$117,217.36	\$1,260,812.63	\$1,081,246.59	\$943,684.66	\$1,077,863.75	\$4,480,824.99
Recoveries	\$230,807.48	\$385,947.94	\$327,432.04	\$343,613.45	\$285,690.32	\$1,573,491.23
Federal Pass Through	\$58,988.22	\$289,093.02	\$383,252.19	\$180,765.22	\$142,921.44	\$1,055,020.09
State Contracts	\$306,224.18	\$14,188.85	\$78,557.56	\$192,989.44	\$17,970.50	\$609,930.53
Non Federal	\$55,099.49	\$71,588.39	\$55,383.46	\$245,800.76	\$191,720.54	\$619,592.64
Federal Contract		\$109,235.23	\$235,792.08		\$113,233.27	\$458,260.58
Program Revenue	\$98,661.88	\$142,987.95	\$131,664.91	\$194,862.65	\$162,923.47	\$731,100.86
Federal	\$83,594.49					\$83,594.49
State Pass Through	\$13,330.75	\$74,577.70	\$24,772.96	\$26,416.91	\$8,530.16	\$147,628.48
Transit Contract	\$26,604.08	\$15,660.35	\$25,742.51	\$29,000.27	\$17,574.75	\$114,581.96
Apartment Revenue	\$16,589.00	\$16,589.00	\$16,589.00	\$11,630.00	\$11,630.00	\$73,027.00
State Grants	\$309.60	\$8,524.73	\$8,432.42	\$8,623.84	\$1,293.62	\$27,184.21
- Unassigned -	(\$1,241.92)			\$494.95	\$7,402.95	\$6,655.98
Transit Fares	\$6,391.90	\$5,291.65	\$7,239.75	\$4,201.05	\$5,642.20	\$28,766.55
Management Fees	\$2,036.43	\$1,904.39	\$2,985.21	\$2,071.77	\$2,030.53	\$11,028.33
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
Other Contract Revenue	(\$815.64)					(\$815.64)
Total	\$1,013,807.71	\$2,398,910.84	\$2,379,100.58	\$2,185,664.40	\$2,046,427.50	\$10,023,911.03

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

FYTD Agency Budget

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$25,620.00	\$11,929.69	\$13,690.31	46.56%
4100 - Inkind Revenue	\$1,647,817.00	\$370,177.96	\$1,277,639.04	22.46%
4200 - Miscellaneous Revenue	\$10,000.00	\$537,554.81	(\$527,554.81)	5,375.55%
4400 - State Revenue	\$1,476,608.42	\$760,058.86	\$716,549.56	51.47%
4500 - Federal Revenue	\$13,988,562.11	\$5,684,129.14	\$8,304,432.97	40.63%
4900 - Recoveries from Programs	\$2,012,486.97	\$1,453,869.68	\$558,617.29	72.24%
5000 - Rental Revenue	\$0.00	\$329,125.21	(\$329,125.21)	0.00%
5100 - Program Fee Revenue	\$0.00	\$608,115.85	(\$608,115.85)	0.00%
5300 - Interest and Dividends	\$0.00	\$133,106.30	(\$133,106.30)	0.00%
5400 - Revenue from other sources	\$0.00	\$297,085.91	(\$297,085.91)	0.00%
5800 - Special Event Expense	\$0.00	\$2,850.00	(\$2,850.00)	0.00%
Total - Income	\$19,161,094.50	\$10,188,003.41	\$8,973,091.09	53.17%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$982.19	(\$982.19)	0.00%
Total - Cost Of Sales	\$0.00	\$982.19	(\$982.19)	0.00%
Gross Profit	\$19,161,094.50	\$10,187,021.22	\$8,974,073.28	53.17%
Expense				
7000 - Grants, contracts, & direct assistance	\$24,599.15	\$307,263.06	(\$282,663.91)	1,249.08%
7200 - Salaries & related expenses	\$10,112,350.05	\$5,295,966.95	\$4,816,383.10	52.37%
7300 - Indirect Cost Pool Expense	\$1,670,138.22	\$935,412.32	\$734,725.90	56.01%
7500 - Contract/Consultant Services	\$444,010.81	\$693,426.26	(\$249,415.45)	156.17%
8100 - Non personnel expenses	\$721,051.26	\$554,002.92	\$167,048.34	76.83%
8200 - Facility & equipment expenses	\$1,083,178.15	\$1,060,521.20	\$22,656.95	97.91%
8300 - Travel & meetings expenses	\$953,467.66	\$247,575.37	\$705,892.29	25.97%
8400 - Insurance Expense	\$81,915.40	\$1,238,984.84	(\$1,157,069.44)	1,512.52%
8600 - Business expenses	\$0.00	\$918.50	(\$918.50)	0.00%
8700 - Food Expenses	\$85,570.00	\$643,977.87	(\$558,407.87)	752.57%
8800 - In-Kind Expenses	\$1,454,726.00	\$370,177.96	\$1,084,548.04	25.45%
Total - Expense	\$16,631,006.70	\$11,348,227.25	\$5,282,779.45	68.24%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,865,541.13	\$911,911.36	\$953,629.77	48.88%
Total - Other Expense	\$1,865,541.13	\$911,911.36	\$953,629.77	48.88%
Net Income	\$664,546.67	(\$2,073,117.39)	\$2,737,664.06	-311.96%

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

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	<i>Operating</i> 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	\$14,757.59	(\$14,757.59)	0.00%
4400 - State Revenue	\$0.00	\$282,091.92	(\$282,091.92)	0.00%
4900 - Recoveries from Programs	\$2,012,486.97	\$1,453,869.68	\$558,617.29	72.24%
5300 - Interest and Dividends	\$0.00	\$21,872.89	(\$21,872.89)	0.00%
5400 - Revenue from other sources	\$0.00	\$264,669.01	(\$264,669.01)	0.00%
Total - Income	\$2,012,486.97	\$2,038,563.51	(\$26,076.54)	101.30%
Gross Profit	\$2,012,486.97	\$2,038,563.51	(\$26,076.54)	101.30%
Expense				
7200 - Salaries & related expenses	\$1,480,512.38	\$546,907.15	\$933,605.23	36.94%
7300 - Indirect Cost Pool Expense	\$0.00	\$22,303.06	(\$22,303.06)	0.00%
7500 - Contract/Consultant Services	\$115,215.21	\$84,275.02	\$30,940.19	73.15%
8100 - Non personnel expenses	\$54,841.35	\$145,372.42	(\$90,531.07)	265.08%
8200 - Facility & equipment expenses	\$40,902.28	\$129,767.97	(\$88,865.69)	317.26%
8300 - Travel & meetings expenses	\$82,133.76	\$32,663.84	\$49,469.92	39.77%
8400 - Insurance Expense	\$34,962.98	\$711,169.60	(\$676,206.62)	2,034.06%
8700 - Food Expenses	\$0.00	\$6,945.63	(\$6,945.63)	0.00%
Total - Expense	\$1,808,567.96	\$1,679,404.69	\$129,163.27	92.86%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$153,301.25	\$259,582.36	(\$106,281.11)	169.33%
Total - Other Expense	\$153,301.25	\$259,582.36	(\$106,281.11)	169.33%
Net Income	\$50,617.76	\$99,576.46	(\$48,958.70)	196.72%

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

Financial Row	- No Department -		10 Operating		Total
			Administration	Building Funds	
	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	\$14,757.59	\$0.00	\$14,757.59
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	\$1,453,869.68	\$0.00	\$1,453,869.68
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$127,626.65	\$127,626.65
5100 - Program Fee Revenue	\$13,795.12	\$0.00	\$0.00	\$0.00	\$0.00
5300 - Interest and Dividends	\$0.00	(\$193.26)	\$21,872.89	\$508.82	\$22,188.45
5400 - Revenue from other sources	\$0.00	(\$89,669.01)	\$264,669.01	\$78,337.40	\$253,337.40
5800 - Special Event Expense	\$40.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$13,694.48	(\$89,862.27)	\$2,038,563.51	\$206,472.87	\$2,155,174.11
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	\$623,107.63	\$0.00	\$488,220.89	\$0.00	\$488,220.89
7300 - Indirect Cost Pool Expense	\$88,713.81	\$0.00	\$20,427.40	\$0.00	\$20,427.40
7500 - Contract/Consultant Services	\$50,677.87	\$0.00	\$84,275.02	\$16,051.27	\$100,326.29
8100 - Non personnel expenses	\$29,785.84	\$0.00	\$144,045.26	\$1,496.13	\$145,541.39
8200 - Facility & equipment expenses	\$61,690.40	\$0.00	\$129,767.97	\$103,509.57	\$233,277.54
8300 - Travel & meetings expenses	\$1,233.98	\$0.00	\$32,461.50	\$702.16	\$33,163.66
8400 - Insurance Expense	\$1,880.05	\$0.00	\$711,169.60	\$49,265.00	\$760,434.60
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$911.00	\$911.00
8700 - Food Expenses	\$66,967.00	\$121.21	\$6,945.63	\$4.06	\$7,070.90
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$924,056.58	\$121.21	\$1,617,313.27	\$171,939.19	\$1,789,373.67
Net Ordinary Income	(\$910,362.10)	(\$89,983.48)	\$421,250.24	\$34,533.68	\$365,800.44
Other Income and Expenses					
Other Expense					
8500 - Other Expense	\$21,805.13	\$0.00	\$259,049.77	\$2,492.50	\$261,542.27
Total - Other Expense	\$21,805.13	\$0.00	\$259,049.77	\$2,492.50	\$261,542.27

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

Early Childhood

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	\$337,813.12	\$539,874.88	38.49%
4200 - Miscellaneous Revenue	\$0.00	\$466,772.28	(\$466,772.28)	0.00%
4400 - State Revenue	\$0.00	\$77,085.31	(\$77,085.31)	0.00%
4500 - Federal Revenue	\$4,773,437.00	\$3,316,034.46	\$1,457,402.54	69.47%
5100 - Program Fee Revenue	\$0.00	\$232,360.40	(\$232,360.40)	0.00%
5300 - Interest and Dividends	\$0.00	\$11,670.97	(\$11,670.97)	0.00%
Total - Income	\$5,661,125.00	\$4,441,736.54	\$1,219,388.46	78.46%
Gross Profit	\$5,661,125.00	\$4,441,736.54	\$1,219,388.46	78.46%
Expense				
7200 - Salaries & related expenses	\$3,568,148.23	\$2,147,029.80	\$1,421,118.43	60.17%
7300 - Indirect Cost Pool Expense	\$700,905.77	\$425,950.40	\$274,955.37	60.77%
7500 - Contract/Consultant Services	\$49,200.00	\$382,252.70	(\$333,052.70)	776.94%
8100 - Non personnel expenses	\$88,129.00	\$223,802.17	(\$135,673.17)	253.95%
8200 - Facility & equipment expenses	\$113,993.00	\$94,122.15	\$19,870.85	82.57%
8300 - Travel & meetings expenses	\$85,204.00	\$45,502.02	\$39,701.98	53.40%
8400 - Insurance Expense	\$37,000.00	\$128,714.72	(\$91,714.72)	347.88%
8700 - Food Expenses	\$70,870.00	\$561,957.01	(\$491,087.01)	792.94%
8800 - In-Kind Expenses	\$684,597.00	\$337,813.12	\$346,783.88	49.34%
Total - Expense	\$5,398,047.00	\$4,347,144.09	\$1,050,902.91	80.53%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$100,587.00	\$233,058.59	(\$132,471.59)	231.70%
Total - Other Expense	\$100,587.00	\$233,058.59	(\$132,471.59)	231.70%
Net Income	\$162,491.00	(\$138,466.14)	\$300,957.14	-85.21%

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

Financial Row	20 Early Childhood								
		Daycare Homes	Early Head Start - CC	Early Learning Centers		HS/EHS		Total	Total
	Amount	Amount	Amount	Amount	Amount	EHS Amount	Head Start 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
4100 - Inkind Revenue	\$0.00	\$0.00	\$1,179.21	\$7,089.65	\$0.00	\$0.00	\$329,544.26	\$329,544.26	\$337,813.12
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$193,879.59	\$173,503.49	\$0.00	\$83,389.20	\$256,892.69	\$450,772.28
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$77,085.31	\$77,085.31	\$77,085.31
4500 - Federal Revenue	\$0.00	\$388,133.82	\$757,852.66	\$30,232.01	\$0.00	\$0.00	\$2,139,815.97	\$2,139,815.97	\$3,316,034.46
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$168.00	\$0.00	\$0.00	\$232,192.40	\$0.00	\$0.00	\$0.00	\$0.00	\$232,360.40
5300 - Interest and Dividends	\$0.00	\$0.00	\$0.00	\$4,311.28	\$7,333.41	\$0.00	\$26.28	\$7,359.69	\$11,670.97
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$168.00	\$388,133.82	\$759,031.87	\$467,704.93	\$180,836.90	\$0.00	\$2,629,861.02	\$2,810,697.92	\$4,425,736.54
8000 - Cost of Goods Sold									
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expense									
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$71,238.67	\$36,986.50	\$249,818.56	\$252,561.34	\$12,108.82	\$280,193.12	\$1,036,077.77	\$1,328,379.71	\$1,938,984.78
7300 - Indirect Cost Pool Expense	\$13,835.07	\$7,252.02	\$49,207.51	\$44,135.02	\$5,505.33	\$54,258.91	\$210,373.46	\$270,137.70	\$384,567.32
7500 - Contract/Consultant Services	\$0.00	\$2,229.00	\$330,585.50	\$1,317.75	\$28,889.00	\$0.00	\$18,365.95	\$47,254.95	\$381,387.20
8100 - Non personnel expenses	\$3,265.71	\$1,156.21	\$57,724.96	\$16,067.76	\$11,796.00	\$77.99	\$131,934.08	\$143,808.07	\$222,022.71
8200 - Facility & equipment expenses	\$152.50	\$1,870.00	\$4,862.66	\$6,115.24	\$16,937.57	\$257.13	\$63,736.24	\$80,930.94	\$93,931.34
8300 - Travel & meetings expenses	\$68.12	\$11,631.09	\$5,625.44	\$2,679.33	\$396.41	\$51.00	\$24,846.94	\$25,294.35	\$45,298.33
8400 - Insurance Expense	\$0.00	\$0.00	\$15,821.80	\$24,527.80	\$4.00	\$0.00	\$88,361.12	\$88,365.12	\$128,714.72
8600 - Business expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$273.36	\$332,949.82	\$14.22	\$45,815.83	\$9,664.48	\$0.00	\$172,921.01	\$182,585.49	\$561,638.72
8800 - In-Kind Expenses	\$0.00	\$0.00	\$1,179.21	\$7,089.65	\$0.00	\$0.00	\$329,544.26	\$329,544.26	\$337,813.12
Total - Expense	\$88,833.43	\$394,074.64	\$714,839.86	\$400,309.72	\$85,301.61	\$334,838.15	\$2,076,160.83	\$2,496,300.59	\$4,094,358.24
Net Ordinary Income	(\$88,665.43)	(\$5,940.82)	\$44,192.01	\$67,395.21	\$95,535.29	(\$334,838.15)	\$553,700.19	\$314,397.33	\$331,378.30
Other Income and Expenses									
Other Expense									
8500 - Other Expense	\$0.00	\$59.70	\$123,281.18	\$3,045.89	\$10,372.33	\$0.00	\$94,637.69	\$105,010.02	\$231,396.79
Total - Other Expense	\$0.00	\$59.70	\$123,281.18	\$3,045.89	\$10,372.33	\$0.00	\$94,637.69	\$105,010.02	\$231,396.79

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

Community Service

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$15,620.00	\$10,618.27	\$5,001.73	67.98%
4100 - Inkind Revenue	\$582,629.00	\$32,364.84	\$550,264.16	5.55%
4200 - Miscellaneous Revenue	\$10,000.00	\$3,774.65	\$6,225.35	37.75%
4400 - State Revenue	\$1,476,608.42	\$252,209.70	\$1,224,398.72	17.08%
4500 - Federal Revenue	\$6,020,217.00	\$984,146.31	\$5,036,070.69	16.35%
5300 - Interest and Dividends	\$0.00	\$564.81	(\$564.81)	0.00%
5400 - Revenue from other sources	\$0.00	\$24,599.15	(\$24,599.15)	0.00%
5800 - Special Event Expense	\$0.00	\$2,480.00	(\$2,480.00)	0.00%
Total - Income	\$8,105,074.42	\$1,310,757.73	\$6,794,316.69	16.17%
Gross Profit	\$8,105,074.42	\$1,310,757.73	\$6,794,316.69	16.17%
Expense				
7000 - Grants, contracts, & direct assistance	\$24,599.15	\$34,061.60	(\$9,462.45)	138.47%
7200 - Salaries & related expenses	\$3,952,868.15	\$717,164.55	\$3,235,703.60	18.14%
7300 - Indirect Cost Pool Expense	\$745,605.19	\$143,271.09	\$602,334.10	19.22%
7500 - Contract/Consultant Services	\$261,279.00	\$65,593.53	\$195,685.47	25.10%
8100 - Non personnel expenses	\$511,032.61	\$54,744.30	\$456,288.31	10.71%
8200 - Facility & equipment expenses	\$235,312.71	\$63,666.43	\$171,646.28	27.06%
8300 - Travel & meetings expenses	\$307,681.90	\$45,435.49	\$262,246.41	14.77%
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	\$14,700.00	\$7,317.18	\$7,382.82	49.78%
8800 - In-Kind Expenses	\$582,629.00	\$32,364.84	\$550,264.16	5.55%
Total - Expense	\$6,635,757.71	\$1,168,179.51	\$5,467,578.20	17.60%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,469,316.00	\$133,009.37	\$1,336,306.63	9.05%
Total - Other Expense	\$1,469,316.00	\$133,009.37	\$1,336,306.63	9.05%
Net Income	\$0.71	\$9,568.85	(\$9,568.14)	1,347,725.35%

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

Financial Row	30 Community Service															
	CASA	Community Services	Drug Free Communities	Emergency Services	EFSP	Total	Healthy Start	Mentoring	RCOR TRI-CORP	RSVP	Healing Hearts	Second Chance	VOCA	Youth Build	Total	
Ordinary Income/Expense	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	
Income																
4000 - Contribution Revenue	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,595.00	\$0.00	\$0.00	\$0.00	\$4,523.27	\$10,618.27	
4100 - In-kind Revenue	\$0.00	\$0.00	\$0.00	\$25,013.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,351.74	\$0.00	\$0.00	\$0.00	\$0.00	\$32,364.84	
4200 - Miscellaneous Revenue	\$0.00	\$1,274.65	\$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	\$169,647.55	\$4,177.94	\$78,384.21	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$252,209.70	
4500 - Federal Revenue	\$0.00	\$0.00	\$25,894.01	\$32,599.00	\$0.00	\$0.00	\$351,148.09	\$1,101.89	\$134,678.84	\$11,918.10	\$50,854.98	\$78,318.54	\$40,826.79	\$180,636.00	\$907,976.24	
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	
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	
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	
5300 - Interest and Dividends	\$15.41	\$79.31	\$26.35	\$28.08	\$10.10	\$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	\$7,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,099.15	\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$24,599.15	
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	\$980.00	\$0.00	\$1,500.00	\$2,480.00	
Total - Income	\$169,662.96	\$13,531.90	\$104,304.57	\$57,640.18	\$10.10	\$0.00	\$10.10	\$353,655.37	\$9,254.99	\$134,691.99	\$33,869.74	\$50,854.98	\$79,311.83	\$41,134.80	\$1,234,587.66	
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	
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	
Expense																
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$24,599.15	\$0.00	\$1,893.62	\$2,622.21	\$4,515.83	\$0.00	\$0.00	\$0.00	\$0.00	\$2,679.72	\$0.00	\$2,266.90	\$0.00	\$34,061.60
7200 - Salaries & related expenses	\$75,843.77	\$0.00	\$10,656.69	\$20,396.08	\$0.00	\$0.00	\$0.00	\$225,076.66	\$2,826.12	\$97,701.99	\$23,207.35	\$20,676.17	\$47,113.04	\$40,029.13	\$80,614.80	\$644,141.80
7300 - Indirect Cost Pool Expense	\$14,948.11	\$0.00	\$2,086.86	\$4,003.56	\$0.00	\$0.00	\$0.00	\$45,008.38	\$546.08	\$19,443.16	\$4,869.50	\$4,066.23	\$9,545.62	\$7,841.89	\$16,517.25	\$128,876.64
7500 - Contract/Consultant Services	\$1,580.00	\$0.00	\$10,700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27,342.09	\$0.00	\$500.00	\$0.00	\$403.76	\$22,222.00	\$0.00	\$705.68	\$63,453.53
8100 - Non personnel expenses	\$17,326.86	\$330.77	\$2,275.77	\$15.43	\$0.00	\$0.00	\$0.00	\$12,991.76	\$576.54	\$9,406.86	\$654.90	\$1,128.47	\$3,810.71	\$387.40	\$5,339.54	\$54,245.01
8200 - Facility & equipment expenses	\$24,741.45	\$684.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$14,220.00	\$0.00	\$3,826.98	\$1,295.00	\$2,697.50	\$1,900.00	\$1,951.50	\$12,350.00	\$63,666.43
8300 - Travel & meetings expenses	\$1,482.29	\$1,358.09	\$554.70	\$132.92	\$0.00	\$0.00	\$0.00	\$12,250.68	\$1,262.62	\$6,931.89	\$901.43	\$2,477.66	\$5,868.53	\$1,239.50	\$9,193.39	\$43,653.70
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	\$1,514.71	\$0.00	\$0.00	\$255.57	\$0.00	\$0.00	\$0.00	\$3,870.87	\$0.00	\$578.36	\$933.19	\$0.00	\$0.00	\$0.00	\$164.48	\$7,317.18
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$25,013.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,351.74	\$0.00	\$0.00	\$0.00	\$0.00	\$32,364.84
Total - Expense	\$137,437.19	\$2,372.86	\$50,873.17	\$49,816.66	\$1,893.62	\$2,622.21	\$4,515.83	\$340,784.44	\$5,211.36	\$138,389.24	\$39,213.11	\$34,129.51	\$90,459.90	\$53,716.32	\$129,421.64	\$1,076,341.23
Net Ordinary Income	\$32,225.77	\$11,159.04	\$53,431.40	\$7,823.52	(\$1,883.52)	(\$2,622.21)	(\$4,505.73)	\$12,870.93	\$4,043.63	(\$3,697.25)	(\$5,343.37)	\$16,725.47	(\$11,148.07)	(\$12,581.52)	\$57,242.61	\$158,246.43
Other Income and Expenses																
Other Expense																
8500 - Other Expense	\$46,127.70	\$2,639.02	\$5,580.00	\$7,597.35	\$0.00	\$0.00	\$0.00	\$14,490.76	\$4.70	\$744.69	\$114.55	\$409.21	\$2,747.25	\$214.77	\$51,774.37	\$132,444.37
Total - Other Expense	\$46,127.70	\$2,639.02	\$5,580.00	\$7,597.35	\$0.00	\$0.00	\$0.00	\$14,490.76	\$4.70	\$744.69	\$114.55	\$409.21	\$2,747.25	\$214.77	\$51,774.37	\$132,444.37

