



LIFT

Community Action Agency, Inc.

Board of Directors Meeting

NOVEMBER 12, 2024 • 10:00 AM
HEAD START ADMINISTRATION OFFICE
1005 S. 5TH STREET - HUGO, OKLAHOMA

Our Mission:

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

Board of Directors and/or Executive Committee Meeting
LIFT Community Action Agency, Inc.
Tuesday, November 12, 2024 · 10:00 a.m.
Head Start Administration Office · 1005 S. 5th Street · Hugo, Oklahoma · 74743

AGENDA

- A.** Call to Order and Invocation
- B.** Opening of Board Meeting – Roll Call, Declaration of Quorum, and Introduction of Guests
- C.** Finance/Audit/Loan Committee Report

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unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.*

- D.** Consideration, Discussion, and Vote to Approve October 2024 Regular Meeting Minutes (*Organizational Standard 5.5*)
- E.** Consideration, Discussion, and Vote to Approve September 2024 Financial Reports; Distribution of October 2024 Financials for December 2024 Consideration and Vote (*OS 8.7*)
- F.** Consider Submission of Resolutions/Grant Applications, Vote to Approve – **\$11,376**
 - 1. Spark Good Local Grant Application to Walmart (Facility 38, Idabel) - **\$5,000**
 - 2. Spark Good Local Grant Application to Walmart (Facility 117, Broken Bow) - **\$5,000**
 - 3. FY 2024 Community Services Block Grant Application (6th Allocation) to Oklahoma Department of Commerce/Community Development - **\$1,376**
- G.** Consider Acceptance of Grants/Contracts/Awards, Vote to Approve – **\$1,413,267.34**
 - 1. FY 2025 Base Grant Award from Oklahoma Court Appointed Special Advocates (CASA) Association - **\$27,459.10**
 - 2. Child and Adult Care Food Program Award (Early Learning Centers) from Oklahoma Department of Education - **\$118,865.24**
 - 3. Spark Good Local Grant Award from Walmart (Facility 49, Hugo) - **\$1,500**
 - 4. Round Up Change Program Donation (CASA) from Kwik Chek/McCraw Oil Company Incorporated - **\$2,500**
 - 5. FY 2024 Community Services Block Grant Award (6th Allocation) from Oklahoma Department of Commerce/Community Development - **\$1,376** (*Total Awarded: \$238,085*)
 - 6. CACFP Award (Head Start/Early Head Start) from Oklahoma Dept. of Education - **\$688,050**
 - 7. Spark Good Local Grant Award from Walmart (Facility 117, Broken Bow) - **\$1,000**
 - 8. Section 5311 – Formula Grants for Rural Areas and Rural Transit Assistance Program Awards from Oklahoma Dept. of Transportation - **\$437,061** (*Section 5311: \$432,061, RTAP: \$5,000*)
 - 9. Community Event Grant Award from Potts Family Foundation - **\$500**
 - 10. Public Transit Revolving Fund Award from ODOT - **\$134,956**
- H.** Consideration, Discussion, and Vote to Approve Submission of FY 2024 Carryover Application and Non-Federal Share Waiver Request for the Early Head Start-Child Care Program

- I. Consideration, Discussion, and Vote to Approve 2025 Agency-Wide Budget (OS 8.9)
- J. Consideration, Discussion, and Vote to Approve LIFT CAA Succession Plan (OS 4.5)
- K. Consideration, Discussion, and Vote to Approve LIFT CAA to Act as Fiscal Agent for the Choctaw County Freestanding Multidisciplinary Team and Contract with Oklahoma Commission on Children and Youth (\$34,267.90 Maximum Contract Total, Period: 1/1/2025–12/31/2025)
- L. Consideration, Discussion, and Vote to Approve LIFT CAA to Act as Fiscal Agent for the Pushmataha County Freestanding Multidisciplinary Team and Contract with Oklahoma Comm. on Children and Youth (\$34,267.90 Maximum Contract Total, Period: 1/1/2025–12/31/2025)
- M. Board Training: Civil Rights Training for Grantees (OS 5.7)
- N. Board Training/Programmatic Report: Update on ROMA Process, 2024 Community Action Plan with Logic Models/Results & 2023-25 Strategic Plan: Agency Program/Performance Evaluation, Success of Specific Strategies, Progress on Meeting Goals (OS 4.2, 4.3, 4.4, 5.7, 5.9 & 6.5)
- O. Board Training/Programmatic Report: Quarterly (July-September) and Year-to-Date Housing Production as Reported to NeighborWorks® America (OS 5.7 & 5.9)
- P. Board Giving Report (OS 5.7)
- Q. Policy Council Report (OS 2.1 & 5.9)
- R. Recognition of November 2024 Employee of the Month:
Owyne Gardner, Program Director – Technical and Management Assistance Program
- S. Other Reports/Announcements/Correspondence: HS/EHS/EHS-Child Care Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Grants to Prevent and Respond to Domestic Violence, Dating Violence, Sexual Assault, and Stalking Against Children and Youth Program No-Cost Extension Approval; Family Resource Center Resource Drive; AmeriCorps Seniors Retired and Senior Volunteer Program Recognition Events (OS 5.9)
- T. 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*)
- U. Consideration, Discussion, and Vote to Adjourn

Posted: _____ Date: _____ Time: _____

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

MINUTES
BOARD OF DIRECTORS MEETING
October 8, 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, October 8, 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 Andrea Henkel.

Roll Call was taken and a quorum was established (17 Board Members present, 9 absent). The following Board Members were present at the meeting site: Tami Barnes, Brad Burgett, Brent Franks, David Hawkins, Andrea Henkel, Jia Johnson, Sharon Johnson, Vickie Leathers, Sandra Meeks, David Smith, William Smith, Consuelo Splawn, Jim Bob Sullivan, Leah Thomas, Vicky Wade, Debra Williams, and Craig Young. The following members were absent: Tiffany Brockway, Colby