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	\$51,435.93	(\$51,435.93)	0.00%
4400 - State Revenue	\$0.00	\$4,606.25	(\$4,606.25)	0.00%
4500 - Federal Revenue	\$3,194,908.11	\$1,303,303.45	\$1,891,604.66	40.79%
5000 - Rental Revenue	\$0.00	\$201,498.56	(\$201,498.56)	0.00%
5100 - Program Fee Revenue	\$0.00	\$60,538.61	(\$60,538.61)	0.00%
5300 - Interest and Dividends	\$0.00	\$86,850.95	(\$86,850.95)	0.00%
5400 - Revenue from other sources	\$0.00	\$6,125.00	(\$6,125.00)	0.00%
Total - Income	\$3,382,408.11	\$1,714,358.75	\$1,668,049.36	50.68%
Gross Profit	\$3,382,408.11	\$1,714,358.75	\$1,668,049.36	50.68%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$260,607.00	(\$260,607.00)	0.00%
7200 - Salaries & related expenses	\$1,110,821.29	\$707,711.70	\$403,109.59	63.71%
7300 - Indirect Cost Pool Expense	\$223,627.26	\$144,247.55	\$79,379.71	64.50%
7500 - Contract/Consultant Services	\$18,316.60	\$67,735.22	(\$49,418.62)	369.80%
8100 - Non personnel expenses	\$67,048.30	\$43,383.75	\$23,664.55	64.71%
8200 - Facility & equipment expenses	\$692,970.16	\$323,180.23	\$369,789.93	46.64%
8300 - Travel & meetings expenses	\$478,448.00	\$49,050.68	\$429,397.32	10.25%
8400 - Insurance Expense	\$9,902.42	\$178,796.54	(\$168,894.12)	1,805.58%
8700 - Food Expenses	\$0.00	\$665.78	(\$665.78)	0.00%
8800 - In-Kind Expenses	\$187,500.00	\$0.00	\$187,500.00	0.00%
Total - Expense	\$2,788,634.03	\$1,775,378.45	\$1,013,255.58	63.66%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$142,336.88	\$152,464.94	(\$10,128.06)	107.12%
Total - Other Expense	\$142,336.88	\$152,464.94	(\$10,128.06)	107.12%
Net Income	\$451,437.20	(\$213,484.64)	\$664,921.84	-47.29%

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

Financial Row	40 Housing Department									
	Apartments		Construction	Apartments (Lift)	Housing Weatherization		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	\$51,435.93	\$0.00	\$51,435.93	\$0.00	\$0.00	\$51,435.93
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$4,606.25	\$0.00	\$4,606.25	\$0.00	\$0.00	\$4,606.25
4500 - Federal Revenue	\$0.00	\$0.00	\$115,675.20	\$0.00	\$530,487.15	\$0.00	\$530,487.15	\$198,880.52	\$458,260.58	\$1,303,303.45
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	\$9,722.50	\$173,507.06	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$183,229.56
5100 - Program Fee Revenue	\$123.14	\$1,663.43	\$0.00	\$11,028.33	\$47,667.96	\$0.00	\$47,667.96	\$55.75	\$0.00	\$60,538.61
5300 - Interest and Dividends	\$73,027.00	\$9,087.60	\$0.00	\$0.00	\$4,736.35	\$0.00	\$4,736.35	\$0.00	\$0.00	\$86,850.95
5400 - Revenue from other sources	\$0.00	\$6,125.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,125.00
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	\$82,872.64	\$190,383.09	\$115,675.20	\$11,028.33	\$638,933.64	\$0.00	\$638,933.64	\$198,936.27	\$458,260.58	\$1,696,089.75
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	\$78,277.00	\$7,330.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175,000.00	\$260,607.00
7200 - Salaries & related expenses	\$26,930.96	\$10,430.52	\$247,112.23	(\$144.82)	(\$1,300.87)	\$8,677.02	\$7,376.15	\$156,285.18	\$187,557.09	\$635,547.31
7300 - Indirect Cost Pool Expense	\$5,704.80	\$2,022.00	\$48,948.19	\$2,526.99	\$43.97	\$1,823.63	\$1,867.60	\$30,285.45	\$38,431.13	\$129,786.16
7500 - Contract/Consultant Services	\$0.00	\$7,888.00	\$14,726.00	\$0.00	\$33,081.00	\$0.00	\$33,081.00	\$0.00	\$11,955.22	\$67,650.22
8100 - Non personnel expenses	\$1,667.40	\$2,566.44	\$17,238.08	\$118.58	\$10,922.18	\$0.00	\$10,922.18	\$3,261.58	\$6,083.36	\$41,857.62
8200 - Facility & equipment expenses	\$8,017.97	\$90,545.18	\$4,690.90	\$1,046.17	\$199,224.39	\$0.00	\$199,224.39	\$8,673.34	\$8,300.00	\$320,497.95
8300 - Travel & meetings expenses	\$51.25	(\$624.63)	\$4,992.16	\$412.72	(\$5,193.93)	\$0.00	(\$5,193.93)	\$22,663.75	\$26,603.30	\$48,904.62
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	\$665.78	\$0.00	\$665.78	\$0.00	\$0.00	\$665.78
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	\$120,649.38	\$276,022.63	\$337,707.56	\$3,959.64	\$259,859.16	\$10,500.65	\$270,359.81	\$221,331.30	\$453,930.10	\$1,683,960.42
Net Ordinary Income	(\$37,776.74)	(\$85,639.54)	(\$222,032.36)	\$7,068.69	\$379,074.48	(\$10,500.65)	\$368,573.83	(\$22,395.03)	\$4,330.48	\$12,129.33
Other Income and Expenses										
Other Expense										
8500 - Other Expense	\$579.45	\$4,996.38	\$32,438.61	\$0.00	\$95,994.54	\$0.00	\$95,994.54	\$478.68	\$6,931.38	\$141,419.04
Total - Other Expense	\$579.45	\$4,996.38	\$32,438.61	\$0.00	\$95,994.54	\$0.00	\$95,994.54	\$478.68	\$6,931.38	\$141,419.04

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	\$104,747.00	(\$104,747.00)	0.00%
4500 - Federal Revenue	\$0.00	\$5,644.92	(\$5,644.92)	0.00%
5100 - Program Fee Revenue	\$0.00	\$153,754.98	(\$153,754.98)	0.00%
5300 - Interest and Dividends	\$0.00	\$609.80	(\$609.80)	0.00%
5400 - Revenue from other sources	\$0.00	\$12,594.46	(\$12,594.46)	0.00%
Total - Income	\$0.00	\$277,351.16	(\$277,351.16)	0.00%
Gross Profit	\$0.00	\$277,351.16	(\$277,351.16)	0.00%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$12,594.46	(\$12,594.46)	0.00%
7200 - Salaries & related expenses	\$0.00	\$407,776.72	(\$407,776.72)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$83,372.95	(\$83,372.95)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$16,110.50	(\$16,110.50)	0.00%
8100 - Non personnel expenses	\$0.00	\$21,558.13	(\$21,558.13)	0.00%
8200 - Facility & equipment expenses	\$0.00	\$119,068.59	(\$119,068.59)	0.00%
8300 - Travel & meetings expenses	\$0.00	\$66,949.67	(\$66,949.67)	0.00%
8400 - Insurance Expense	\$0.00	\$77,641.66	(\$77,641.66)	0.00%
Total - Expense	\$0.00	\$805,072.68	(\$805,072.68)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$92,510.08	(\$92,510.08)	0.00%
Total - Other Expense	\$0.00	\$92,510.08	(\$92,510.08)	0.00%
Net Income	\$0.00	(\$620,231.60)	\$620,231.60	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to May 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	\$153,754.98	\$153,754.98
5300 - Interest and Dividends	\$0.00	\$609.80	\$609.80
5400 - Revenue from other sources	\$0.00	\$12,594.46	\$12,594.46
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00
Total - Income	\$0.00	\$224,973.16	\$224,973.16
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	\$12,594.46	\$12,594.46
7200 - Salaries & related expenses	\$13,547.93	\$354,302.92	\$367,850.85
7300 - Indirect Cost Pool Expense	\$2,744.67	\$72,589.59	\$75,334.26
7500 - Contract/Consultant Services	\$0.00	\$16,070.50	\$16,070.50
8100 - Non personnel expenses	\$3,074.64	\$18,080.10	\$21,154.74
8200 - Facility & equipment expenses	\$0.00	\$119,068.59	\$119,068.59
8300 - Travel & meetings expenses	\$0.00	\$65,501.46	\$65,501.46
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	\$19,367.24	\$735,849.28	\$755,216.52
Net Ordinary Income	(\$19,367.24)	(\$510,876.12)	(\$530,243.36)
Other Income and Expenses			
Other Expense			
8500 - Other Expense	\$0.00	\$92,506.08	\$92,506.08
Total - Other Expense	\$0.00	\$92,506.08	\$92,506.08

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	\$39,318.68	(\$39,318.68)	0.00%
4500 - Federal Revenue	\$0.00	\$75,000.00	(\$75,000.00)	0.00%
5100 - Program Fee Revenue	\$0.00	\$155,499.02	(\$155,499.02)	0.00%
5300 - Interest and Dividends	\$0.00	\$11,221.32	(\$11,221.32)	0.00%
5400 - Revenue from other sources	\$0.00	\$429.90	(\$429.90)	0.00%
5800 - Special Event Expense	\$0.00	\$330.00	(\$330.00)	0.00%
Total - Income	\$0.00	\$282,762.92	(\$282,762.92)	0.00%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$982.19	(\$982.19)	0.00%
Total - Cost Of Sales	\$0.00	\$982.19	(\$982.19)	0.00%
Gross Profit	\$0.00	\$281,780.73	(\$281,780.73)	0.00%
Expense				
7200 - Salaries & related expenses	\$0.00	\$129,684.99	(\$129,684.99)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$26,823.11	(\$26,823.11)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$9,676.15	(\$9,676.15)	0.00%
8100 - Non personnel expenses	\$0.00	\$32,603.75	(\$32,603.75)	0.00%
8200 - Facility & equipment expenses	\$0.00	\$165,374.13	(\$165,374.13)	0.00%
8300 - Travel & meetings expenses	\$0.00	\$6,037.53	(\$6,037.53)	0.00%
8400 - Insurance Expense	\$0.00	\$86,964.27	(\$86,964.27)	0.00%
Total - Expense	\$0.00	\$457,163.93	(\$457,163.93)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$16,988.39	(\$16,988.39)	0.00%
Total - Other Expense	\$0.00	\$16,988.39	(\$16,988.39)	0.00%
Net Income	\$0.00	(\$192,371.59)	\$192,371.59	0.00%

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

Financial Row	60 Economic Development					
	Development /Lending					
		Amount	Amount	Clayton Lake Amount	State Parks Hugo Lake Raymond Gary Amount	Total Amount
Ordinary Income/Expense						
Income						
4000 - Contribution Revenue		\$0.00	\$0.00	\$9.00	\$0.00	\$9.00
4100 - Inkind Revenue		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4200 - Miscellaneous Revenue		\$0.00	\$0.00	\$0.00	\$955.00	\$955.00
4400 - State Revenue		\$0.00	\$0.00	\$19,010.00	\$0.00	\$39,318.68
4500 - Federal Revenue		\$75,000.00	\$0.00	\$0.00	\$0.00	\$0.00
4900 - Recoveries from Programs		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue		\$1,348.25	\$7,138.50	\$12,619.00	\$93,609.25	\$146,055.75
5300 - Interest and Dividends		\$8,997.20	\$0.00	\$0.00	\$1,013.40	\$1,211.55
5400 - Revenue from other sources		\$0.00	\$7.40	\$0.00	\$402.50	\$429.90
5800 - Special Event Expense		\$0.00	\$0.00	\$0.00	\$330.00	\$330.00
Total - Income		\$85,345.45	\$7,145.90	\$31,638.00	\$96,310.15	\$188,309.88
8000 - Cost of Goods Sold						
8020 - Ship Store (Resale Inv)		\$0.00	\$0.00	\$0.00	\$982.19	\$982.19
Total - 8000 - Cost of Goods Sold		\$0.00	\$0.00	\$0.00	\$982.19	\$982.19
Expense						
7000 - Grants, contracts, & direct assistance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses		\$0.00	\$0.00	\$18,759.74	\$70,908.87	\$117,000.89
7300 - Indirect Cost Pool Expense		\$0.00	\$0.00	\$3,843.12	\$14,788.37	\$24,232.17
7500 - Contract/Consultant Services		\$0.00	\$0.00	\$0.00	\$9,326.15	\$9,401.15
8100 - Non personnel expenses		\$812.33	\$0.00	\$1,236.57	\$28,710.63	\$31,497.20
8200 - Facility & equipment expenses		\$11,641.38	\$162.10	\$3,628.09	\$144,284.18	\$153,714.07
8300 - Travel & meetings expenses		\$0.00	\$0.00	\$53.75	\$4,023.67	\$5,988.50
8400 - Insurance Expense		\$0.00	\$0.00	\$5,823.03	\$73,627.21	\$86,964.27
8600 - Business expenses		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8800 - In-Kind Expenses		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense		\$12,453.71	\$162.10	\$33,344.30	\$345,669.08	\$428,798.25
Net Ordinary Income		\$72,891.74	\$6,983.80	(\$1,706.30)	(\$250,341.12)	\$3,593.06
Other Income and Expenses						
Other Expense						
8500 - Other Expense		\$0.00	\$0.00	\$783.41	\$12,117.55	\$16,985.89
Total - Other Expense		\$0.00	\$0.00	\$783.41	\$12,117.55	\$16,985.89

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Credit Card Vendor Totals
May 2024
Options: Show Zeros

NAME	AMOUNT (GROSS)
CAPITAL ONE	\$26,947.77
DAVISON FUELS & OIL, LLC	\$10,441.66
DOLLAR GENERAL CHARGE SALES	\$20.57
HOME DEPOT BRC/GECF	\$9,085.69
TCM BANK NA	\$42,225.56
WAL-MART COMMUNITY BRC	\$4,501.90
Total	\$93,223.15

LIFT Community Action Agency Inc
Credit Card Report
May 2024

Program	Cost of	Facility & equipment expenses				Food Expenses			Grants, contracts, & direct assistance			
	Goods Sold	Constructio	FURNITURE	Repair/Maint	Total	Food	Non -Food,	Other Food	Direct		Direct	
	Ship Store (Resale Inv)	n Rehab & Renovation	APPLIANCES & Building/Eq	for		Nutrition Cost	Nutrition Cost	Expense	Assistance Other	Assistance Utilities	Assistance Other	Assistance Utilities
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Administration				\$161.41	\$161.41		\$51.25	\$948.32	\$999.57			\$0.00
Apartments					\$0.00				\$0.00			\$0.00
CASA					\$0.00				\$0.00			\$0.00
Community Services					\$0.00				\$0.00			\$0.00
Early Head Start Child Care					\$0.00			\$14.22	\$14.22			\$0.00
Early Learning Centers					\$0.00	\$117.88	\$61.83	\$440.33	\$620.04			\$0.00
Head Start				\$865.99	\$865.99		\$228.80	\$584.37	\$813.17			\$0.00
Housing		\$96.00		\$68.19	\$164.19		\$34.21	\$228.26	\$262.47			\$0.00
Mentoring					\$0.00				\$0.00			\$0.00
State Park Operations	\$368.06		\$11,636.19	\$1,712.00	\$13,348.19				\$0.00			\$0.00
T&MA					\$0.00				\$0.00			\$0.00
TRANSIT					\$0.00				\$0.00			\$0.00
Tri-CORPS					\$0.00			\$128.36	\$128.36			\$0.00
VOCA					\$0.00				\$0.00	\$251.33	\$140.34	\$391.67
Youth Build					\$0.00			\$8.84	\$8.84			\$0.00
Total	\$368.06	\$96.00	\$11,636.19	\$2,807.59	\$14,539.78	\$117.88	\$376.09	\$2,352.70	\$2,846.67	\$251.33	\$140.34	\$391.67

Non personnel expenses										Other Expense				
Events/Meet ing Expense Amount	Office/Teachi ng Supplies Amount	Other/Maint Supplies Amount	Postage & shipping Amount	Printing & copying Amount	Special Events Amount	Telephone & Internet Amount	Advertising & Community Total Amount	Sponsorships Amount	Computer & Software Related Amount	Fees/Dues Amount	Incentive Expense Amount	Other Expenses Amount	Recognition Amount	Training & TTA Amount
\$55.81	\$1,705.78	\$5,398.42			\$0.11		\$7,160.12	\$9,851.08	\$567.52	\$2,027.20		\$279.64	\$135.24	\$348.00
							\$0.00							\$150.00
\$20.57							\$20.57			\$38.00				
					\$467.50		\$467.50							\$895.00
\$181.25	\$4,006.58						\$4,187.83	\$161.57						\$60.00
	\$1,273.37						\$1,273.37							
\$600.80	\$4,313.21				\$262.42		\$5,176.43	\$366.26	\$34.97	\$271.25		\$67.65	\$1,161.05	\$458.47
					\$116.51		\$116.51		\$719.64	\$578.73				\$3,169.80
							\$0.00				\$163.75			
		\$77.64	\$246.34			\$700.88	\$1,024.86			\$16.00				
							\$0.00		\$19.99	\$191.88				\$270.00
							\$0.00			\$42.32				
\$233.48				\$76.50			\$309.98	\$55.00		\$200.00				\$15.75
							\$0.00							
	\$9.15				\$8.25		\$17.40							\$568.88
\$1,091.91	\$11,308.09	\$5,476.06	\$246.34	\$76.50	\$854.79	\$700.88	\$19,754.57	\$10,433.91	\$1,342.12	\$3,365.38	\$163.75	\$347.29	\$1,296.29	\$5,935.90

Travel & meetings expenses				Total
Total Amount	Fuel Cost Amount	Out of Area Travel Amount	Total Amount	Amount
\$13,208.68		\$5,741.17	\$5,741.17	\$27,270.95
\$150.00	\$211.10		\$211.10	\$361.10
\$38.00			\$0.00	\$58.57
\$895.00			\$0.00	\$1,362.50
\$161.57	\$187.37	\$639.83	\$827.20	\$5,190.82
\$60.00			\$0.00	\$1,953.41
\$2,359.65	\$425.04	\$1,450.45	\$1,875.49	\$11,090.73
\$4,468.17	\$1,690.43		\$1,690.43	\$6,701.77
\$163.75		\$763.60	\$763.60	\$927.35
\$16.00	\$580.44		\$580.44	\$15,337.55
\$481.87		\$1,432.40	\$1,432.40	\$1,914.27
\$42.32	\$7,275.28		\$7,275.28	\$7,317.60
\$270.75			\$0.00	\$709.09
\$0.00			\$0.00	\$391.67
\$568.88	\$85.00	\$2,869.96	\$2,954.96	\$3,550.08
\$22,884.64	\$10,454.66	\$12,897.41	\$23,352.07	\$84,137.46

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Dec 2024
Options: Activity Only

HS 23.24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$684,597.00	\$315,875.95	\$368,721.05	46.14%
4200 - Miscellaneous Revenue	\$0.00	\$7,924.80	(\$7,924.80)	0.00%
4500 - Federal Revenue	\$3,510,751.00	\$1,820,062.00	\$1,690,689.00	51.84%
Total - Income	\$4,195,348.00	\$2,143,862.75	\$2,051,485.25	51.10%
Gross Profit	\$4,195,348.00	\$2,143,862.75	\$2,051,485.25	51.10%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$2,038,720.00	\$976,454.91	\$1,062,265.09	47.90%
7230 - Pension plan contributions	\$202,000.00	\$69,541.20	\$132,458.80	34.43%
7240 - Employee benefits - not pension	\$273,476.00	\$146,356.46	\$127,119.54	53.52%
7250 - Payroll taxes, etc.	\$215,533.00	\$79,469.06	\$136,063.94	36.87%
Total - 7200 - Salaries & related expenses	\$2,729,729.00	\$1,271,821.63	\$1,457,907.37	46.59%
7300 - Indirect Cost Pool Expense	\$536,183.00	\$257,656.35	\$278,526.65	48.05%
7500 - Contract/Consultant Services	\$46,700.00	\$19,400.92	\$27,299.08	41.54%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$13,250.00	\$65,269.51	(\$52,019.51)	492.60%
8120 - Other/Maint Supplies	\$0.00	\$12,332.83	(\$12,332.83)	0.00%
8130 - Telephone & Internet	\$0.00	\$25,594.26	(\$25,594.26)	0.00%
8140 - Postage & shipping	\$0.00	\$478.96	(\$478.96)	0.00%
8150 - Medical/Dental Supplies	\$0.00	\$15,536.23	(\$15,536.23)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$113.90	(\$113.90)	0.00%
8170 - Printing & copying	\$0.00	\$4,590.35	(\$4,590.35)	0.00%
8180 - Fatherhood	\$1,000.00	\$0.00	\$1,000.00	0.00%
Total - 8100 - Non personnel expenses	\$14,250.00	\$123,916.04	(\$109,666.04)	869.59%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$1,924.26	(\$1,924.26)	0.00%
8220 - Electric	\$35,000.00	\$18,668.64	\$16,331.36	53.34%
8225 - Water	\$0.00	\$2,264.59	(\$2,264.59)	0.00%
8230 - Trash	\$0.00	\$5,102.31	(\$5,102.31)	0.00%
8235 - Sewer	\$0.00	\$1,770.15	(\$1,770.15)	0.00%
8240 - Natural Gas	\$0.00	\$1,656.75	(\$1,656.75)	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	\$38,201.55	(\$23,993.55)	268.87%
Total - 8200 - Facility & equipment expenses	\$49,208.00	\$74,646.11	(\$25,438.11)	151.70%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$10,000.00	\$17,466.45	(\$7,466.45)	174.66%
8320 - Out of Area Travel	\$3,400.00	\$3,445.09	(\$45.09)	101.33%
8330 - Fuel Cost	\$0.00	\$2,202.34	(\$2,202.34)	0.00%
8335 - Vehicle Repair & Maint	\$7,000.00	\$574.83	\$6,425.17	8.21%
8340 - Child Transportation Exp	\$0.00	\$1,452.92	(\$1,452.92)	0.00%
Total - 8300 - Travel & meetings expenses	\$20,400.00	\$25,141.63	(\$4,741.63)	123.24%
8400 - Insurance Expense	\$23,500.00	\$76,352.55	(\$52,852.55)	324.90%
8700 - Food Expenses	\$46,800.00	\$74,571.93	(\$27,771.93)	159.34%
8800 - In-Kind Expenses	\$684,597.00	\$315,875.95	\$368,721.05	46.14%
Total - Expense	\$4,151,367.00	\$2,239,383.11	\$1,911,983.89	53.94%
Other Income and Expenses				
Other Expense				

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LIFT | Budget vs. Actual by Grant

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
8500 - Other Expense				
8520 - Recognition	\$0.00	\$305.51	(\$305.51)	0.00%
8530 - Fees/Dues	\$865.00	\$13,533.07	(\$12,668.07)	1,564.52%
8540 - Training & TTA	\$39,956.00	\$16,969.10	\$22,986.90	42.47%
8560 - Computer & Software Related Expenses	\$0.00	\$41,250.71	(\$41,250.71)	0.00%
8570 - Advertising & Community Sponsorships	\$2,160.00	\$5,797.35	(\$3,637.35)	268.40%
8590 - Other Expenses	\$1,000.00	\$832.45	\$167.55	83.25%
Total - 8500 - Other Expense	\$43,981.00	\$78,688.19	(\$34,707.19)	178.91%
Total - Other Expense	\$43,981.00	\$78,688.19	(\$34,707.19)	178.91%
Net Income	\$0.00	(\$174,208.55)	\$174,208.55	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

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$193,091.00	\$34,286.96	\$158,804.04	17.76%
4500 - Federal Revenue	\$999,189.00	\$461,452.00	\$537,737.00	46.18%
Total - Income	\$1,192,280.00	\$495,738.96	\$696,541.04	41.58%
Gross Profit	\$1,192,280.00	\$495,738.96	\$696,541.04	41.58%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$512,515.00	\$245,330.90	\$267,184.10	47.87%
7230 - Pension plan contributions	\$50,593.00	\$14,448.44	\$36,144.56	28.56%
7240 - Employee benefits - not pension	\$68,696.00	\$37,105.18	\$31,590.82	54.01%
7250 - Payroll taxes, etc.	\$53,984.00	\$20,110.02	\$33,873.98	37.25%
Total - 7200 - Salaries & related expenses	\$685,788.00	\$316,994.54	\$368,793.46	46.22%
7300 - Indirect Cost Pool Expense	\$134,791.00	\$58,833.37	\$75,957.63	43.65%
7500 - Contract/Consultant Services	\$2,500.00	\$2,935.14	(\$435.14)	117.41%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$34,340.00	\$22,350.85	\$11,989.15	65.09%
8120 - Other/Maint Supplies	\$0.00	\$2,309.53	(\$2,309.53)	0.00%
8130 - Telephone & Internet	\$0.00	\$3,190.72	(\$3,190.72)	0.00%
8140 - Postage & shipping	\$0.00	\$102.68	(\$102.68)	0.00%
8150 - Medical/Dental Supplies	\$0.00	\$3,193.20	(\$3,193.20)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$543.74	(\$543.74)	0.00%
8170 - Printing & copying	\$0.00	\$976.92	(\$976.92)	0.00%
8180 - Fatherhood	\$2,500.00	\$0.00	\$2,500.00	0.00%
Total - 8100 - Non personnel expenses	\$36,840.00	\$32,667.64	\$4,172.36	88.67%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$100.48	(\$100.48)	0.00%
8220 - Electric	\$25,500.00	\$4,660.61	\$20,839.39	18.28%
8225 - Water	\$0.00	\$805.46	(\$805.46)	0.00%
8230 - Trash	\$0.00	\$1,003.39	(\$1,003.39)	0.00%
8235 - Sewer	\$0.00	\$454.94	(\$454.94)	0.00%
8240 - Natural Gas	\$0.00	\$782.00	(\$782.00)	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	\$6,133.09	\$20,866.91	22.72%
Total - 8200 - Facility & equipment expenses	\$52,500.00	\$15,024.30	\$37,475.70	28.62%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$5,000.00	\$1,601.69	\$3,398.31	32.03%
8320 - Out of Area Travel	\$34,000.00	\$477.75	\$33,522.25	1.41%
8330 - Fuel Cost	\$0.00	\$413.24	(\$413.24)	0.00%
8335 - Vehicle Repair & Maint	\$0.00	\$123.23	(\$123.23)	0.00%
Total - 8300 - Travel & meetings expenses	\$39,000.00	\$2,615.91	\$36,384.09	6.71%
8400 - Insurance Expense	\$13,500.00	\$21,381.26	(\$7,881.26)	158.38%
8700 - Food Expenses				
8710 - Food Nutrition Cost	\$22,070.00	\$22,418.44	(\$348.44)	101.58%
8720 - Non -Food, Nutrition Cost	\$0.00	\$109.80	(\$109.80)	0.00%
8730 - Other Food Expense	\$0.00	\$2,305.23	(\$2,305.23)	0.00%
Total - 8700 - Food Expenses	\$22,070.00	\$24,833.47	(\$2,763.47)	112.52%
8800 - In-Kind Expenses	\$0.00	\$34,286.96	(\$34,286.96)	0.00%
Total - Expense	\$986,989.00	\$509,572.59	\$477,416.41	51.63%

Page 31 of 33

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8530 - Fees/Dues	\$0.00	\$3,577.08	(\$3,577.08)	0.00%
8540 - Training & TTA	\$19,304.00	\$8,876.84	\$10,427.16	45.98%
8560 - Computer & Software Related Expenses	\$0.00	\$7,609.62	(\$7,609.62)	0.00%
8570 - Advertising & Community Sponsorships	\$2,000.00	\$1,238.99	\$761.01	61.95%
8590 - Other Expenses	\$21,496.00	\$0.00	\$21,496.00	0.00%
Total - 8500 - Other Expense	\$42,800.00	\$21,302.53	\$21,497.47	49.77%
Total - Other Expense	\$42,800.00	\$21,302.53	\$21,497.47	49.77%
Net Income	\$162,491.00	(\$35,136.16)	\$197,627.16	-21.62%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Dec 2024
Options: Activity Only

EHSCC 23-24

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$0.00	\$3,691.69	(\$3,691.69)	0.00%
4500 - Federal Revenue	\$2,216,745.00	\$1,641,831.00	\$574,914.00	74.06%
Total - Income	\$2,216,745.00	\$1,645,522.69	\$571,222.31	74.23%
Gross Profit	\$2,216,745.00	\$1,645,522.69	\$571,222.31	74.23%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$471,363.00	\$355,854.75	\$115,508.25	75.49%
7230 - Pension plan contributions	\$37,710.00	\$30,184.33	\$7,525.67	80.04%
7240 - Employee benefits - not pension	\$60,782.00	\$55,634.69	\$5,147.31	91.53%
7250 - Payroll taxes, etc.	\$40,302.00	\$28,228.83	\$12,073.17	70.04%
Total - 7200 - Salaries & related expenses	\$610,157.00	\$469,902.60	\$140,254.40	77.01%
7300 - Indirect Cost Pool Expense	\$123,968.00	\$93,846.71	\$30,121.29	75.70%
7500 - Contract/Consultant Services				
7540 - Professional Services	\$3,500.00	\$0.00	\$3,500.00	0.00%
7550 - Contract Services	\$45,340.00	\$4,352.67	\$40,987.33	9.60%
7560 - Partner Contracts	\$967,235.00	\$731,730.04	\$235,504.96	75.65%
Total - 7500 - Contract/Consultant Services	\$1,016,075.00	\$736,082.71	\$279,992.29	72.44%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$64,000.00	\$112,943.86	(\$48,943.86)	176.47%
8120 - Other/Maint Supplies	\$5,000.00	\$6,096.11	(\$1,096.11)	121.92%
8130 - Telephone & Internet	\$14,400.00	\$3,469.88	\$10,930.12	24.10%
8140 - Postage & shipping	\$0.00	\$326.23	(\$326.23)	0.00%
8150 - Medical/Dental Supplies	\$1,000.00	\$8,395.44	(\$7,395.44)	839.54%
8160 - Events/Meeting Expense	\$0.00	\$205.27	(\$205.27)	0.00%
8170 - Printing & copying	\$15,000.00	\$4,196.37	\$10,803.63	27.98%
8180 - Fatherhood	\$2,000.00	\$0.00	\$2,000.00	0.00%
Total - 8100 - Non personnel expenses	\$101,400.00	\$135,633.16	(\$34,233.16)	133.76%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$510.22	(\$510.22)	0.00%
8220 - Electric	\$720.00	\$5,645.03	(\$4,925.03)	784.03%
8225 - Water	\$500.00	\$174.47	\$325.53	34.89%
8230 - Trash	\$300.00	\$677.68	(\$377.68)	225.89%
8235 - Sewer	\$300.00	\$83.39	\$216.61	27.80%
8240 - Natural Gas	\$500.00	\$479.24	\$20.76	95.85%
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	\$6,180.72	\$41,069.28	13.08%
Total - 8200 - Facility & equipment expenses	\$171,692.00	\$16,460.26	\$155,231.74	9.59%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$7,500.00	\$5,971.36	\$1,528.64	79.62%
8320 - Out of Area Travel	\$5,250.00	\$4,471.94	\$778.06	85.18%
8330 - Fuel Cost	\$5,000.00	\$1,858.09	\$3,141.91	37.16%
8335 - Vehicle Repair & Maint	\$0.00	\$428.75	(\$428.75)	0.00%
Total - 8300 - Travel & meetings expenses	\$17,750.00	\$12,730.14	\$5,019.86	71.72%
8400 - Insurance Expense	\$6,300.00	\$24,108.31	(\$17,808.31)	382.67%
8700 - Food Expenses				
8730 - Other Food Expense	\$3,000.00	\$156.00	\$2,844.00	5.20%
Total - 8700 - Food Expenses	\$3,000.00	\$156.00	\$2,844.00	5.20%

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LIFT | Budget vs. Actual by Grant

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
8800 - In-Kind Expenses	\$0.00	\$3,691.69	(\$3,691.69)	0.00%
Total - Expense	\$2,050,342.00	\$1,492,611.58	\$557,730.42	72.80%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$25,000.00	\$9,093.00	\$15,907.00	36.37%
8530 - Fees/Dues	\$1,500.00	\$5,997.59	(\$4,497.59)	399.84%
8540 - Training & TTA	\$42,863.00	\$20,672.47	\$22,190.53	48.23%
8560 - Computer & Software Related Expenses	\$0.00	\$17,932.09	(\$17,932.09)	0.00%
8570 - Advertising & Community Sponsorships	\$7,500.00	\$5,981.30	\$1,518.70	79.75%
8590 - Other Expenses	\$2,000.00	\$56.33	\$1,943.67	2.82%
8595 - Subsidy Expense	\$89,540.00	\$161,678.80	(\$72,138.80)	180.57%
Total - 8500 - Other Expense	\$168,403.00	\$221,411.58	(\$53,008.58)	131.48%
Total - Other Expense	\$168,403.00	\$221,411.58	(\$53,008.58)	131.48%
Net Income	(\$2,000.00)	(\$68,500.47)	\$66,500.47	3,425.02%



March 8, 2024

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

RE: CSBG Discretionary Funds for VITA Subsidies

The Oklahoma Association of Community Action Agencies, in conjunction with the Oklahoma Department of Commerce, is making available funding to assist your Volunteer Income Tax Assistance (VITA) program. Included is a copy of the contract for your review and signature.

The contract period is January 1, 2024, through August 31, 2024. Funding for your project is \$5,367.00. Funding is based on the number of returns you completed during last year's tax season.

Also included is the 2024 VITA Budget Form and the Request for Contract Reimbursement Form.

Please sign and return one copy of the contract and the Budget Form by Friday, March 29, 2024.
Forms may be returned via email to programs@okacaa.org.

If you will not need the full amount of funds allotted, please let me know so that we can allocate any available funds to other CAAs operating VITA sites.

If you have any questions, please feel free to contact me.

Sincerely,

A handwritten signature in black ink that reads "Amanda Ewing".

Amanda Ewing
Executive Director
Oklahoma Association of Community Action Agencies

Enclosures



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

May 30, 2024

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

Dear Ms. Porter:

The fourth 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
4th Allocation	\$115,169.00
	\$234,423.00

Please proceed to OKGrants <https://grants.ok.gov> to request a revision.

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". The signature is written in a cursive, flowing style.

Marshall Vogts, Director
Community Development

Funding Opportunity: FY24 Supplemental Grant Application
Funding Entity: NeighborWorks® America
Amount Requested: \$25,000

LIFT Community Action Agency, Inc. is requesting the Board's approval to submit an application to NeighborWorks® America for the FY24 Supplemental Grant Application for their opportunity to conduct Capital Needs Assessments at nine LIFT Apartment locations. LIFT Apartments have not been able to conduct a Capital Needs Assessment since 2013 due to increased insurance premiums, resulting in properties not cash flowing.

	# of Units	Address	Date of Last CNA
Belmont Place	20	311 S 14 th Street Hugo, OK 74743	N/A
Clayton Place	10	1301 Pine Street Clayton, OK 74536	N/A
Boswell	3	320 Hunter Ave Boswell, OK 74727	2013
Ft. Towson	3	606 W Boston Ave Ft Towson, OK 74735	2013
Garvin	3	211 W Williams Garvin, OK 74736	2013
Terry Hill	60	410 N L Street Hugo, OK 74743	2013
Kiamichi Place	16	1307 SE 3 rd Street Antlers, OK 74523	N/A
Chappell	3	112 N Chappell Drive Valliant, OK 74736	2013
Soper	3	104 Hayes St Soper, OK 74759	N/A

Funding Entity: Oklahoma Office of Attorney General
Funding Opportunity: FY 2025 Domestic Violence/Sexual Assault
Program Application
Amount Requested: \$93,750
Agency Program: LIFT Victim Services Programs

LIFT CAA is certified as a Domestic Violence, Sexual Assault, Stalking Victim Services Program through the Oklahoma Office of the Attorney General. The agency was granted temporary certification status in September 2019, and received full certification (for a three-year period) in 2021. The agency's Victim and Youth Services programming arm of operations, which often work in collaboration to extend and complement services provided, is comprised of the following (listed in order of inception year):

- Court Appointed Special Advocates Program, 1997
- Passport to the Future Mentoring Program, 2003
- Victim Advocacy Services, 2015
- Safe Place Healing Hearts, 2017
- Safe Place Healing Hearts Too, 2021.

With the Board's approval, we are requesting to submit an FY 2025 Domestic Violence/Sexual Assault Program Application to the Oklahoma Office of the Attorney General. This funding is supported through State Appropriations, Court Fees, and Federal Family Violence Prevention and Services Act Funds. If awarded funding by the State, LIFT CAA will be required to meet the matching requirements (not less than \$1 for every \$5 of Federal funds provided to the agency under the program funding).

The proposed one-year grant would be used to provide supportive services to adult victims of domestic violence and/or sexual assault, as well as children exposed to family violence, domestic violence or dating violence. Supportive services would include crisis intervention, safety planning, individual counseling, peer counseling, educational services, legal advocacy, personal advocacy, housing advocacy, medical advocacy, information/referral, and transportation. The grant funding would also be used for the provision of dating violence intervention and prevention, culturally and linguistically appropriate services, and outreach to underserved populations.

The grant application is due June 28, 2024.

Funding Entity: Oklahoma Court Appointed Special Advocates
(CASA) Association
Funding Opportunity: FY 2025 Base Grant Application
Amount Requested: \$27,459.10
Agency Program: LIFT CASA Program

The Oklahoma CASA Association has made available Base Grant funds for member Oklahoma CASA programs in good standing. Eligible programs must have 15 active cases; “active” means that a volunteer must be court-appointed and working that case.

The LIFT CASA Program has been serving abused and/or neglected children since 1997. The program began with a small budget in Pushmataha County but expanded later to include Choctaw and McCurtain Counties as well. LIFT CASA recruits volunteers to be the voice of children in situations of abuse or neglect who have been made wards of the court. Our CASA volunteers make sure the best interests of each child are considered. These trained volunteers are assigned cases by a court judge, and they gather information about their cases in order to present informed recommendations to the court. The goal of LIFT CASA is to continue to expand the program and recruit more volunteers so that every abused or neglected child in the District Court system will be represented by a CASA worker.

With the Board’s approval, we are requesting up to \$27,459.10 from the Oklahoma CASA Association for Base Grant funding. If awarded, the proposed one-year grant would be used to provide staff salary support as well as associated program operating expenses.

The grant application is due July 12, 2024.

CONTRACT FOR SERVICES

Contract # 2024 OADP/ODOC LIFT Community Action Agency

**Source of Funds: Federal Community Services Block Grant
CFDA # 93.569**

This contract is made and entered into effective January 1, 2024 through August 31, 2024, by and between the Oklahoma Association of Community Action Agencies, an Oklahoma not-for-profit corporation, and its related, affiliated, and subsidiary entities (hereinafter collectively referred to as "OKACAA") and LIFT Community Action Agency, a not-for-profit corporation, (hereinafter referred to as Contractor).

I. PURPOSE

Funds provided by this contract are from the Oklahoma Department of Commerce, originating from the U.S. Department of Health and Human Services. Funds are for use to assist with free tax preparation assistance.

II. SERVICE

OKACAA hereby agrees to provide funding to Contractor for costs associated with the free tax preparation assistance up to the amount specified below.

Contractor shall provide the necessary staff, office space and other resources to provide the free tax preparation assistance within their designated service area(s). Contractor recognizes this contract may not cover all costs associated with provision of the service and will be responsible for any and all costs in excess of the final contract amount.

Contract funds will be utilized only to provide services to individuals and families eligible for services under the CSBG income guidelines.

Contractor shall comply with the requirements of the Community Action Agency Contractor Implementation Manual issued by the Oklahoma Department of Commerce.

III. PERFORMANCE

As mandated by the funding source, funding has been based upon prior year performance for continuing contractors. Failure to equal prior year performance of 117 returns may result in a decrease in funding in future years, if funding is available. Funding may be increased or decreased based on performance relative to other participating contractors.

IV. COMPENSATION

OKACAA shall provide an allocation of \$5,367.00 to subsidize a portion of Contractor's costs for the provision of free tax preparation assistance. Costs chargeable to this contract include staff time, travel, supplies, equipment, and other direct and indirect costs specifically allocable to the project. All costs will be in accordance with federal cost principles.

V. FUNDS AVAILABILITY

Contractor may request reimbursement of expenses according to the dates listed below:

- Expenses incurred between January 1 and February 29 must be submitted by March 29
- March expenses submitted by May 15
- April expenses submitted by June 14
- May expenses submitted by July 15
- June expenses submitted by August 15
- July expenses submitted by September 16
- August expenses submitted by September 16

You are welcome to submit your expense reports earlier than the deadlines listed above. All funds must be requested no later than September 30, 2024.

VI. REPORTS, DOCUMENTATION

Contractor shall submit a budget to OKACAA by March 29, 2024. Contractor shall amend the budget as required to reflect any changes in activities to be performed under this contract.

Contractor shall submit an expenditure report in such form as required by OKACAA in order to receive reimbursement of expenditures. Actual reimbursement amount will be in accordance with Section III above. Upon request by OKACAA, Contractor shall submit documentation for any expenditures reported on the monthly Request for Contract Reimbursement. Contractor acknowledges that the Oklahoma Department of Commerce requires OKACAA to review said documentation on their behalf.

Contractor shall maintain documentation of all expenditures onsite in the event the federal funding source (U.S. Department of Health and Human Services) or the Oklahoma Department of Commerce wishes to review said documentation.

VII. TRAINING and TECHNICAL ASSISTANCE

Contractor shall contact the Internal Revenue Service VITA liaison for training and technical assistance specific to actual tax preparation activities.

VIII. HOLD HARMLESS CLAUSE

Contractor, as an independent contractor with OKACAA, shall save harmless the OKACAA, the State of Oklahoma, its agents, officers, and employees from all claims and actions and all expenses defending same that are brought as a result of any injury or damages sustained by any person or property in consequence of any act or omission. Contractor shall save harmless the OKACAA, the State of Oklahoma, its agents, officers, and employees from any claim or amount recovered as a result of infringement of patent, trademark, or copyright or from any claim or amount arising or recovered under Workers' Compensation Law or any other law.

IX. MODIFICATION

All modifications shall be in writing and shall be agreed upon by both parties.

X. TERMINATION

This contract may be terminated upon twenty-four hours written notice, by OKACAA or Contractor, without any requirement or cause.

XI. AGREEMENT

This contract constitutes the entire agreement and understanding between the parties hereto. Your signature will acknowledge acceptance of this agreement on the terms stated herein and confirmation of the understanding between parties, and this document shall constitute a binding contract between parties.

Any notices required under this contract shall be set forth in writing and delivered by hand, fax, or registered mail to the addresses provided below.

IN WITNESS WHEREOF, the parties hereto have executed this contract:

Amanda Ewing

Date 3-8-2024

Amanda Ewing, Executive Director
Oklahoma Association of Community Action Agencies
605 Centennial Blvd, Edmond, OK 73013 Phone: 405-949-1495

Rebecca Porter

Date 3/26/2024

Rebecca Porter, Executive Director
LIFT Community Action Agency
209 N. 4th
Hugo, OK 74743
Phone: (580) 372-2582
Federal Employer Identification #: 73-0772321

Staff contact overseeing the VITA Program at your Agency:

Name: Macy Self

Phone: (580) 326-3351

Email: macy.self@liftca.org

Staff contact responsible for submitting VITA requests for contract reimbursement:

Name: Cindy Mills

Phone: (580) 326-3351

Email: Cindy.mills@liftca.org

2024 VITA Budget Form

Community Action Agency: LIFT Community Action Agency, Inc.

Contact Person: Macy Self

Email: macy.self@liftca.org Phone: (580) 326-3351

Cost Category	Budgeted Funds
Salaries and Wages	\$ 3,000.00
Fringe Benefits	\$ 1,023.30
Contractual	\$ -
Travel	\$ 554.70
Consumable Supplies	\$ -
Other Direct Costs	\$ -
Indirect Costs	\$ 789.00
Total	\$ 5,367.00



May 8, 2024

Rebecca Reynolds
Executive Director
LIFT Community Action Agency, Inc.
209 North 4th
Hugo, OK 74743

RE: FY2024 ROUND 1 NONBINDING GRANT AWARD LETTER

Dear Rebecca,

LIFT Community Action Agency, Inc. has been recommended to receive \$262,000 of grant funds from the Neighborhood Reinvestment Corporation, dba NeighborWorks America. These grant funds are federal funds made available by the Consolidated Appropriations Act of 2024 (H.R. 2471 / Public Law 118 -42). **This letter is an initial, non-binding notice of the intent to award these grant funds; the award and disbursement of grant funds is subject to the conditions outlined below.** NeighborWorks America expects to disburse these grant funds in late May.

Unrestricted*	\$	262,000
Restricted Until First Use*	\$	0
TOTAL	\$	262,000

The **Unrestricted** funds include the following awards:

FY2024 Round 1 Expendable	\$	187,000
FY2024 Round 1 Capital (<i>for organizations rated Exemplary</i>)	\$	75,000

The **Restricted Until First Use** funds include the following award:

FY2024 Round 1 Capital (<i>For organizations rated Strong, Good, Satisfactory, Serious, or Vulnerable</i>)	\$	0
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*Please see definitions at the end of this letter.

The FY2024 Round 1 Expendable award is provided to support your organization's overall mission, while Round 1 Capital awards focus on support for real estate development and lending activities.

Details of all the grant formula elements and the impact of each element on your total award can be found in the attached 'FY2024 NEC grant details - LIFT Community Action Agency, Inc. file.

In response to the significant decrease in its FY2024 appropriation from Congress, NeighborWorks America modified the formula for Round 1 grant awards. We did not modify the formula for Expendable grant funds. We did modify the formula for capital grant funds as follows:

- "Bin 4" was adjusted from \$185,000 to \$170,000
- "Bin 5" was adjusted from \$275,000 to \$245,000
- "Bin 6" was adjusted from \$360,000 to \$315,000

These changes were made to the initial FY2024 Round I Expendable and Capital grant formulas, which can be found

in the Round 1 Expendable and Capital Grant instructions on the Member Site.

Please note that this is a non-binding announcement of these grant award recommendations which will become binding when the following conditions are met, at which point funds will be disbursed:

- NeighborWorks America's receipt of funds from the U.S. Department of Treasury.
- Organization meets NeighborWorks America's compliance requirements for receiving grants, including but not limited to maintaining organizational health standards, timely submission of audit package, reporting, and compliance with the network charter agreement.
- Organization must maintain the requisite organizational health standards. Organizations with a Vulnerable health rating and/or Provisional Charter status are ineligible to receive grants unless NeighborWorks America determines that sufficient progress has been made against the items noted in the organization's health assessment and allows an exception.
- NeighborWorks America must issue an Investment and Grant Funds Letter in its Grants Portal setting forth the terms and conditions of this award. Acceptance of the grant funds by Organization pursuant to the Investment and Grant Funds Letter constitutes a binding obligation for both parties.

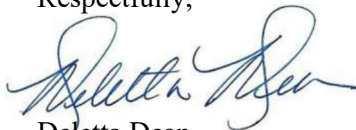
The specific terms, allowable purposes and grant award amounts will be stated in the *Investment and Grant Funds Letter* which will be uploaded into Grants Portal prior to disbursement. Therefore, you are instructed not to recognize these grant funds on your organization's financial statements until they have been received.

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.

Your organization's Relationship Manager is available to answer any questions you might have about these or other resources available through NeighborWorks America.

Thank you for applying to this grant round, for your continued contributions to the NeighborWorks Network, and for the great work being done by LIFT Community Action Agency, Inc..

Respectfully,



Deletta Dean

Vice President, Midwest Region

cc: William Smith, Board President
Kathryn Watts, Senior Vice President Field Operations Division
Leon Gray, Relationship Manager

DEFINITIONS

“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.

“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).

“Investment Grant Agreement (IGA)” defines the terms under which an organization may apply for, receive, and account for any funds received through the Corporation. The IGA includes organizational requirements for a grant application to be made, compliance requirements, eligible uses of funds, reporting requirements, monitoring requirements, and audit requirements. Investment and Grant Fund Letters subordinate to the IGA are issued to the network organization for subsequent grant awards (excluding special outside funded grants for programs available to both network and non-network organizations).

“Investment and Grant Funds Letter” provided by NeighborWorks America to the NeighborWorks Organization detailing the award size, the type of grant funds, and terms and conditions that apply to those funds (in addition to those set forth in this Investment and Grant Agreement.)

Source: *Investment and Grant Agreement*, 2017

NeighborWorks America
1255 Union Street, NE
Suite 500
Washington, DC 20002
202-760-4000

BANK OF AMERICA

TAC (TM) D 23853675-423325-50000000
12-3456
7890
Items 12 & 13
Page 4 of 4
46180

DATE 05/29/2024

\$ ****262,000.00

PAY Two Hundred Sixty-Two Thousand Dollars and 00/100 Cents

NOT VALID AFTER 180 DAYS

TO
THE
ORDER
OF

Little Dixie Community Action Agency
209 North 4th Street
Hugo OK 74743
United States

VOID
Kendra M Esmond

** ACH PAYMENT **

NeighborWorks America
LIFT Community Action Agency, Inc. Little Dixie Community Action Agency
46180
05/29/2024

Date	Invoice	Memo	Orig. Amt	Amt. Due	Amount
5/23/2024	Bill 50777	Round 1 Network Expendable and	75,000.00	75,000.00	75,000.00
5/23/2024	Bill 50776	Round 1 Network Expendable and	187,000.00	187,000.00	187,000.00
Round 1 Network Expendable and Capital Grant Request FY24					262,000.00


KAPLAN

Early Learning Company
PO Box 609
Lewisville, NC 27023-0609

Customer # 91568217
Handling Code: 6034 PR - 6134

800-334-2014 Toll Free

336-293-1153 Fax

www.kaplanco.com

WEEK OF THE YOUNG CHILD 2024

SHIP TO (Please Print) (Daycare Physical Address)

Choctaw Nation of Oklahoma

Child Care Assistance Office

PO Box 1210

Durant, OK 74702-1210

580-920-4959 Fax

580-642-8150

Broken Bow Early Learning Center
1008 N. Park Dr.
Broken Bow, OK 74728

QTY	ITEM #	COLOR	ITEM DESCRIPTION	UNIT Price	TOTAL Price
1	31722		Toddler 4-Station Space Saver Easel	332.95	332.95
4	84983		Spill proof paint cups Set of 4	17.95	71.80 71.80
1	32423		Table top paint brush stand	29.95	29.95
1	84712		Easy grip chubby paint brushes set of 30	34.95	34.95

Facility: Lift CAA - Broken Bow Early Learning Center

Attention: Leota Southard

Physical Address: 1008 N. Park dr.

City: Broken Bow State: OK Zip: 74728

Phone Number: 580-584-9801

Total (This Side) 4109.65

Total (Other Side) _____

Total Order 4109.65

Discounts (if any) _____

Shipping (if any) _____


KAPLAN

Early Learning Company
PO Box 609
Lewisville, NC 27023-0609

Customer # 91568217
Handling Code: 6034 PR - 6134

800-334-2014 Toll Free

336-293-1153 Fax

www.kaplanco.com

WEEK OF THE YOUNG CHILD 2024

SHIP TO (Please Print) (Daycare Physical Address)
Choctaw Nation of Oklahoma

Child Care Assistance Office

PO Box 1210

Durant, OK 74702-1210

580-920-4959 Fax

580-642-8150

Idabel Early Learning Center
1203 SW Quincy St.
Idabel, OK 74745

QTY	ITEM #	COLOR	ITEM DESCRIPTION	UNIT Price	TOTAL Price
1	31722		Toddler 4-Station Space Saver Easel	332.95	332.95
4	84983		✓ Spill proof paint cups - set of 4	17.95	71.80
1	32423		✓ Table top Paintbrush Stand	29.95	29.95
1	84712		✓ Easy grip chubby paint brushes set of 30	34.95	34.95

Facility: Lif+CAA - Idabel Early Learning Center

Attention: Melinda Robinson

Physical Address: 1203 SW Quincy St

City: Idabel State: OK Zip: 74745

Phone Number: _____

Total (This Side) 469.65

Total (Other Side) _____

Total Order 469.65

Discounts (if any) _____

Shipping (if any) _____



POTTS FAMILY FOUNDATION, INC.

GRANT AWARD NOTIFICATION

ALN #21.027

Award Number: ARPA – PFF006

1	RECIPIENT NAME: Lift Community Action Agency, Inc. 209 N 4 th St. Hugo, OK 74743 UEI: XL9DVU1YDGU2	2	AWARD INFORMATION FUNDING SOURCE: American Rescue Plan Act (ARPA) For all contact with Potts Family Foundation pertaining to ARPA, please email: ARPA@pottsfamilyfoundation.org
3	PROJECT STAFF: PROJECT MGR: Ashley Gaddy EMAIL: ashley.gaddy@liftca.org FISCAL CONTACT: Sherre Ensley EMAIL: sherre.ensley@liftca.org	4	POTTS CONTACTS: PROJECT DIR: Linda Manaugh EMAIL: lmanaugh@pottsfamilyfoundation.org FISCAL CONTACT: See above EMAIL: UEI: HJC2CAKBSCZ5

5	OTHER KEY PERSONNEL: Darla Galyon, Kathy James, Becky Porter
6	PROJECT NAME: LIFT Community Action Agency Family Resource Center
7	PROJECT DESCRIPTION: LIFT Community Action Agency's Family Resource Center will serve as a centralized hub for families to access information/referrals, services, resources, and supports. The FRC will promote cross-sector collaboration, serving to strengthen systems across rural southeastern Oklahoma to mitigate the impact of adversity and support protective factors among families with children under age five. The FRC will serve Choctaw, McCurtain, and Pushmataha Counties, located centrally within the service area (Hugo, OK). Staff will provide direct assistance, conduct consultations/screenings, and facilitate or conduct education/training/skill-building sessions with parents and families (individually or group-based, in collaboration with partners as available). Crucial to the success of the FRC will be the establishment and ongoing engagement of a Parent Advisory Committee to inform and meaningfully support the center's efforts. Key partners in this effort will include the Choctaw County Coalition, Pushmataha County Turning Point Coalition, and McCurtain County Coalition for Change. These broad, multi-sectoral consortia boast a membership range of entities and professionals with expertise across the various community systems that will further support the FRC.
8	PROJECT TIMELINE: Start Date: 5/1/24 Estimated Completion Date: 10/31/26 FEDERAL FUNDING PERIOD: 3/3/2021 – 12/31/2026
9	GRANT AWARD AMOUNT: \$263,497

*Please see page two – to be completed, signed and returned

Supplementary Award Information

Subrecipient name: Lift Community Action Agency, Inc.

Subrecipient unique identifier: XL9DVU1YDGU2

Federal Award Identification Number (FAIN): SLFRP4646 **ALN #**21.027

Federal award date: March 3, 2021

Subaward period of performance (start and end date): May 1, 2024, and ends on October 31, 2026.

Total amount of the federal award committed to the subrecipient: \$ 263,497

Federal award project description, as required to be responsive to the Federal Funding Accountability and Transparency Act (FFATA):

The American Rescue Plan Act (ARPA) provides funding to States and other non-Federal entities to help in the efforts to relieve the public health emergency and negative economic impact of the Novel Coronavirus Disease 2019 (COVID-19) as described in the American Rescue Plan Act of 2021, P.L. 117-2, March 11, 2021, as amended, as well as the US Department of Treasury Final Rule, Coronavirus State and Local Fiscal Recovery Funds, 87 Fed. Reg. 4338, January 27, 2022 and all other applicable federal rules, policies, guidance, procedures, and directives including Reporting and Compliance Guidance, as may be amended.

Name of Federal awarding agency: U.S. Department of Treasury

Name of pass-through entity: Potts Family Foundation

Contact information for awarding official of the pass-through entity: See page 1 of agreement

Assistance Listings number and Title: 21.027, CFDA 93.498, American Rescue Plan Act

Identification of whether the award is R&D: N/A

Indirect cost rate for the Federal award: If the prime or subrecipient has a negotiated indirect cost rate for federal awards, the federally approved rate should be used. If not, the de minimis rate of 10% may be used.

Other requirements of the recipient (sub or prime):

All Subrecipients must adhere to the Uniform Guidance, 2 CFR Part 200.

Single audit requirement: Any prime or subrecipient that expends a total of \$750,000 or more in federal funds from any source must undergo a Single Audit.

The subrecipient must permit the pass-through entity and auditors to have access to the subrecipient's records and financial statements as necessary for the pass-through entity to meet federal and state requirements.

The agency to which the project is delegated or any subrecipient must complete the closeout process required by the State of Oklahoma.

Assurances and Certifications

Based on the information provided by the subrecipient's application, in accordance with 2 CFR 200.331(a) the subrecipient has been determined to be eligible to receive the above-described Federal assistance. The subrecipient acknowledges that subrecipient's performance is measured based on whether objectives of the Federal program were met and that as the subrecipient, it bears responsibility for programmatic decision making. The subrecipient is further responsible for adherence to the applicable Federal program requirements specified in the Federal award, and in accordance with its agreement uses the Federal funds to carry out a program for a public purpose specified by authorizing statute, as opposed to providing goods and services for the OHS.

The subrecipient acknowledges and agrees that the Potts Family Foundation and auditors to have access to the subrecipient's records and financial statements as necessary to meet the requirements of this part. Subrecipient further acknowledges that it has reviewed and agreed to the appropriate terms and conditions concerning the closeout of the award.

By signing below, recipient of grant agrees to all terms and conditions of the Grant Award Notification

Sub-Recipient:



Linda S.

Manaugh

Digitally signed by Linda S.
Manaugh
Date: 2024.05.21 09:34:05
+05'00'

Potts Family Foundation:

Title:

Executive Director

Date:

05/16/2024

Title:

Chief Programs Officer

Date:

5/20/24

Project Name: LIFT Community Action Agency Family Resource Center		
Personnel/Salaries		
Personnel/Salaries Sub-Total	\$ 110,694.00	3 Year Total
Fringe Benefits		
Fringe Benefits Sub-Total	\$ 37,757.00	3 Year Total
Travel/Training		
Travel/Training Sub-Total	\$ 25,804.00	3 Year Total
Supplies		
Supplies Sub-Total	\$ 14,395.00	3 Year Total
Contractual/Consulting		
Contractual/Consulting Sub-Total	\$ -	3 Year Total
Sub-Grant Awards		
Sub-Grant Awards Sub-Total	\$ -	3 Year Total
Other		
Other Sub-Total	\$ 45,735.00	3 Year Total
Indirect Costs		
Indirect Costs Sub-Total	\$ 29,112.00	3 Year Total
Total Family Resource Center ARPA Budget Request		
	\$ 263,497.00	

Form **990**

OMB No. 1545-0047

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

2023

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2023 calendar year, or tax year beginning , 2023 , and ending , 20																																			
B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%; vertical-align: top;"> C LIFT Community Action Agency Inc 209 N. 4th St. Hugo, OK 74743 </td> <td style="width:40%; vertical-align: top;"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>D Employer identification number</td> <td>73-0772321</td> </tr> <tr> <td>E Telephone number</td> <td>580-326-3351</td> </tr> <tr> <td>G Gross receipts \$</td> <td>27,894,957.</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> F Name and address of principal officer: Same As C Above </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>J Tax-exempt status:</td> <td>☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527</td> </tr> <tr> <td>K Website:</td> <td>www.liftca.org</td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>H(a) Is this a group return for subordinates?</td> <td>☐ Yes ☒ No</td> </tr> <tr> <td>H(b) Are all subordinates included?</td> <td>☐ Yes ☐ No</td> </tr> <tr> <td colspan="2">If "No," attach a list. See instructions.</td> </tr> <tr> <td>H(c) Group exemption number</td> <td></td> </tr> </table> </td> </tr> <tr> <td colspan="2"> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>L Form of organization:</td> <td>☒ Corporation ☐ Trust ☐ Association ☐ Other</td> </tr> <tr> <td>M Year of formation:</td> <td>1968</td> </tr> <tr> <td>N State of legal domicile:</td> <td>OK</td> </tr> </table> </td> </tr> </table>	C LIFT Community Action Agency Inc 209 N. 4th St. Hugo, OK 74743	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>D Employer identification number</td> <td>73-0772321</td> </tr> <tr> <td>E Telephone number</td> <td>580-326-3351</td> </tr> <tr> <td>G Gross receipts \$</td> <td>27,894,957.</td> </tr> </table>	D Employer identification number	73-0772321	E Telephone number	580-326-3351	G Gross receipts \$	27,894,957.	F Name and address of principal officer: Same As C Above		<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>J Tax-exempt status:</td> <td>☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527</td> </tr> <tr> <td>K Website:</td> <td>www.liftca.org</td> </tr> </table>		J Tax-exempt status:	☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527	K Website:	www.liftca.org	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>H(a) Is this a group return for subordinates?</td> <td>☐ Yes ☒ No</td> </tr> <tr> <td>H(b) Are all subordinates included?</td> <td>☐ Yes ☐ No</td> </tr> <tr> <td colspan="2">If "No," attach a list. See instructions.</td> </tr> <tr> <td>H(c) Group exemption number</td> <td></td> </tr> </table>		H(a) Is this a group return for subordinates?	☐ Yes ☒ No	H(b) Are all subordinates included?	☐ Yes ☐ No	If "No," attach a list. See instructions.		H(c) Group exemption number		<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>L Form of organization:</td> <td>☒ Corporation ☐ Trust ☐ Association ☐ Other</td> </tr> <tr> <td>M Year of formation:</td> <td>1968</td> </tr> <tr> <td>N State of legal domicile:</td> <td>OK</td> </tr> </table>		L Form of organization:	☒ Corporation ☐ Trust ☐ Association ☐ Other	M Year of formation:	1968	N State of legal domicile:	OK
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Part I Summary

1	Briefly describe the organization's mission or most significant activities: "Helping People - Changing Lives" - To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.				
2	Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.				
3	Number of voting members of the governing body (Part VI, line 1a)	3		27	
4	Number of independent voting members of the governing body (Part VI, line 1b)	4		27	
5	Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5		464	
6	Total number of volunteers (estimate if necessary)	6		1,612	
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a		0.	
7b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b		0.	
8	Contributions and grants (Part VIII, line 1h)	Prior Year		Current Year	
		16,006,863.		17,846,476.	
9	Program service revenue (Part VIII, line 2g)	6,681,726.		9,194,562.	
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	119,032.		36,467.	
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	684,604.		662,304.	
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	23,492,225.		27,739,809.	
13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)				
14	Benefits paid to or for members (Part IX, column (A), line 4)				
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	10,542,735.		11,604,665.	
16a	Professional fundraising fees (Part IX, column (A), line 11e)				
b	Total fundraising expenses (Part IX, column (D), line 25)				
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	12,842,666.		15,410,047.	
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	23,385,401.		27,014,712.	
19	Revenue less expenses. Subtract line 18 from line 12	106,824.		725,097.	
20	Total assets (Part X, line 16)	Beginning of Current Year		End of Year	
		19,933,272.		22,486,757.	
21	Total liabilities (Part X, line 26)	719,955.		1,544,732.	
22	Net assets or fund balances. Subtract line 21 from line 20	19,213,317.		20,942,025.	

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer Rebecca Reynolds Type or print name and title	Date Executive Dir.	
Paid Preparer Use Only	Print/Type preparer's name Deborah Bonner, CPA	Preparer's signature Deborah Bonner, CPA	Date Check ☐ if self-employed PTIN P01385237
	Firm's name Saunders & Associates PLLC	Firm's address 630 East 17th Street Ada, OK 74820	Firm's EIN 20-8209116 Phone no. (580) 332-8548

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

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

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

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

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

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

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

4a (Code:) (Expenses \$ 12,317,271. including grants of \$) (Revenue \$ 4,272,184.)

EARLY CHILDHOOD - Pre-school and daycare programs for low-income and handicapped
children, funded by federal/state grants and parent fees. Early Childhood expenses
are approximately 54% of program service expenses.

Early Head Start - 93 infants & toddlers received services through 3 centers. Early
Head Start/Child Care Partnership/Early Learning Centers.

Head Start - 496 children were provided Head Start services in 28 classrooms.

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

4b (Code:) (Expenses \$ 4,509,507. including grants of \$) (Revenue \$ 230,362.)

See Schedule O

4c (Code:) (Expenses \$ 3,556,510. including grants of \$) (Revenue \$ 41,746.)

See Schedule O

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

(Expenses \$ 2,596,857. including grants of \$) (Revenue \$ 1,016,171.)

4e Total program service expenses 22,980,145.

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules (continued)

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

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

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

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. 2a 464		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O.	3b	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
d If "Yes," indicate the number of Forms 8282 filed during the year. 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12. 10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. 10b		
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders. 11a		
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) 11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year. 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state?	13a	
Note: See the instructions for additional information the organization must report on Schedule O.		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. 13b		
c Enter the amount of reserves on hand. 13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O.	14b	
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	15	X
If "Yes," see the instructions and file Form 4720, Schedule N.		
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?	16	X
If "Yes," complete Form 4720, Schedule O.		
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person, engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?	17	
If "Yes," complete Form 6069.		

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

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

Section A. Governing Body and Management

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

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

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

Section C. Disclosure

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

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

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

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

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

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

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

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

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

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

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

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Rebecca Reynolds Executive Dir.	40 0			X				124,058.	0.	31,165.
(2) Sheree Ensley Fiscal Officer	40 0			X				77,974.	0.	19,567.
(3) Cathie Carothers Board Member	0.5 0	X						0.	0.	0.
(4) Danny Cornish Board Member	0.5 0	X						0.	0.	0.
(5) Tina Foshee-Thomas Board Member	0.5 0	X						0.	0.	0.
(6) Jordan Hill Board Member	0.5 0	X						0.	0.	0.
(7) Kevin Cory Board Member	0.5 0	X						0.	0.	0.
(8) Cindy Logan Board Member	0.5 0	X						0.	0.	0.
(9) Kelli Stacey Board Member	0.5 0	X						0.	0.	0.
(10) Andrea Henkel Board Member	0.5 0	X						0.	0.	0.
(11) Vickie Leathers Board Member	0.5 0	X						0.	0.	0.
(12) Sandra Meeks Board Member	0.5 0	X						0.	0.	0.
(13) Dwight Satterfield Board Member	0.5 0	X						0.	0.	0.
(14) Brent Franks Board Member	0.5 0	X						0.	0.	0.

Form 990 (2023) LIFT Community Action Agency Inc

73-0772321

Page 8

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) Wade Scott Board Member	0.5 0	X						0.	0.	0.
(16) David Smith Board Member	0.5 0	X						0.	0.	0.
(17) Vicky Wade Board Member	0.5 0	X						0.	0.	0.
(18) William Smith Board Member	0.5 0	X						0.	0.	0.
(19) Patsy Guess Board Member	0.5 0	X						0.	0.	0.
(20) Jia Johnson Board Member	0.5 0	X						0.	0.	0.
(21) Craig Young Board Member	0.5 0	X						0.	0.	0.
(22) David Hawkins Chairman	2 0	X		X				0.	0.	0.
(23) Leah Thomas Vice Chairman	1.5 0	X		X				0.	0.	0.
(24) Brad Burgett Sec/Treas	1 0	X		X				0.	0.	0.
(25) Kara Maness Board Member	0.5 0	X						0.	0.	0.
1b Subtotal								202,032.	0.	50,732.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								202,032.	0.	50,732.

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

3 Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

	Yes	No
3		X

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

4	X	
---	---	--

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

5		X
---	--	---

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
Total Cleaning Service PO Box 64 Hugo, OK 74743	Janitorial	127,840.
Dave's Air 927 N 4180 Rd Hugo, OK 74743	HVAC	114,120.

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

Part VIII Statement of Revenue

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants, and Other Similar Amounts	1a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c	3,900.				
	d Related organizations	1d					
	e Government grants (contributions)	1e	16,526,380.				
	f All other contributions, gifts, grants, and similar amounts not included above ...	1f	1,316,196.				
	g Noncash contributions included in lines 1a-1f	1g	1,268,433.				
	h Total. Add lines 1a-1f.		17,846,476.				
Program Service Revenue	Business Code						
	2a <u>Program Fees</u>	624200	5,563,220.	5,563,220.			
	b <u>Program Recoveries</u>	900099	3,631,342.	3,631,342.			
	c						
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f.		9,194,562.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		129,420.			129,420.	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6a Gross rents	(i) Real	(ii) Personal				
		6a	664,453.				
		b Less: rental expenses	6b				
	c Rental income or (loss)	6c	664,453.				
	d Net rental income or (loss)		664,453.	664,453.			
	7a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		7a	59,926.				
		b Less: cost or other basis and sales expenses	7b	152,879.			
		c Gain or (loss)	7c	-92,953.			
	d Net gain or (loss)		-92,953.	-92,953.			
	8a Gross income from fundraising events (not including \$ 3,900. of contributions reported on line 1c). See Part IV, line 18	8a					
		b Less: direct expenses	8b	2,269.			
c Net income or (loss) from fundraising events			-2,269.				
9a Gross income from gaming activities. See Part IV, line 19	9a						
	b Less: direct expenses	9b					
	c Net income or (loss) from gaming activities						
10a Gross sales of inventory, less returns and allowances	10a						
	b Less: cost of goods sold.	10b					
	c Net income or (loss) from sales of inventory						
Miscellaneous Revenue	Business Code						
	11a <u>Miscellaneous</u>	900099	120.	120.			
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d.		120.				
12 Total revenue. See instructions.			27,739,809.	9,766,182.	0.	129,420.	

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	252,764.	219,602.	33,162.	0.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	8,828,753.	7,670,807.	1,157,946.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.	2,523,148.	2,157,796.	365,352.	
10 Payroll taxes.				
11 Fees for services (nonemployees):				
a Management.				
b Legal.				
c Accounting.				
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	1,686,088.	1,515,271.	170,817.	
12 Advertising and promotion.	122,968.	106,377.	16,591.	
13 Office expenses.	12,324.	7,057.	5,267.	
14 Information technology.				
15 Royalties.				
16 Occupancy.	844,670.	794,229.	50,441.	
17 Travel.	632,781.	564,760.	68,021.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.	242,667.	237,434.	5,233.	
20 Interest.	336.		336.	
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	426,711.		426,711.	
23 Insurance.	2,043,162.	597,325.	1,445,837.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a <u>Equipment & Facilities</u>	2,610,764.	2,484,009.	126,755.	
b <u>Indirect Costs</u>	1,968,972.	1,905,601.	63,371.	
c <u>Food</u>	1,579,889.	1,567,526.	12,363.	
d <u>Match Expense</u>	1,268,433.	1,268,433.		
e All other expenses.	1,970,282.	1,883,918.	86,364.	
25 Total functional expenses. Add lines 1 through 24e.	27,014,712.	22,980,145.	4,034,567.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash — non-interest-bearing	9,305,903.	1	11,495,739.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net	1,890,894.	3	2,109,775.
	4 Accounts receivable, net	919,570.	4	966,573.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net	485,630.	7	387,426.
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	24,618.	9	26,628.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.	10a 15,168,035.		
	b Less: accumulated depreciation	10b 7,667,419.	10c	7,500,616.
	11 Investments — publicly traded securities		11	
	12 Investments — other securities. See Part IV, line 11		12	
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11		15	
16 Total assets. Add lines 1 through 15 (must equal line 33)	19,933,272.	16	22,486,757.	
Liabilities	17 Accounts payable and accrued expenses	700,360.	17	1,533,775.
	18 Grants payable		18	
	19 Deferred revenue	3,722.	19	6,129.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D.		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	15,873.	23	4,828.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D. ...		25	
	26 Total liabilities. Add lines 17 through 25	719,955.	26	1,544,732.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33. ☒			
	27 Net assets without donor restrictions	16,859,468.	27	18,537,944.
	28 Net assets with donor restrictions	2,353,849.	28	2,404,081.
	Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33. ☐			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances.	19,213,317.	32	20,942,025.
	33 Total liabilities and net assets/fund balances.	19,933,272.	33	22,486,757.

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	27,739,809.
2	Total expenses (must equal Part IX, column (A), line 25)	2	27,014,712.
3	Revenue less expenses. Subtract line 2 from line 1	3	725,097.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	19,213,317.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O) See Schedule O	9	1,003,611.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	20,942,025.

Part XII Financial Statements and Reporting

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

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

Form 990

Continuation Sheet for Form 990

OMB No. 1545-0047

2023

Department of the Treasury
Internal Revenue Service

Name of the Organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Part VII Continuation: Officers, Directors, Trustees, Key Employees, and
Highest Compensated Employees

(A) Name and title	(B) Average hours per week (list any hours for related organiza- tions below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099- MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099- MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Tami Barnes Board Member	0.5 0	X						0.	0.	0.
(2) Consuelo Splawn Board Member	0.5 0	X						0.	0.	0.
(3) Tiffany Brockway Board Member	0.5 0	X						0.	0.	0.
(4) Kristi Graham Board Member	0.5 0	X						0.	0.	0.
(5) Sharon Johnson Board Member	0.5 0	X						0.	0.	0.
(6) Trina Low Board Member	0.5 0	X						0.	0.	0.
(7) Carolyn Pool Board Member	0.5 0	X						0.	0.	0.
(8) Jim Bob Sullivan Board Member	0.5 0	X						0.	0.	0.
(9) Debra Williams Board Member	0.5 0	X						0.	0.	0.
(10)										
(11)										
(12)										
(13)										
(14)										
(15)										
(16)										
(17)										
(18)										
(19)										
(20)										
(21)										

Form 990 Cont 2023

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

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

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

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

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

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

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

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

Schedule A (Form 990) 2023

Schedule A (Form 990) 2023

LIFT Community Action Agency Inc

73-0772321

Page 2

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	15386044.	17062153.	15441475.	16006863.	17846476.	81,743,011.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0.
3 The value of services or facilities furnished by a governmental unit to the organization without charge						0.
4 Total. Add lines 1 through 3	15386044.	17062153.	15441475.	16006863.	17846476.	81,743,011.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						0.
6 Public support. Subtract line 5 from line 4						81,743,011.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
7 Amounts from line 4	15386044.	17062153.	15441475.	16006863.	17846476.	81,743,011.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	717,092.	656,805.	726,373.	767,919.	793,873.	3,662,062.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) See Part VI	8,504.	5,630.	57,789.	39,807.	120.	111,850.
11 Total support. Add lines 7 through 10						85,516,923.
12 Gross receipts from related activities, etc. (see instructions)					12	34,336,391.
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f))	14	95.59 %
15 Public support percentage from 2022 Schedule A, Part II, line 14	15	0.00 %
16a 33-1/3% support test—2023. If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☒	
b 33-1/3% support test—2022. If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☐	
17a 10%-facts-and-circumstances test—2023. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	☐	
b 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	☐	
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	☐	

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Schedule A (Form 990) 2023

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						
6 Total. Add lines 1 through 5.						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b.						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
9 Amounts from line 6.						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f)).	15	%
16 Public support percentage from 2022 Schedule A, Part III, line 15.	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f)).	17	%
18 Investment income percentage from 2022 Schedule A, Part III, line 17.	18	%

19a 33-1/3% support tests—2023. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

b 33-1/3% support tests—2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations (continued)

- 11** Has the organization accepted a gift or contribution from any of the following persons?
- a** A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?
- b** A family member of a person described on line 11a above?
- c** A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in **Part VI**.

	Yes	No
11a		
11b		
11c		

Section B. Type I Supporting Organizations

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

	Yes	No
1		
2		

Section C. Type II Supporting Organizations

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

	Yes	No
1		

Section D. All Type III Supporting Organizations

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

	Yes	No
1		
2		
3		

Section E. Type III Functionally Integrated Supporting Organizations

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

2 Activities Test. Answer lines 2a and 2b below.

- a** Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in **Part VI** identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.
- b** Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in **Part VI** the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.

	Yes	No
2a		
2b		
3a		
3b		

3 Parent of Supported Organizations. Answer lines 3a and 3b below.

- a** Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in **Part VI**.
- b** Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in **Part VI** the role played by the organization in this regard.

Schedule A (Form 990) 2023

LIFT Community Action Agency Inc

73-0772321

Page 6

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

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

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

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

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

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Schedule A (Form 990) 2023

Schedule A (Form 990) 2023

LIFT Community Action Agency Inc

73-0772321

Page 7

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

Section D – Distributions

		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required – provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2023 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E – Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
1 Distributable amount for 2023 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2023 (reasonable cause required – explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2023			
a From 2018.			
b From 2019.			
c From 2020.			
d From 2021.			
e From 2022.			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2023 distributable amount			
i Carryover from 2018 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2023 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2023 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2024. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2019.			
b Excess from 2020.			
c Excess from 2021.			
d Excess from 2022.			
e Excess from 2023.			

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Schedule A (Form 990) 2023

Part VI

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

Part II, Line 10 - Other Income

Nature and Source	2023	2022	2021	2020	2019
Other Income	\$ 120.	\$ 39,807.	\$ 57,789.	\$ 5,630.	\$ 8,504.
Total	<u>\$ 120.</u>	<u>\$ 39,807.</u>	<u>\$ 57,789.</u>	<u>\$ 5,630.</u>	<u>\$ 8,504.</u>

Additional Explanation of Other Income

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

**Schedule B
(Form 990)**

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2023

Name of the organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

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

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

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

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

☐ 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

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

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

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

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

Schedule B (Form 990) (2023)

1 2 Page 2

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

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	DHHS-Admin for Children & Families 1301 Young St Dallas, TX 75202	\$ 7,125,703.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	Okla. Dept of Commerce 900 N Stiles OKC, OK 73104	\$ 969,418.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
3	Okla. Dept of Transportation 200 NE 21st St OKC, OK 73105	\$ 971,447.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
4	Health Resources & Service Admin. 5600 Fishers Lane Rockville, MD 20852	\$ 1,530,111.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
5	US Dept of Agriculture 1400 Independence Ave SW Washington, DC 20250	\$ 2,024,820.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
6	Okla. Dept of Education 2500 N Lincoln Blvd OKC, OK 73105	\$ 1,357,503.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Schedule B (Form 990) (2023)

2 2 Page 2

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

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	US Dept of Justice 145 N St 10th Floor Washington, DC 20530	\$ 442,254.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
8	US Dept of Labor 525 S Griffen St Room 317 Dallas, TX 75202	\$ 395,711.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
9	Community Action Proj of Tulsa Co 5330 E 31st St Ste 300 Tulsa, OK 74135	\$ 489,089.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

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Schedule B (Form 990) (2023)

Schedule B (Form 990) (2023)

1 1 Page 3

Name of organization

Employer identification number

LIFT Community Action Agency Inc

73-0772321

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

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

BAA

TEEA0703L 08/09/23

Schedule B (Form 990) (2023)

Schedule B (Form 990) (2023)

1 1 Page 4

Name of organization

LIFT Community Action Agency Inc

Employer identification number

73-0772321

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

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

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Employer identification number

LIFT Community Action Agency Inc

73-0772321

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

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

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

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

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

Part II Conservation Easements

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

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

☐ Preservation of land for public use (for example, recreation or education)	☐ Preservation of a historically important land area
☐ Protection of natural habitat	☐ Preservation of a certified historic structure
☐ Preservation of open space	

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(ii) Assets included in Form 990, Part X

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

a Revenue included on Form 990, Part VIII, line 1

b Assets included in Form 990, Part X

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

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

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

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

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

Part IV Escrow and Custodial Arrangements

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

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

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

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

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

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

Part V Endowment Funds

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

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

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

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

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

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

	Yes	No
(i) Unrelated organizations?	3a(i)	
(ii) Related organizations?	3a(ii)	
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	3b	

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

Part VI Land, Buildings, and Equipment

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		563,270.		563,270.
b Buildings		7,580,100.	2,329,434.	5,250,666.
c Leasehold improvements		2,123,011.	2,072,641.	50,370.
d Equipment		4,526,138.	3,265,344.	1,260,794.
e Other	375,516.			375,516.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B)).				7,500,616.

BAA

Schedule D (Form 990) 2023

Part VII Investments – Other Securities

N/A

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

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

Part VIII Investments – Program Related

N/A

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

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

Part IX Other Assets

N/A

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

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

Part X Other Liabilities

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

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

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

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

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

1	Total revenue, gains, and other support per audited financial statements	1	27,835,031.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	27,835,031.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.) See Part XIII	4b	-95,222.
c	Add lines 4a and 4b	4c	-95,222.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	27,739,809.

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

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

1	Total expenses and losses per audited financial statements	1	27,016,981.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.) See Part XIII	2d	2,269.
e	Add lines 2a through 2d	2e	2,269.
3	Subtract line 2e from line 1	3	27,014,712.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	27,014,712.

Part XIII Supplemental Information

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

Part X - FASB ASC 740 Footnote

LIFT Community Action Agency, Inc. qualifies as an organization exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code. LCAA is subject to a tax on income from any unrelated business. LCAA has no unrelated business income for 2023 or 2022.

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

Part XIII Supplemental Information (continued)

Part X - FASB ASC 740 Footnote (continued)

return should be recorded in the financial statements. Under that guidance, LCAA may recognize the tax benefit from an uncertain tax position only if it is more likely than not that the tax position will be sustained on examination by taxing authorities based on the technical merits of the position. Examples of tax positions include the tax-exempt status of the organization and various positions related to the potential sources of unrelated business taxable income (UBIT). The tax benefits recognized in the financial statements from such a position are measured based on the largest benefit that has a greater than 50 percent likelihood of being realized upon ultimate settlement. There were no unrecognized tax benefits identified or recorded as liabilities for fiscal years 2023 and 2022.

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

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

Fundraising Expense.....	\$	-2,269.
Gain/Loss Asset Disposition.....		-92,953.
	Total \$	<u>-95,222.</u>

**Schedule D, Part XII, Line 2d
Other Expenses And Losses Per Audited F/S**

Fundraising Expense.....	\$	2,269.
	Total \$	<u>2,269.</u>

SCHEDULE J
(Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization

Employer identification number

LIFT Community Action Agency Inc

73-0772321

Part I Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. ☐ First-class or charter travel ☐ Travel for companions ☐ Tax indemnification and gross-up payments ☐ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☐ Health or social club dues or initiation fees ☐ Personal services (such as maid, chauffeur, chef)		
b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.	1b	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?	2	
3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III. ☐ Compensation committee ☐ Independent compensation consultant ☐ Form 990 of other organizations ☐ Written employment contract ☐ Compensation survey or study ☒ Approval by the board or compensation committee		
4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:		
a Receive a severance payment or change-of-control payment?	4a	X
b Participate in or receive payment from a supplemental nonqualified retirement plan?	4b	X
c Participate in or receive payment from an equity-based compensation arrangement?	4c	X
If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.		
Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.		
5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
a The organization?	5a	X
b Any related organization?	5b	X
If "Yes" on line 5a or 5b, describe in Part III.		
6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:		
a The organization?	6a	X
b Any related organization?	6b	X
If "Yes" on line 6a or 6b, describe in Part III.		
7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III.	7	X
8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.	8	X
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9	

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

Schedule J (Form 990) 2023

Schedule J (Form 990) 2023 **LIFT Community Action Agency Inc** 73-0772321 Page 2

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation				(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation	(C) Retirement and other deferred compensation			
Rebecca Reynolds	(i)	124,058.	0.	0.	31,165.	0.	155,223.	0.
1 Executive Dir.	(ii)	0.	0.	0.	0.	0.	0.	0.
2	(i)							
	(ii)							
3	(i)							
	(ii)							
4	(i)							
	(ii)							
5	(i)							
	(ii)							
6	(i)							
	(ii)							
7	(i)							
	(ii)							
8	(i)							
	(ii)							
9	(i)							
	(ii)							
10	(i)							
	(ii)							
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							

Schedule J (Form 990) 2023 LIFT Community Action Agency Inc 73-0772321 Page 3

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

**SCHEDULE M
(Form 990)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

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

Attach to Form 990.

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

OMB No. 1545-0047

2023

**Open to Public
Inspection**

Name of the organization

Employer identification number

LIFT Community Action Agency Inc

73-0772321

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art – Works of art.....				
2 Art – Historical treasures.....				
3 Art – Fractional interests.....				
4 Books and publications.....				
5 Clothing and household goods.....				
6 Cars and other vehicles.....				
7 Boats and planes.....				
8 Intellectual property.....				
9 Securities – Publicly traded.....				
10 Securities – Closely held stock.....				
11 Securities – Partnership, LLC, or trust interests.....				
12 Securities – Miscellaneous.....				
13 Qualified conservation contribution – Historic structures.....				
14 Qualified conservation contribution – Other.....				
15 Real estate – Residential.....				
16 Real estate – Commercial.....				
17 Real estate – Other.....				
18 Collectibles.....				
19 Food inventory.....				
20 Drugs and medical supplies.....				
21 Taxidermy.....				
22 Historical artifacts.....				
23 Scientific specimens.....				
24 Archeological artifacts.....				
25 Other (Match.....).....	X	15	1,268,433	FMV
26 Other (.....).....				
27 Other (.....).....				
28 Other (.....).....				

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

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?.....		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?.....		X
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?.....		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

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

Schedule M (Form 990) 2023

Schedule M (Form 990) 2023 LIFT Community Action Agency Inc 73-0772321 Page 2

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

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization

Supplemental Information to Form 990 or 990-EZ

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

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

OMB No. 1545-0047

2023

**Open to Public
Inspection**

LIFT Community Action Agency Inc

Employer identification number

73-0772321

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

HOUSING - Rehab and weatherization of homes for low income and section 8 housing for low-income, funded by federal/state grants and tenant rental payments. Housing expenses are approximately 20% of program service expenses.

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

Self Help Housing - 18 families are building new homes in 2023 in the eight Southeast Oklahoma counties serviced.

Weatherization - 27 homes were weatherized within the newly expanded territories of Atoka, Bryan, Carter, Choctaw, Coal, Johnston, Love, Marshall, McCurtain, Murray, Pontotoc and Pushmataha in 2023 to reduce energy consumption making their homes more energy efficient and affordable.

Technical and Management Assistance Programs - T&MA staff provided training and monitoring to 19 self-help housing grantees in Region II with approximately \$24 million in Rural Development 502/504 construction/rehab budgets and approximately \$9.5 million in Rural Development Section 523 administrative budgets. 6 of the grantees operate a repair and rehab grant to provide technical assistance for homeowners to have decent, safe, sanitary and increased energy efficiency of their homes.

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

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

Court Appointed Special Advocates (CASA) - 70 youth were served by 10 volunteers who contributed hundreds of volunteer hours in service to youth in the court system. 30 children had their cases resolved.

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

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

Healthy Start - 381 pregnant women, 137 inter-conception participants, 239 children, 230 new babies, and 40 fathers were served within the tri-county area.

Rx for Oklahoma - 4 individuals were assisted in getting their prescriptions for free or a reduced cost.

Victims Advocacy Services - Provides support services for victims of crime. 140 victims were served in 2023. 1,178 victims received services since inception in July 2015.

Emergency Assistance - Through funding received from the Emergency Food & Shelter Program, CSBG-CARES, and local donations to the LIFT Emergency fund and through Salvation Army bell ringing, a total of 28 individuals/families received much needed emergency assistance.

Safe Place Healing Hearts - Served 222 victims in areas of domestic violence, sexual assault, dating violence, and stalking victims. Since inception in 2017 a total of 1,982 victims have been served.

Youth Build - Provided pathways to education and employment through provision of high school education, construction apprenticeship training and life skills activities. Served 37 individuals since receiving new grant award.

Tri-County Opiod - Educated 22 volunteer fire departments on how to administer Narcan/Naloxone, opiod misuse, and stigma surrounding opiod use disorder. Conducted 4 Medication Take Back events and received 26 lbs of prescription medicine for proper disposal. Partnered with Parents Helping Parents to start a parent support group for parents with children dealing with addiction issues or who are in recovery.

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

TRANSPORTATION - Provision of public transportation services, funded by federal grants, local contracts and participation fees. Transportation expenses are

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

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

approximately 7% of program service expenses. 291,491 miles were driven with accounting for 48,422 passenger trips provided by a fleet of 41 vehicles. 7,513 elderly clients were served and 9,690 trips for passengers with disabilities were provided.

ECONOMIC DEVELOPMENT - Foster economic and industrial development in a three county enterprise community. Economic Development expenses are approximately 4% of total program service expenses.

Intermediary Program - LIFT was designated by the Rural Housing Services division of USDA/Rural Development as an Intermediary assisting certified loan packagers in Texas, North Dakota, South Dakota, Kansas, Arkansas, Louisiana, Missouri, Nebraska and Oklahoma. In 2023, we assisted 19 non-profit agencies in those states in submitting 144 packagers to Rural Development for review and assisted with 56 closings.

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

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

Form 990 was sent via email to all board members for their review before filing. An electronic vote was received from the Finance/Audit/Loan Committee to approve the filing of the Form 990. Documentation is on file in the administrative office.

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

Annual review and training is held during board meeting. Board members review a list of employees, a list of vendors, and disclose any relations. Policy and disclosure are signed.

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

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

Board members review and set compensation for the Executive Director on an annual basis.

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

Other staff are reviewed annually, compensation is set on pay scale and availability of funds.

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

Upon request documents may be viewed in the administration office. Some documents are annually posted on the website including audits, Form 990, and agency budgets. Three years are readily accessible via the agency website.

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

Capitalized Fixed Assets.....	\$ 1,003,611.
Total	<u>\$ 1,003,611.</u>

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization

LIFT Community Action Agency Inc

Related Organizations and Unrelated Partnerships

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
Attach to Form 990.

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

OMB No. 1545-0047

2023

**Open to Public
Inspection**

Employer identification number

73-0772321

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

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

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

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

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

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

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

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

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

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

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) Belmont Place Senior Housing	q	13,099.	Cost
(2) Clayton Place Senior Housing	q	6,405.	Cost
(3) Kiamichi Place Senior Housing	q	9,555.	Cost
(4) Southeast Okla Community Dev Corp	q	42,924.	Cost
(5)			
(6)			

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

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

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

Part VII **Supplemental Information**

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

Form **8868**

(Rev. January 2024)

Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return or Excise Taxes Related to Employee Benefit Plans

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

OMB No. 1545-0047

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

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

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

Part I – Identification

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

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

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 4720 (other than individual)	09
Form 4720 (individual)	03	Form 5227	10
Form 990-PF	04	Form 6069	11
Form 990-T (section 401(a) or 408(a) trust)	05	Form 8870	12
Form 990-T (trust other than above)	06	Form 5330 (individual)	13
Form 990-T (corporation)	07	Form 5330 (other than individual)	14
Form 1041-A	08		

- After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330.

- If this application is for an extension of time to file Form 5330, you must enter the following information.

Plan Name _____
Plan Number _____
Plan Year Ending (MM/DD/YYYY) _____

Part II – Automatic Extension of Time To File for Exempt Organizations (see instructions)

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

Telephone No. 580-326-3351 Fax No. _____

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

- 1 I request an automatic 6-month extension of time until 11/15, 2024, to file the **exempt organization return** for the organization named above. The extension is for the organization's return for:

☒ calendar year 20 23 or
☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

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

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

4/30/24

Form 512-E
2023

Oklahoma Return of Organization Exempt from Income Tax

Section 501(c) of the Internal Revenue Code

PART 1

For the year January 1 - December 31, 2023, or other taxable year beginning: 1/1 2023 ending: 12/31 2023

Name of Organization

Federal Employer Identification Number

Date Qualified for Tax Exempt Status

LIFT COMMUNITY ACTION AGENCY INC

730772321

1968

Address (Number and street)

209 N 4TH ST

City

State or Province

Country

ZIP or Foreign Postal Code:

HUGO

OK

USA

74743

Place an 'X' if: (1) Initial Return (2) Final Return (3) Amended Return (See Schedule 512-E-X on page 2)

PART 2: STATEMENT OF UNRELATED BUSINESS TAXABLE INCOME

(Please read instructions on pages 3-4)

- A Total unrelated trade or business income - applicable Federal Form(s) 990.....
- B Total unrelated trade or business deductions - applicable Fed. Form(s) 990.....
- C Unrelated business taxable income - enter here and on line 1 below.....

Total Federal

Allocable Oklahoma

INCOME SUBJECT TO TAX

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

TAX COMPUTATION

- | | | | |
|----|---|----|----|
| 5 | Tax at 4% of line 4. If trust, see rate schedule on page 3 and place an "1" in the box. If recapturing the Oklahoma Affordable Housing Tax Credit, add the recaptured credit here and enter a "2" in the box. If making an Okla. installment payment pursuant to IRC Sec. 965(h) and 68 OS Sec. 2368(K), add the installment payment here and enter a "3" in the box..... | 5 | 00 |
| 6 | Less: Other Credits Form (total from Form 511-CR)..... | 6 | 00 |
| 7 | Balance of tax due (line 5 minus line 6, but not less than zero)..... | 7 | 00 |
| 8 | 2023 Oklahoma estimated tax and extension payments and prior year carryforward..... | 8 | 00 |
| 9 | Oklahoma withholding (provide Form 1099, Form 500A, Form 500B or other withholding statement)..... | 9 | 00 |
| 10 | Amount paid with original return and amount paid after it was filed (amended return only)..... | 10 | 00 |
| 11 | Any refunds or overpayment applied (amended return only)..... | 11 | 00 |
| 12 | Total of lines 8 through 11..... | 12 | 00 |
| 13 | Overpayment (if line 12 is larger than line 7, enter amount overpaid)..... | 13 | 00 |
| 14 | Amount of line 13 to be credited to 2024 estimated tax (original return only)..... | 14 | 00 |



2023 Form 512-E - Page 2

Oklahoma Return of Organization Exempt from Income Tax

Name of Organization: LIFT COMMUNITY ACTION AGENCY INC	Federal Employer Identification Number: 730772321
--	---

Amount from line 14 on page 1 00

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

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

Direct Deposit Note:

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

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

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

Routing Number:

Account Number:

18	Tax Due (if line 7 is larger than line 12 enter tax due)	Tax Due	18	00
19	For delinquent payment, add penalty of 5% plus interest at 1.25% per month		19	00
20	Underpayment of estimated tax interest	Annualized ☐	20	00
21	Total tax, penalty and interest due - Add lines 18-20; pay in full with return	Balance Due	21	00

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

Signature of Officer or Trustee	Date
Printed Name REBECCA REYNOLDS	
Title EXECUTIVE DIRECTOR	Phone Number 580-326-3351

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



Signature of Preparer	Date
<i>Saunders & Associates PLLC</i>	<i>5/17/24</i>
Printed Name of Preparer DEBORAH BONNER, CPA-SAUNDERS & ASSOC PLLC	
Phone Number 580-332-8548	Preparer's PTIN P01385237

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

- A** Did you file an amended Federal income tax return? ☐ Yes ☐ No
Provide a copy of the amended Federal return and a copy of "Statement of Adjustment", IRS refund check or deposit slip.
- B** If this return is being filed due to a Federal audit, provide a complete copy of the RAR.
- C** Explanation or reason for amended return (provide all necessary schedules):

Do not staple documentation to this form. To attach items, please use a paper clip.

Mailing Address for this form: PO Box 26800, Oklahoma City, OK 73126-0800

The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.

LIFT

Community Action Agency, Inc.

Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman

PROCLAMATION

WHEREAS, in 2002, President George W. Bush declared Homeownership as an important part of the American Dream; and

WHEREAS, homeownership provides shelter and improves safety for families and their children to prosper and thrive; and

WHEREAS, for many Americans, their home is an important financial investment, and a great source of personal pride as well as an important part of community stability; and

WHEREAS, homeownership encourages individual responsibility and instills the importance of building strong families; and

WHEREAS, in communities where homeownership prospers, neighborhoods become more stable and civic-minded, schools are better and crime rates decline; and

WHEREAS, due to resources available in America, more citizens own homes today than at any other time in our history, but among low-income families especially, many are still unaware of the opportunities available and the steps necessary to becoming homeowners.

As such, LIFT Community Action Agency, Inc. is working to provide all families in its service area with the tools and information they need to overcome the barriers of becoming homeowners.

NOW, THEREFORE, the Board of Directors of LIFT Community Action Agency, Inc. does hereby resolve to support the designation of June 2024 as

NATIONAL HOMEOWNERSHIP MONTH

and we urge all of our local citizens to join us in celebrating homeownership and recognizing its importance in building strong communities and families.

IN WITNESS WHEREOF, signed this 11th day of June, 2024.

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



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





**OKLAHOMA CASA ASSOCIATION
BASE GRANT APPLICATION**

FY 2025 Goals and Objectives

October 1, 2024 – September 30, 2025

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

Objective 1.1: To enhance LIFT CASA staff capacity through the provision of ongoing professional development training and other opportunities at least quarterly.

- a. Attend monthly case staffing meetings with multisystem, interagency, and multidisciplinary investigation and treatment teams or task forces.
- b. Assist with the provision or coordination of training (held at least quarterly) for volunteers and partner agencies to improve response, documentation, information gathering, services, etc. in cases of child abuse or neglect.

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

Objective 2.1: To conduct a presentation at least one time per quarter to area clubs, civic groups, social organizations, community groups and others, for a total of four completed by September 30, 2025.

- a. Contact local groups to schedule speaking engagements and provide speakers for presentations.
- b. Attend monthly meetings of partner community groups, such as the Rotary Club and County Turning Point Coalitions.

Objective 2.2: To recruit 10 potential CASA volunteers by September 30, 2025.

- a. Hold four (one per quarter) information and orientation gatherings, inviting interested citizens and the public to attend.
- b. Involve current African American and American Indian CASA volunteers in the recruitment process during the program year.
- c. Submit a minimum of four articles (one per quarter) to be published in publications such as local newspapers and agency or program newsletters.
- d. Broadcast public service announcements daily on local radio stations and hold radio interviews (when available) with staff and volunteers at local events.
- e. Continue to utilize a staff member dedicated to program outreach via social media outlets, to assist with posts for the program at a frequency of one time per week.
- f. Increase community awareness events and activities within African American and American Indian communities, at a frequency of at least once per quarter.
- g. Participate in three public community events, providing public information as well as distributing volunteer applications and information packets to interested persons.

h. Provide information packets and volunteer applications to all persons who inquire about the CASA Program within 48 hours.

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

Objective 3.1: To screen and train at least four new CASA volunteers overall by September 30, 2025.

- a. Effectively screen potential volunteers through background checks, personal reference checks, and staff-conducted interviews during the program year.
- b. Provide at least two initial training sessions for new volunteers.
- c. Offer CASA Volunteer trainings at non-traditional times at least once per quarter to better fit the schedules of potential volunteers.
- d. Provide a minimum of 12 hours of continuing education in-service to all CASA volunteers.

Objective 3.2: To provide 15 volunteers available to act as Court Appointed Special Advocates by September 30, 2025.

- a. Serve at least 30 children through court appointments as provided through Title 10.
- b. Assist CASA volunteers in conducting a full and independent researching of each case, and in providing written information and recommendations to the court based on the best interests of the 30 children served.
- c. Ensure monitoring of the progression and implementation of court orders for the 30 children served.
- d. Assist the volunteers in exploring or developing resources for the 30 children served in order to facilitate timely family reunification or alternate permanency situations.

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

Objective 4.1: Improve efforts centered on retaining existing CASA volunteers, achieving a retention rate of 70% by September 30, 2025.

- a. Maintain regular monthly contact with all volunteers.
- b. Hold in-service trainings quarterly and incorporate topics related to volunteer stress and case burn-out.
- c. Recognize volunteers a minimum of two times per year and celebrate their service and case completions regularly throughout the year.

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

Objective 5.1: To increase the number of cases appointed a Court Appointed Special Advocate by at least 13% during the period ending September 30, 2025.

- a. Work to strengthen relationships with the District Courts, Department of Human Services offices, and court-appointed Attorneys during the year.
- b. Ensure all cases referred to the program for appointment of a CASA volunteer are assigned in a timely and efficient manner, preferably within 24-48 hours.
- c. Assist CASA volunteers in conducting a full and independent researching of cases during the program year.



LIFT Community Action Agency, Inc.

209 North 4th
Hugo, OK, 74745
www.littledixie.org

Community Needs Assessment Survey

LIFT Community Action Agency, Inc. regularly conducts a survey to determine what the needs are in your community so we will know where to best focus our efforts and funding. Your help in completing this survey is sincerely appreciated.

Please list your City _____, County _____, and Zip Code _____

Check the response that best represents you.

4. What is your gender?

- ☐ Male ☐ Female ☐ Prefer not to answer ☐ Other
() Non-binary () Trans/Male () Trans/Female

6. What is your race?

- ☐ White or Caucasian ☐ Black or African American
☐ Asian ☐ American Indian or Alaska Native
☐ Native Hawaiian or Other Pacific Islander
☐ Other _____

8. What best describes your household?

- ☐ Two Parent ☐ Single Parent Female
☐ Single Parent Male ☐ Multifamily household
☐ Single person ☐ Two adults no children
☐ Grandparent(s) raising grandchildren

10. What is the primary language spoken in the home?

- ☐ English ☐ Spanish ☐ Other _____

12. Anyone in your household receive disability benefits?

- ☐ Yes ☐ No

If yes, please mark # of each below:

_____ # of Children _____ # of Adults

14. Mark the choice that best describes you:

- ☐ Client of Agency
(Have received services from agency. Example – Tax Preparation)
☐ Agency Board Member
☐ Agency Volunteer
☐ Representative of an educational institution
(Public or private school, college, technical school)
☐ Representative of a government entity
(City, County, State, or Federal)
☐ Representative of a private organization
(Business, local civic group)
☐ Representative of a faith-based organization
(Church or other religious organization)
☐ Representative of a community based organization
(Nonprofit entities providing direct services)
☐ General Public
(Have NOT received services from the agency)

5. What is your ethnicity?

- ☐ Hispanic ☐ Non-Hispanic

7. What is your highest level of education completed?

- ☐ Less than 9th grade ☐ 9th-12th grade (no diploma)
☐ High School Diploma/GED ☐ Technical School/Votech
☐ Some college (no degree) ☐ Associate's degree
☐ Bachelor's degree ☐ Graduate/Professional

9. WRITE IN THE NUMBER of persons for each age group in your household.

_____ 0-2 _____ 3-4 _____ 5-9 _____ 10-14
_____ 15-17 _____ 18-19 _____ 20-24 _____ 25-34
_____ 35-44 _____ 45-54 _____ 55-59 _____ 60-64
_____ 65-74 _____ 75-84 _____ 85 and older

11. Is anyone in your household a veteran?

- ☐ Yes ☐ No

13. What was your total household income last year?

- ☐ Less than \$10,000 ☐ \$10,000 - \$14,999
☐ \$15,000-\$19,999 ☐ \$20,000 - \$24,999
☐ \$25,000 - \$34,999 ☐ \$35,000 - \$49,999
☐ Over \$49,999

15. What are the most important programs/services you would like to see continued in your community?

Example:

- _____ Housing
_____ Emergency Services
_____ Early Childhood Education
_____ Transportation
_____ Substance Abuse Services
_____ Health Services
_____ Senior Services
_____ Youth Services
_____ Nutrition
_____ Economic/Community Development
_____ Asset Development

Other: _____

TURN OVER TO COMPLETE PAGE 2

16. How much does each item rate as a need in your community? Please check *only one* rating for each need listed

NUTRITION	No Need	Some Need	Great Need	Don't Know
Availability/access to food (grocery store)				
Community Gardens				
Nutrition Education/Healthy Eating				
Need food				

EMPLOYMENT	No Need	Some Need	Great Need	Don't Know
Job Training				
Help finding a job				
Higher Paying Jobs or Jobs with Benefits				

HEALTH	No Need	Some Need	Great Need	Don't Know
Health Insurance/Affordable Health Care				
Health Education Services				
Mental Health Services				
Substance Abuse Counseling/Treatment				
RX (prescription assistance)				
Child Immunizations				
Teenage Pregnancy/Family Planning				
Elder Care				
Vision				
Dental Insurance/Affordable Dental				

LINKAGES	No Need	Some Need	Great Need	Don't Know
Prisoner Discharge Services				
Public Transportation				
Vehicle Repair Assistance				
Access to Services (WIC, SNAP, SSI, Sooner Care)				

INCOME MANAGMENT	No Need	Some Need	Great Need	Don't Know
Free Income Tax Preparation Assistance				
Gambling Counseling				
Budget/Credit/Debit Counseling				

EDUCATION	No Need	Some Need	Great Need	Don't Know
Early Childhood Education Programs				
GED Classes				
English as a Second-Language Classes				
Computer Skills Training				
Literacy Classes				
Technical and Vocational Training				
Childcare				

HOUSING	No Need	Some Need	Great Need	Don't Know
Decent affordable houses to RENT				
Decent affordable houses to BUY				
Weatherization (Home Energy Improvement)				
Home Repair				
Home Buyer Education				
Handicap Accessibility Housing				
Senior Citizens Housing				
Rental Assistance				
Utility Assistance				

COMMUNITY	No Need	Some Need	Great Need	Don't Know
Safe Neighborhoods, sidewalks, parks				
Homeless Shelter				
Senior Activities				
Recreational Activities				
Youth Activities				
Crime Prevention				
Additional Health Care Facilities (Doctor's Offices, Clinics, Pharmacies)				
Legal Assistance				
Volunteer Opportunities				

Please describe any other need that was not listed above:

Thank you for your participation!



National CASA Core Model

National CASA Board of Trustees Approved Oct. 11, 2016

The National CASA Association core model identifies the foundational elements of CASA/GAL best interest advocacy. This includes our guiding principle, the types of cases served, the primary activities performed by CASA/GAL volunteers, parameters for staff serving cases and the screening, training and supervision requirements. National CASA assistance and support is limited to core model activities.

The National CASA Core Model:

The CASA/GAL program provides screened, trained, and qualified community volunteers to advocate for the best interests of children and youth who are before the court as a result of abuse or neglect as defined by the state child welfare laws¹, living at home or in out-of-home care. State statute takes precedence if it provides for the CASA/GAL volunteer to take other types of cases.

CASA/GAL best interest advocacy is driven by the guiding principle that children grow and develop best with their family of origin if that can be safely achieved. CASA/GAL volunteers serve children from birth through the age defined by state statute as the limit to youth remaining in care.

CASA/GAL volunteers advocate for children's best-interest through the following activities:

- Information gathering
- Visit the child at least monthly
- Collaborate and coordinate with legal, child welfare and other partners to assure service provision that is in the child's best interests
- Report to the court with recommendations regarding the child's placement and needed services
- Monitor the case until released by the court

¹ State statute takes precedence if it provides for the CASA/GAL volunteer to take other types of cases. National CASA assistance and support is limited to work with dependent children who have experienced abuse or neglect. CASA/GAL staff serving children is kept to a minimum and only occurs under extraordinary circumstances or when mandated. Anyone serving children must adhere to the service provisions and standards outlined in the core model.



CASA/GAL volunteers are:

- Screened per National CASA/GAL Association Standards
- Trained according to National CASA/GAL Training and Facilitation Standards
- Supported by staff or peer in accordance with National CASA/GAL Standards

EFFECTIVE DATE: May 10, 2019 (last updated)

APPROVED BY: Tara Perry

TITLE: Chief Executive Officer

BUILDING STRONGER COMMUNITIES

HIGHLIGHTING THE 26-YEAR RELATIONSHIP BETWEEN
NEIGHBORWORKS® AND LIFT COMMUNITY ACTION AGENCY, INC.

ABOUT NEIGHBORWORKS AMERICA

NeighborWorks® America is a national nonprofit organization created by Congress in 1978 to provide financial support, technical assistance, and training for community-based revitalization efforts. The Corporation supports a network of nearly 240 NeighborWorks® organizations that build decent, affordable housing, strengthen communities and enhance economic support. NeighborWorks America mission is to create opportunities for people to live in affordable homes, improve their lives and strengthen their communities.

LIFT & NEIGHBORWORKS

LIFT Community Action Agency, Inc. became a chartered member of NeighborWorks® in October of 1997. Today, this nationwide network consisting of more than 240 trained and certified community development organizations are at work in nearly 4,000 communities across America. Working in partnership with others, NeighborWorks® organizations are leaders in revitalizing communities and creating affordable housing opportunities for low-and moderate-income families.

As a chartered member of NeighborWorks®, LIFT is certified to meet a high standard of fiscal integrity and service performance to assist local residents in developing leadership, improving their neighborhoods and securing decent, affordable housing. Through NeighborWorks®, we have access to financial resources, tools, training opportunities, and the experience of hundreds of colleagues from around the county who assist us in making our community a better place to live.

BUILDING STRONG COMMUNITIES

Support is provided to network members through grants, community impact, technical assistance, training and leadership development and organizational assessment. Additionally, advancing Race, Equity Diversity and Inclusion is a corporate priority.

With the support of NeighborWorks® America and its network in FY23, LIFT...

131

Homeowners Created
and/or Preserved

316

Jobs created and/or
maintained

\$245,750

Grant Funding Received
from NeighborWorks

209:1

Investment per Dollar of
NeighborWorks Funding

What is ERSEA?

From the application process to enrollment continuing through the completion of the program, all participants must flow through the ERSEA system

Eligibility

Determining those qualified to receive services:

- Income based on the current Federal Poverty Guidelines (updated annually in January)
- Categorically Eligible
- Income Eligible
- Must meet age requirements for each program

Recruitment

All agency staff participate in recruitment:

- Word of mouth
- Wearing agency apparel in public
- Attending community events
- Flyers
- Yard signs

Selection

Based on the Community Needs Assessment, points are determined to ensure families with the greatest need are served first.

Some factors for calculating points:

- Disabilities
- Income
- Family size
- Parental status
- Homeless/Foster Care

Enrollment

Based on the number of funded slots that are granted for each program

Head Start: 387

Early Head Start: 48

Early Head Start Child Care: 120

Attendance

Enrolled participants are expected to maintain an 85% attendance rate.

Attendance is monitored throughout the program year

Eligibility Determination Process

Head Start/Early Head Start/Early Head Start Child Care Programs

All participants in Federally Funded Head Start/Early Head Start/Early Head Start Child Care programs must have eligibility determinations completed prior to acceptance into the program. These are the steps taken to determine individual eligibility for services.

STEP 1

Staff member conducts
interview



Interview can be
conducted in person or
by telephone

STEP 2

Promote Confidentiality
and Sensitivity



Be respectful of family
backgrounds and
experiences

Maintain professional
boundaries and
confidential information

STEP 3

Collect required
information



Verify age eligibility for
program

Verify income for
eligibility

Step 4

Determine Eligibility
Status



Income eligibility (below
100% Poverty
Guidelines)

Public Assistance (SSI,
TAFN, or SNAP) Foster
Care

Experiencing
Homelessness

Step 5

Determine Eligibility
Points



Based on income, age,
risk factors, disabilities,
household makeup,
homelessness/foster
care and parental status

Score points using
approved selection
criteria

Step 6

Maintain Waitlist and
Enrollment



Participants with the
highest number of
eligibility points are
accepted first

Vacancies are filled
within 30 days

Selection Criteria Breakdown



● Final Score

Each participant family is scored using the same selection criteria then ranked on the waitlist by the final total number of points. As vacancies occur, the participant with the next greatest need is accepted.

● Income

Based on the family's income source and number of household members, points are assessed based on the Federal Poverty Guidelines. The lower the income, the higher the number of points.

● Age

Highest level of points are given to youngest participants in Early Head Start and 4 year olds in Head Start.

● Experiencing Homelessness/Foster Care

Categorically Eligible – Performance standards require children and families experiencing homelessness or in foster care to receive services without additional barriers.

● Other Risk Factors

Points are broken down to provide more intricate variances between otherwise similar families to rank based on specific need. Focuses on Social Services, characteristics of the primary caregiver, etc.

● Disability

Participants who apply and are eligible, by providing documentation of disability services, receive base score, with additional nominal points added for each additional service received to differentiate needs within this category.

● Multiple Participants

Additional points are given to families with multiple children, many of whom are participant siblings.

● Parental Status

Highest scoring points given to participants in greatest need whose support system is made up of a legal guardian/single parent, and least points given for two parent families.

What is a false claim?

Misleading, untrue, or “fake” information reported by a “knowing” individual to another person.

GAO Investigation 2010

US Government officials posed as applying families to determine if programs were collecting complete information and determining eligibility correctly.

- Agencies were found to not be collecting full income information to be able to determine some families eligible who otherwise would not be.

Head Start, EHS, & EHS-CC Employees

Confidential and False Claim regulations/policies are reviewed annually in training and employee personnel policy manuals.

Employees who falsify or willingly withhold information for the purpose of increasing a family's probability for eligibility:

- Are subject to disciplinary action
- Possible suspension or termination

Families

Staff interviews family on all aspects of eligibility to lessen the instances of false claims.

Applications signed by the family include an acknowledgement statement that all information is true and correct.

Families who falsify or willingly withhold information to increase their eligibility will have their application withdrawn and asked to begin the application process again.

Transit Advisory Council

Meeting Minutes

March 12, 2024

1005 S. 5th Street

Hugo, OK 74743

Jeannie McMillin, Transit Director, provided the Board with the Transportation Advisory Council Report. 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 at 9:45 a.m., Advisory Council members were advised that the transit advisory board needed to appoint a new vice president. The vote was taken and Andrea Henkel was chosen. Ms. Henkel accepted the nomination. 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.

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

May 21, 2024
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, May 21, 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.

A quorum was not met, members present were Teaha Crow, Boswell II; Steve Woldanski, Hugo EHS; Lisa Heady and Kara Maness, 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 April 16, 2024 meeting. Copies of the minutes were provided to the council for review. Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

Consideration, Discussion, and Vote to Enter into Executive Session to Discuss the employment, transfer, hiring, appointment, promotion, demotion or disciplining of employees: Shanaya Davie-Idabel EHS Caregiver; Keuna Willis-Substitute; Melissa Greenlee-Substitute and Makannah Smith from Idabel EHS Caregiver to Idabel II Teacher Assistant, pursuant LIFT, CAA Okla. Stat. title 25§ 307 (b) (1). Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

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. Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

Consideration, Discussion and Vote to Approve Resolution for Schools and Libraries Universal Services (E-Rate) for 2024-2025 (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.)-Mattie McKee- Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

Consideration, Discussion, and Vote to Approve EHS-Child Care Program Training and Technical Assistant Plan-Mattie McKee- Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

Consideration, Discussion and Vote to Approve HS/EHS/EHS-CC 2023-2028 Strategic Plan-Jordan Mack- Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

Consideration, Discussion and Vote to Approve the HS, EHS, SAF, Community Facilities, OECP, USDA, and Non-Fed March, 2024 Financial Statements and Credit Card Distribution Reports. Due to a quorum not being met, this item was tabled until the scheduled meeting of June 18, 2024.

Presentation of April, 2023 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director presented the April, 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 June 18, 2024 meeting. Copies will be mailed to members not present.

Presentation of the 2024-2025 Head Start Integrated Services Policies and Procedures (O. S. 5.7, 5.9): Each of the HS/EHS/EHS-CC Specialist provided copies and an overview of their component area along with changes, if any that were made to their specific policy. Policy Council members were asked to review the policies and if they had any suggestions/feedback to get with that specialist by the next scheduled Policy Council meeting.

HS/EHS/EHS-CC Program Updates: Cost-of-Living Adjustments, Change in Scope Request: Darla Galyon, HS/EHS/EHS-CC stated that all Head Start/Early Head Start and Early Head Start staff would be given a 2.35 % Cost of Living Adjustment (COLA). That this COLA would be effective 8/1/2024. Mrs. Galyon also stated that Head Start is requesting a Change in Scope for the required number of children to be enrolled from 387 to 295 due to not having qualified staff and therefore the program could not reach full enrollment.

Presentation of the HS/EHS/EHS-CC Child Outcomes/Assessment Results for Fall/Winter 2023-2024 (OS 5.7 & 5.9)-Susie Mashburn: Susie Mashburn, Education Specialist provided handouts and an overview with members, of the Fall and Winter Outcomes. The outcomes provide a visual representation of how the children are progressing.

Policy Council Training-Eligibility, Recruitment, Selection, Enrollment, and Attendance (ERSEA) Training on HS/EHS/EHS-CC Eligibility-Brittany Bailey: Bailey. Brittany Bailey, ERSEA Specialist provided handout along with an overview/discussion of what documents are needed and the application screening process on how children are selected for the HS/EHS/EHS-CC program.

Policy Council Training-Family Interactions and Activities to Do with Your Child During the

Summer: Sara Moore, Professional Development Specialist and Taryn Creasman, Family and Community Engagement Specialist both provided handouts with an overview and discussion on “10 Things You Can Do This Summer To Get Your Child Ready For Kindergarten” and “Toddler Summer Bucket List.”

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey, ERSEA Specialist reported that as of today, 5/21//2024 295 children have been enrolled in the Head Start classrooms. Head Start attendance was 87.5%. Early Head Start currently has 48 children enrolled and attendance was 84.5%. Early Head Start-CC currently has 108 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, Jordan Mack, HS/EHS/EHS-CC Assistant Director provided a copy and an overview summary of meals and snacks served for April, 2024.

Governing Board Report: Mattie McKee- Mattie McKee, HS/EHS/EHS-CC Assistant Director stated that the Governing Board Met on May 14, 2024. An Agenda was provided along with an overview of the meeting for council members present. She stated that all HS/EHS/EHS-CC items had been approved.

Data Analysis-Jordan Mack-Jordan Mack gave an overview of the data assessed for March, 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 due to a quorum not being met, the meeting ended at 11:31 a.m.

Lindsey Kent-Chairperson
Key'Osha Jones-Vice-Chairperson
Titeuna Mitchell-Secretary



Employee of the Month Nomination

Please place an X beside all of the qualities that apply to the person you are nominating, and then write a few words about how each characteristic applies to the person being nominated.

Example: X --Has good customer service--Mary always smiles and says hi to everyone who comes in the office.

Not all qualities will apply to every person. You may also add additional good qualities that the person has in the "other" blanks on the back side of this form. If you would like to elaborate, you can use the empty square on the second page of this form to provide more details of the good work habits of the person you are nominating. Or, you can use the empty space to describe something really good that the person has done.

Date: 6/3/2024

Name of Person being nominated for Employee of the Month: Sylvia Watkins

Name of Person submitting the nomination: Jeannie McMillin

<u>X</u>	Is a hard worker	<u>Gives 100% to every task.</u>
<u>X</u>	Respects others	<u>Sylvia works well with other staff and the public.</u>
<u>X</u>	Is on time	<u>Demonstrates punctuality.</u>
<u>X</u>	Is organized	<u>Creates task lists when assigns projects</u>
<u>X</u>	Keeps a positive attitude	<u>Sylvia is pleasant and professional in all cirumstances.</u>
<u>X</u>	Encourages other people	<u>Sylvia is a cheerleader for the agency and staff.</u>
<u>X</u>	Is willing to help others	<u>Sylvia jumps in to help with whatever needs to be done.</u>
<u>X</u>	Makes a good first impression	<u>Sylvia always has a smile and pleasant greeting.</u>
<u>X</u>	Follows all workplace rules	<u>Sylvia faithfully follows the rules.</u>
<u>X</u>	Uses resources wisely	<u>Is aware of budgets and how to use resources.</u>
<u>X</u>	Has good work attendance	<u>Sylvia maintains good attendance.</u>
<u>X</u>	Represents the agency well	<u>Sylvia strongly believes in the agency's mission.</u>
<u>X</u>	Is a loyal employee	<u>Sylvia promotes the agency and transit in a positive manner.</u>
<u>X</u>	Handles crisis well	<u>Sylvia goes on-site in cases of transit vehicle accidents.</u>
<u>X</u>	Goes above and beyond the call of duty	<u>Sylvia will do whatever it takes to make transit successful</u>
<u>X</u>	Works well with others (team player)	<u>Sylvia is a great team player.</u>



X	Is creative	Sylvia is my go to person when we need to put together displays or transit events.
X	Likes to learn new things	Sylvia is always ready to learn and share.
X	Is a good listener	Sylvia is a very good advocate for the drivers and for the public.
X	Communicates well	Sylvia is often my choice to represent transit on social media.
X	Dependable	Sylvia will meet assignments and complete tasks.
X	Respectful, considerate of others	Sylvia is genuinely respectful and considerate of other staff and the public.
X	Safety conscious	As the transit trainer, Sylvia is very safety conscious.
X	Good problem solving skills	I trust Sylvia to make good decisions.
	Other	
	Other	
	Other	

Use this space if you have anything additional that you would like to say about the person being nominated.

Sylvia is a long-term transit employee. She started as a driver and then moved up to dispatcher. She also performed billing and scheduling duties through our Sooner Ride contract services. She is now the full-time transit trainer. Through-out all of her time working in the transit program, Sylvia has shown an enthusiasm and genuine dedication to promoting the transit program and the agency as a whole. She truly believes in the agency's mission of "Helping People, Changing Lives." She is always willing to help with anything that needs to be done from taking out the trash, to driving a bus, to her current duties of training the drivers in all areas of safety and professionalism. I have full confidence that any time I call on Sylvia, she will be ready to help with a great attitude and a determination to make whatever she is doing beneficial for the program and the people we serve.

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.

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

Program Summary
Head Start/Early Head Start/Early Head Start-Child Care Programs
May 2024

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of April there were 46 children, age birth to 3, that were provided services in the Early Head Start centers and 108 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 293 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 April, we had 112 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 55 participants, with 6 of them being father figures.

Father Involvement

The dad's day activities for the month of April were various crafts based on Earth Day, a paper umbrella craft, and one Head Start center made paper flowers then used paper towel rolls to make flower vases. The flower arrangements were delivered to a local nursing home. There were also several family day activities during the month, and two Head Start centers held Trike-a-Thon's in order to raise money for St. Jude and provide the children an opportunity to learn about bike safety. For the April Dad's Day, there were 183 people that participated in dads day activities with 73 being father figures. In addition, 9 dads/father figures participated in parent meetings for April. Since the beginning of the 2023-2024 school year, we have had 1,012 father figures participate in family engagement activities.

Nutrition

In the month of May, the nutrition team has sent our HS and EHS/EHS-CC menus off to be reviewed by our dietician that we are in contract with. We have been making preparations for our upcoming EHS/EHS-CC Pre-Service, we have begun updating our cook binders for the new upcoming school year. We are continuing to make preparations for next school year.

Health

During the month of May employee physical tracking continued with reminder phone calls and emails to staff on past dues and upcoming. Health reports to Jordan Mack is provided on the 15th of each month. Two CPR classes were held. We continue to receive updates for Child Plus immunizations and Physicals received from centers for entry into Child Plus on a daily basis. EHS & ELC centers were called to let parents know about past due immunizations and/or physicals that are due. We ended the school year in head start with 92% of physical/dentals done! EHS & EHS/CC are doing well on getting and completing physicals/dentals.

Stay Healthy & wash your hands!

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 May, 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 May, 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, two children who have an IFSP and three others have been referred to Sooner Start through the online process.

In the EHS-Child Care program, there are two children that have been identified to receive Sooner Start services and five others are in the referral process.

In Head Start for the school year 2023-2024, fifty-eight students were evaluated and had an IEP and will received special education services from the staff/consultants from the public schools. 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 May our Head Start 4-year-olds completed transition visits to their next school setting.

Recruitment/Outreach

Radio Ad

Attention: Choctaw, McCurtain and Pushmataha Counties!

Summertime is almost here! Get a HEAD START on the 2024-2025 school year by submitting your application for PRE-SCHOOL, TODAY! This will ensure that you are on our waitlist for the upcoming 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, Battiest, 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

Monday Morning Memo

Information was sent out to all HS/EHS/CC staff on how they can help us meet full enrollment this summer. Encouraging them to like and share our Facebook posts, spread information through word of mouth and to speak positively regarding our programs.



Help Me Grow Newsletter



Pre-School Summer Activity Packs

These are available at our office for parents to come by and pick up for their children to have for the summer. It was advertised on Facebook. These were advertised on Facebook and provided at our LIFT Community Corral.



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.

Community Events

Fostering Hope: Community Connections Seminar:

- LIFT Tri-County Opioid Response Project hosted the event and provided HS/EHS/EHS-CC program information at their booth for all attendees to pick up.



RESERVE YOUR SEAT !!
Thursday, May 23 &
Friday May 24, 2024

Where
Kiamichi Technology Center
107 S 15th St Hugo, OK 74743

Sessions

- Tactical Communications for law enforcement
- Intro into autism spectrum disorder
- First Responders & their mental well being
- Beyond ACEs, Resiliency Really Does Matter/Near Science
- Ethics
- Trauma Training
- How Stress Affects Physical & Emotional Wellbeing

LIFT Community Corral:

- Our agency hosted a community event to celebrate 60 years of community action. We provided Parent Packets with information about our pre-school programs and promotional giveaways to all who visited our table.

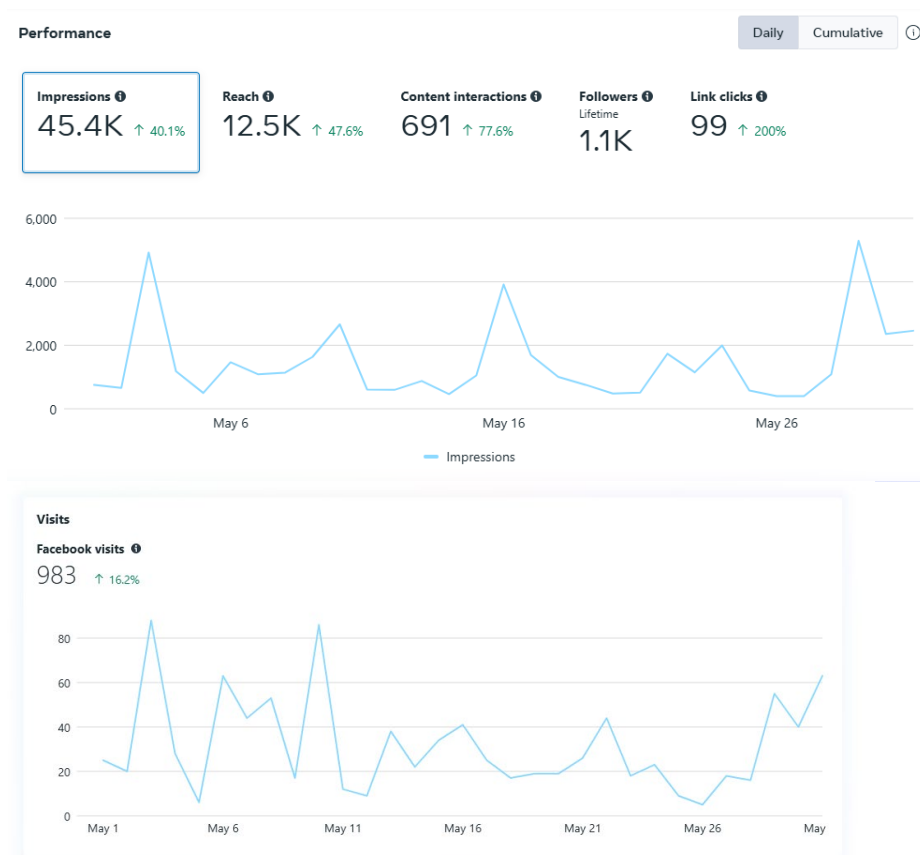


Hugo Homecoming Rodeo Parade:

- We participated in the annual parade. We threw out promotional materials with our information on each item.



Facebook Data Overall data for May:

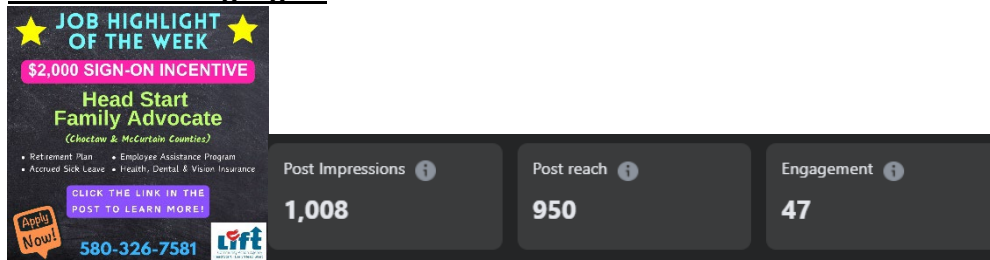


Pre-School Early Registration Event

- Officially launched on Facebook to promote the June event.



Facebook Job Highlights



★
★

JOB HIGHLIGHT OF THE WEEK

\$2,500 SIGN-ON INCENTIVE

Head Start Teacher

(This position is located in Valliant)

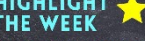
- Retirement Plan • Employee Assistance Program
- Accrued Sick Leave • Health, Dental & Vision Insurance

[CLICK THE LINK IN THE POST TO LEARN MORE!](#)

580-326-7581

Post Impressions ⓘ	Post reach ⓘ	Engagement ⓘ
1,387	1,295	72

JOB HIGHLIGHT OF THE WEEK \$2,000 SIGN-ON INCENTIVE Mentor Coach - Retirement Plan - Employee Assistance Program - Accrued Sick Leave - Health, Dental & Vision Insurance CLICK THE LINK IN THE POST TO LEARN MORE! Apply Now! 580-326-7581		Post Impressions ⓘ 1,790	Post reach ⓘ 1,698
		Engagement ⓘ 99	



JOB HIGHLIGHT OF THE WEEK

\$2,000 SIGN-ON INCENTIVE

HS/EHS/EHS-CC
Site Supervisor – Family Advocate
(This position is located in Kalamazoo)

- Retirement Plan
- Employee Assistance Program
- Accrued Sick Leave
- Health, Dental & Vision Insurance

CLICK THE LINK IN THE POST TO LEARN MORE!

580-326-7581



Post Impressions

2,547

Post reach

2,457

Engagement

385



WE ARE HIRING!

CHECK OUT OUR SIGN-ON INCENTIVES!

- \$1,900+ Head Start Cook – Voluntary
- \$1,900+ Head Start Cook – Broken Bow 2
- \$2,000 HS-EHS-ENSC Mentor Coach
- \$2,000 Head Start Teacher – Voluntary 1
- \$1,900 Head Start Teacher Assistant – Voluntary
- \$9,000 Early Head Start Caregiver – Mabel
- \$1,000 HS-EMS-EHS-CC Substitute Part-Time
- \$1,000 Head Start Special Needs Aide – Antlers
- \$1,200 Head Start Special Needs Aide – Hugo
- \$1,200 Head Start Special Needs Aide – Mabel
- \$1,200 Head Start Special Needs Aide – Mabel
- \$1,700 Head Start Special Needs Aide – Retama
- \$1,700 Head Start Special Needs Aide – Valliant
- \$1,700 HS-CC Special Needs Aide – Broken Bow
- \$1,900 Head Start Special Needs Aide – Haworth
- \$1,000 Head Start Special Needs Aide – Broken Bow
- \$2,000 HS-EHS-ENSC-CC Disabilities/Mental Health Specialist
- \$2,000 Head Start Family Advocate – Choctaw and McCurtain Counties

We are seeking motivated and dependable individuals who will provide warm and nurturing environment for our early learners to grow and thrive!

504.762.64.03X 76
401.718.1611
www.liftcpr.org



Post Impressions ⓘ

754

Post reach ⓘ

682

Engagement ⓘ

40







Celebrated our teacher's and support staff on Teacher Appreciation Day

Celebrating and recognizing our teachers and support staff shows the positive, fun and encouraging work environment our agency provides. In return, this helps increase the probability of receiving completed job applications for our available positions.

Celebrating National Teacher Day!

A special
THANK YOU
to our teachers &
support staff for
the love, hard work,
& dedication you
pour into your
children each &
every day!

Facebook Enrollment Posts



APPLY TODAY FOR PRE-SCHOOL

Submit Your Application for the 2024-2025 School Year!

AGES 3-4
NO COST TO FAMILIES
MEALS & SNACKS INCLUDED
ALL SCHOOL SUPPLIES PROVIDED

Post Impressions 

912

Post reach 

825

Engagement 

42

Do you receive Supplemental Nutrition Assistance Program benefits?



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

 **580-326-7581**
www.liftca.org

 **CHARTERED MEMBER**

PRE-SCHOOL
Ages 3-4
Quality education for early learners!

NO COST TO FAMILIES
All school supplies, meals and snacks are provided!

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



Antlers
Battiest
Boswell
Broken Bow
Clayton
Forest Grove
Fort Towson

Haworth
Hugo
Idabel
Rattan
Soper
Valliant
Fort Towson

Post Impressions 

1,050

Post reach 

980

Engagement 

37

Post Impressions 

352

Post reach 

349

Engagement 

13

Highlighting our Head Start and Early Head Start Activities

- Highlighting classroom activities helps bring parents and caregivers to our page, makes them aware of our program and shows the positive impact our program has on our children and families.

LIFT Head Start/Early Head Start
Published by Ashley Switzer Gaddy · May 6 at 7:00 AM

Transitioning to Kindergarten at Battiest Head Start

As part of their end of the year activities, Battiest Head Start had the opportunity to visit the Battiest Kindergarten classroom! They got to meet the teachers and play on the kindergarten playground.

🟢 Battiest Head Start is KINDERGARTEN-READY!



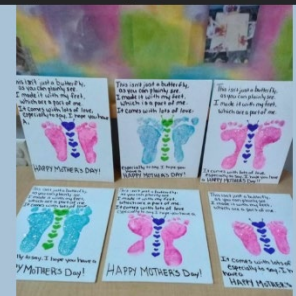

LIFT Head Start/Early Head Start
Published by Ashley Switzer Gaddy · May 6 at 8:00 AM

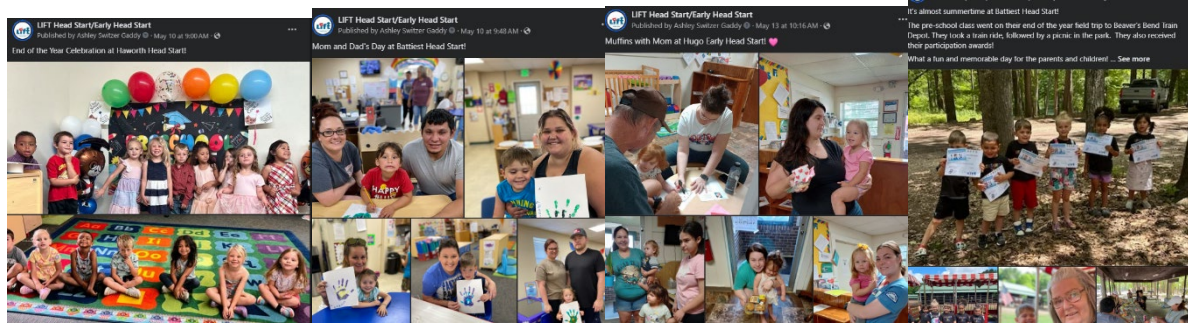
~Presenting the 2024 graduating class of Clayton Head Start~
Kindergarten-ready! 🟢



LIFT Head Start/Early Head Start
Published by Ashley Switzer Gaddy · May 13 at 8:00 AM

Celebrating Mother's Day at Antlers Early Learning Center!
What a special and memorable keepsake! ❤️







Explore content posted to the [Early Childhood Learning and Knowledge Center \(ECLKC\)](#) throughout the month of May. 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

- [ACF-OHS-IM-24-01 Strategies and Recommendations for Supporting Mental Health](#)
 - Available in [Spanish \(español\)](#)
- [ACF-OHS-PI-24-03 New Eligibility Provisions for American Indian and Alaska Native Programs](#)
 - Available in [Spanish \(español\)](#)
- [ACF-OHS-PI-24-04 New Eligibility Provisions for Migrant and Seasonal Head Start Programs](#)
 - Available in [Spanish \(español\)](#)
- [Biden-Harris Administration Recognized Early Educators During Care Week 2024](#) (email)
- [Celebrate OHS's 59th Birthday with Director Garvin](#) (email)
 - Available in [Spanish \(español\)](#)
- [Director Garvin Introduces the Tribal Request for Information](#) (email)
- [Financing for Early Childhood Education Quality and Access for All \(F4EQ\) Survey](#) (email)
- [Home at Head Start with Director Garvin: Our Language Matters](#) (video)
- [How to Provide Feedback and Suggestions to OHS on the ECLKC](#) (video)
- [Q&A Fireside Chat with Director Khari M. Garvin](#) (video)
- [Strategies to Promote the Mental Health and Well-being of Children, Families, and the Early Care and Education Workforce](#) (email)
- [Children's Mental Health Awareness Day](#) (video)
- [Supporting the Head Start Workforce](#) (email)
- [Teacher Appreciation Week](#) (vlog)
- [Workforce Roundtable with Head Start Staff and HHS Leadership](#) (video)

Training and Technical Assistance Resources

Health, Behavioral Health, and Safety

- [Active Supervision Posters](#)
- [Chronic Health Conditions](#)
- [Head Start Programs, Indigenous Families, and Addiction](#) (email)
- [Health Literacy Toolkit for Early Childhood Programs](#) (email)
 - Available in [Spanish \(español\)](#)
- [Health Needs of Children Facing Rural Homelessness](#) (email)
 - Available in [Spanish \(español\)](#)
- [Improving Children's Access to Nutritious Food in Summer](#) (email)
 - Available in [Spanish \(español\)](#)
- [Integrating Health, Behavioral Health, and Safety in Emergencies](#) (email)
- Mental Health Mondays (emails)
 - [May 6](#)
 - Available in [Spanish \(español\)](#)
 - [May 13](#)
 - Available in [Spanish \(español\)](#)
 - [May 20](#)
 - Available in [Spanish \(español\)](#)
 - [May 27](#)

- Available in [Spanish \(español\)](#)
- [Nutrition Services Are a Health Equity Intervention](#) (email)
- [Trauma and Adverse Childhood Experiences](#) (email)
 - Available in [Spanish \(español\)](#)
- [Vision Screening for Young Children](#)
 - [Vision Screening Referrals](#)
 - [Optotype-based Vision Screening](#)
- [4 Steps to Healthy and Safe Learning Environments](#) (video)

Program Management and Fiscal Operations

- [Key Considerations for Tailoring Recruitment Strategies](#) (video)

Newsletters

- [Disabilities Services Newsletter Issue No. 79](#)
- [Play the Head Start Way Newsletter Issue No. 1](#)
- [Resources to Make You Smile! Issue No. 39](#)
 - Available in [Spanish \(español\)](#)
- [Sesame Street in Communities Issue No. 32](#)
 - Available in [Spanish \(español\)](#)

[Subscribe now](#) to get all your favorite newsletters direct to your inbox.

Head Start Careers

- [Center Director](#) Moundville, AL
- [Health and Nutrition Coordinator](#) Charlottesville, VA
- [Site Supervisor](#) Ventura County, CA

Find more [Head Start program employment opportunities](#) in the ECLKC Job Center.

Upcoming Events for June

- Wednesday, June 5: [Best Practices and Effective Strategies for Connecting Head Start Programs with Refugee Communities](#) (NHSA event)
- Monday, June 10
 - [MyPeers Orientation](#)
 - [OHS Tribal RFI Listening Session for Head Start Teachers, Program Staff, and Families](#)
- Wednesday, June 12: [Difficult Conversations During Coaching \[in Spanish\]](#)
- Monday, June 17–28: [PMFO–UCLA Head Start Management Fellows Program](#)
- Monday, June 17: [New Head Start Eligibility for Children in Tribal Programs](#)
- Thursday, June 20
 - [Between the Bread: Nutrition Packed Sandwiches](#)
 - [Helping Children, Families, and Communities Cope with Grief](#)
 - [New Head Start Eligibility for Children in Agricultural Programs](#)
 - [Resources and Tools to Advance Equity in Head Start Programs](#)
- Friday, June 21: [Creative and Playful Learning in Family Child Care](#)
- Monday, June 24–26: [National Research Conference on Early Childhood \(NRCEC\) 2024](#)
- Monday, June 24
 - [Infant and Early Childhood Mental Health Consultation National Office Hours](#)
 - [The Data Literacy Credential](#) (NHSA event)
- Thursday, June 27: [MyPeers Orientation](#)

Visit the ECLKC for a full list of [upcoming events](#).

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
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
April-24	3161	3175	4218	10554
May-24	2115	2072	2416	6603
YEARLY TOTALS	27119	27113	34039	88,271

April 2024 HEAD START TIME & ATTENDANCE REPORT													
As of 4/30/24	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	2	18	3		3	15	0		15		16	92.2%
Antlers 2			0			0	0	0		0			
Battiest	10		10	2		2	8	0		8	4	16	86.7%
Boswell 1	11		11	2		2	9	0		9	4	16	95.8%
Boswell 2	11		11	6		6	5	0		5	3	16	96.3%
Broken Bow 1	20		20	3		3	17	0		17		16	90.1%
Broken Bow 3	14	2	16	2		2	14	0		14		16	82.6%
Clayton 1	16		16	2		2	14	0		14	3	18	86.1%
Clayton 2	10		10	1		1	9	0		9	2	18	92.6%
Forest Grove 1	13		13	2		2	11	0		11	6	16	73.9%
Forest Grove 2	19		19	2		2	17	0		17	8	16	84.2%
Fort Towson	12		12	4		4	8	0		8	4	15	79.2%
Haworth	13		13	2		2	11	0		11	2	16	86.9%
Horace Mann 1	13		13	1		1	12	0		12		18	91.2%
Horace Mann 2	14	1	15	1		1	14	0		14	4	18	88.8%
Horace Mann 3	15		15	2		2	13	0		13		18	88.0%
Hugo 2	8	2	10	1		1	9	0		9		18	90.0%
Hugo 4	10		10	2	1	3	7	1	4/25/2024	8	1	18	81.9%
Idabel 1	12		12	1		1	11	0		11		19	74.2%
Idabel 2	11		11	2		2	9	0		9		19	76.3%
Idabel 3	17		17	5		5	12	0		12		19	91.2%
Rattan 1	15	1	16	2		2	14	0		14	4	16	93.2%
Rattan 2	3		3			0	3	0		3	3	18	96.3%
Rattan 3	8		8	2		2	6	0		6	2	18	95.4%
Soper 1	16		16	3		3	13	0		13	5	22	93.7%
Soper 2	22		22	3		3	19	0		19	10	22	94.0%
Valliant 1			0			0	0	0		0			
Valliant 2	16	1	17	3		3	14	0		14		16	85.7%
TOTALS	345	9	354	59	1	60	294	1		295	65		87.9%

April 2024 Pre-K TIME & ATTENDANCE REPORT

As of 4/30/24	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	85.4%
Broken Bow 3			0			0	0		
Clayton 2			0			0	0		
Forest Grove 1			0			0	0		
Fort Towson			0			0	0		
Horace Mann 2			0			0	0		
Hugo 2			0			0	0		
Hugo 4			0			0	0		
Rattan 2			0			0	0		
Rattan 3			0			0	0		
Soper 2			0			0	0		
TOTALS	4	0	4	1	0	1	3		85.4%

April 2024 EHS Time and Attendance												
As of 4/30/24	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	59	2	61	37		37	24	1	0		20	83.8%
Hugo	31	1	32	20		20	12	1	0		20	85.3%
Idabel	33		33	22		22	11	2	0		20	79.1%
TOTALS	123	3	126	79	0	79	47	4	0			83.1%

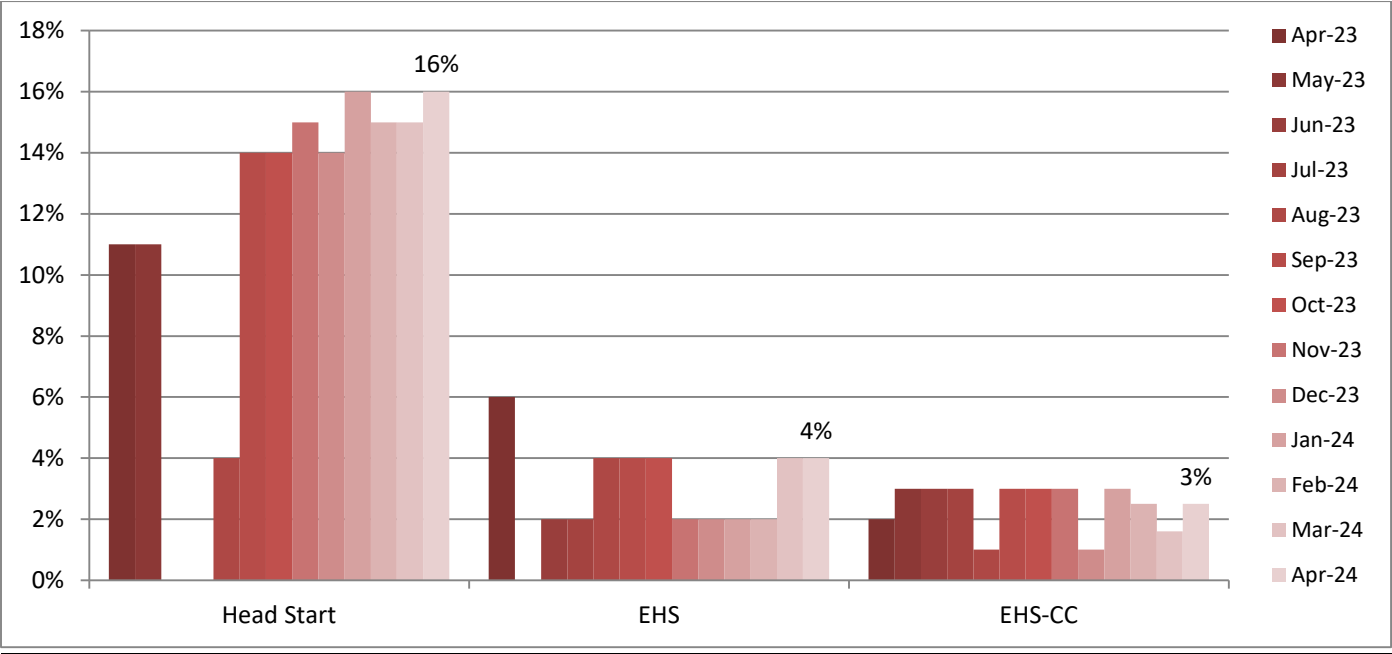
April 2024 EHS-CC Time and Attendance												
As of 4/30/24	ENROLLED			DROPPED								ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Dropped	Monthly Drop	YTD Drop	Currently Enrolled	AI	30 Day Count	Date Dropped	Kid Days	Monthly ADA
ELC-Antlers	21		21	13		13	8		0		20	75.6%
ELC-Broken Bow	48		48	32	2	34	14	1	2	4/19/2024	20	83.1%
ELC-Hugo	19		19	11	1	12	7		1	4/29/2024	20	75.5%
ELC-Idabel	43		43	27		27	16	3	0		20	81.6%
Cabbage Patch	46		46	22	1	23	23	4	1	4/26/2024	21	94.0%
The LearningTree	83	5	88	47	4	51	37	1	4	4/16/2024	20	84.0%
TOTALS	260	5	265	152	8	160	105	9	8			84.6%

Data Analysis Report Summary

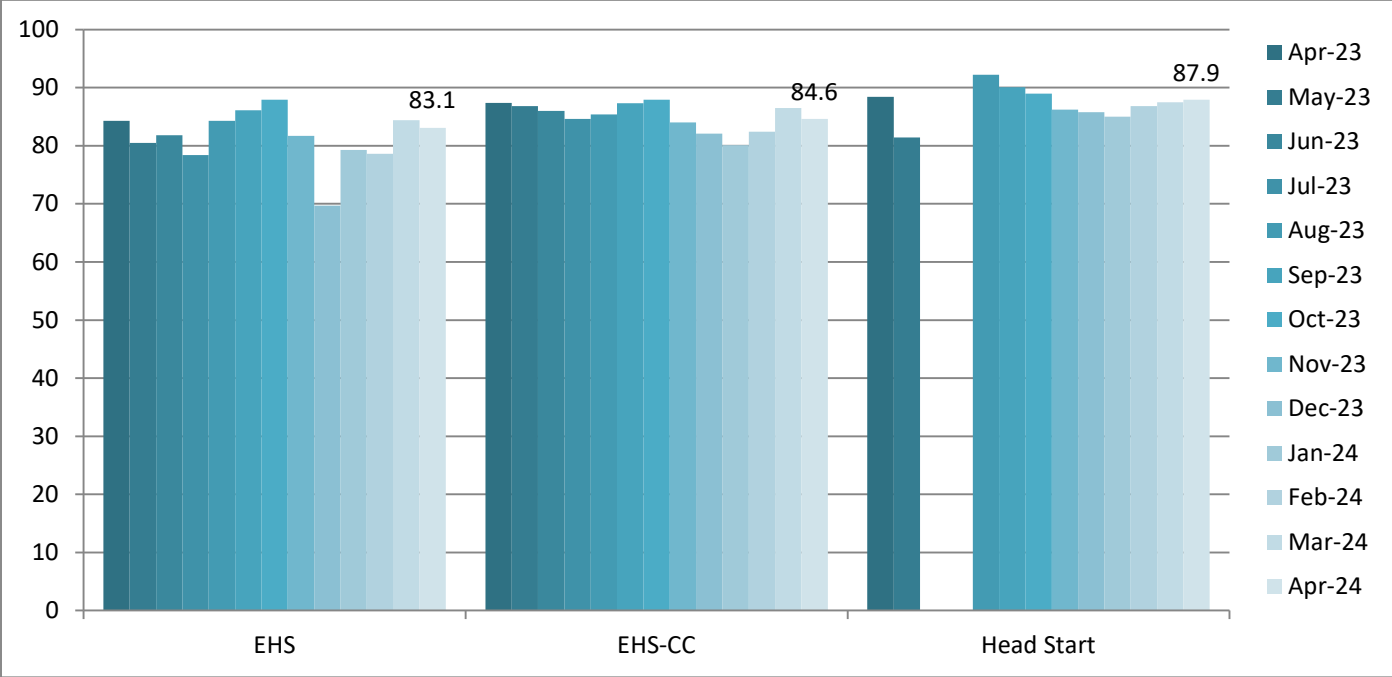
April 2024

Disabilities

IEP/IFSP –

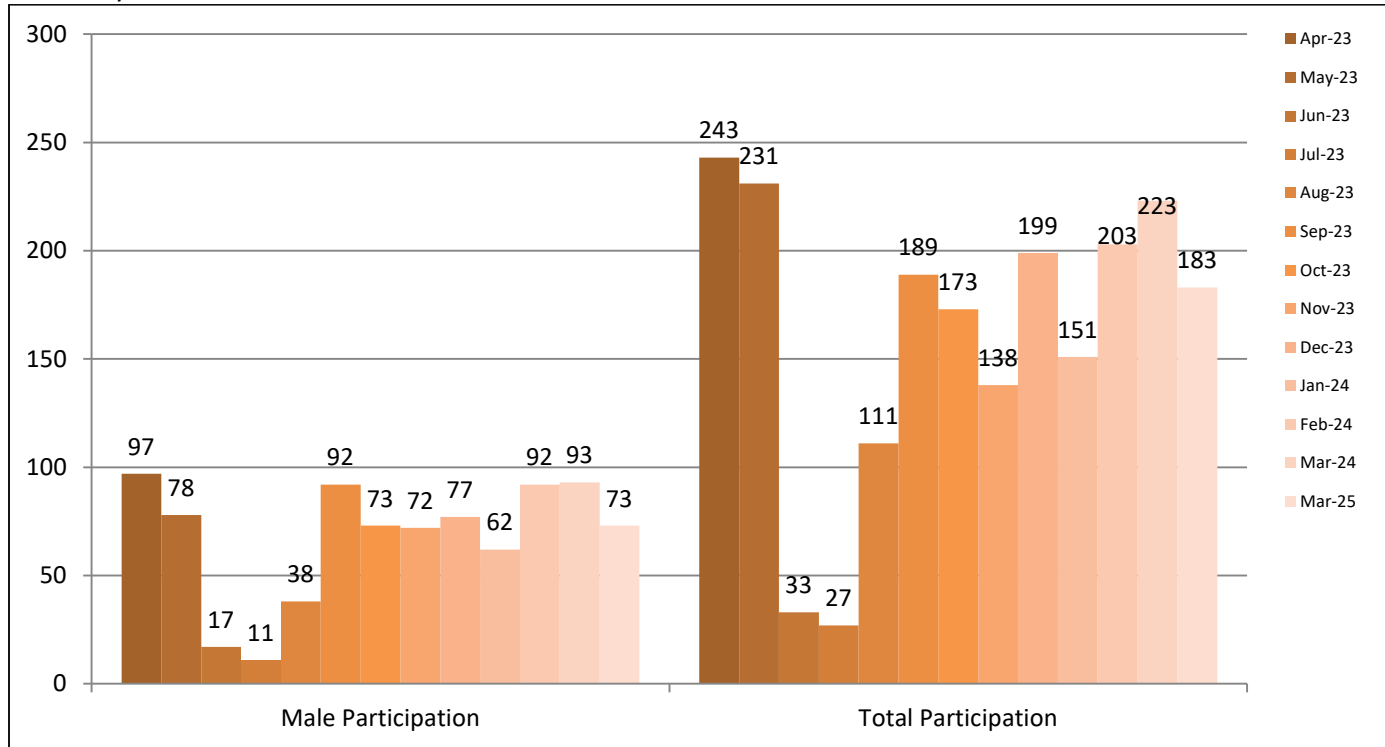


Attendance

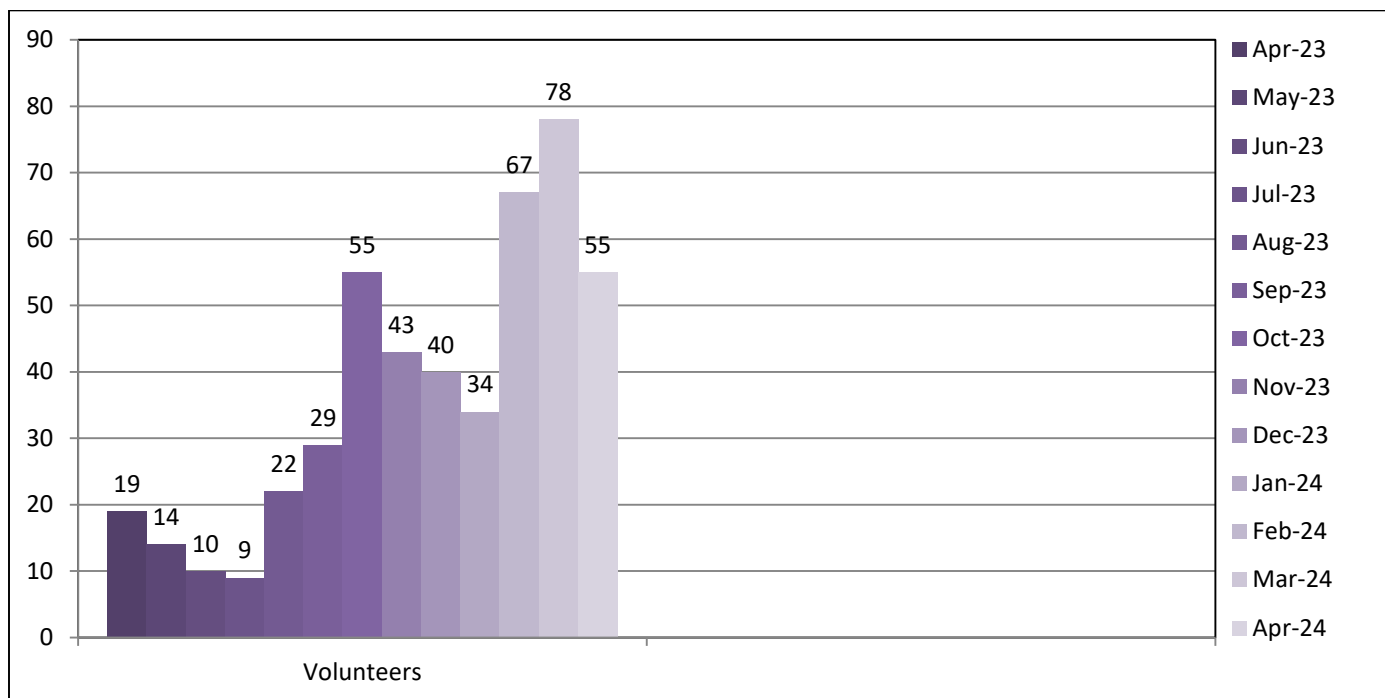


Family & Community Engagement

Dad's Day



Parents Ready to Read



From: Blan, Meagan <Meagan.Blan@dac.state.ok.us>
Sent: Tuesday, May 21, 2024 12:20 PM
Cc: Hendrix, Brian <Brian.Hendrix@dac.state.ok.us>; Heath, Misty <Misty.Heath@dac.state.ok.us>;
Cottrell, Natasha <Natasha.Cottrell@dac.state.ok.us>
Subject: VOCA Assistance Funding Reduction

Greetings,

Back in January, our VOCA Team forwarded a message to each of you from the National Association of Victims Assistance Administrators (NAVAA) that referenced a possible 41% decrease in funding for Victim Assistance Formula Grants this year. Regretfully, I am writing to tell you that the prediction is now reality. Included in numbers released a few weeks ago by OVC, the Oklahoma VOCA formula grant allocation is \$9,507,530.

I share this information with you for a few reasons. First, this is unlike last year when we were told and in turn told you to prepare for significant decreases that did not take place. Second, this year will be an extremely challenging year as our team and the VOCA Board evaluates requests and recommends funding. Finally, the VOCA Team and the VOCA Board are mindful of the impact the massive cut to funding will have on you as direct service providers. Consequently, we will strive to disburse these funds in a way that insures a diversity of services to victims in all parts of the state.

Respectfully,

Brian Hendrix

Director of Victims Services
District Attorneys Council
421 NW 13th, Suite 290
Oklahoma City, OK 73103
405-264-5042 (office)
405-264-5097 (fax)
1-800-745-6098 (toll-free)

Justice, Integrity, Service



LIFT Community Action Agency, Inc

A NeighborWorks® Organization FY 2023

LIFT Community Action Agency improves the lives of low-income individuals and families through service and collaboration, leading to self-sufficiency. LIFT Community Action Agency's vision is to free generations of people from poverty.

Our Impact

\$51,246,565
Total private, philanthropic,
and public investment

131

Homeowners Created
and/or Preserved

112

For Sale and For Rent
Homes Developed

11

Total Repaired
Homes

126

Rental Portfolio (Owned
and/or Managed)

\$245,750

Grants from
NeighborWorks America

209:1

Investment per Dollar of
NeighborWorks America
Grant Funding

251.5

Full Time Staff

316

Jobs Created and/
or Maintained



www.NeighborWorks.org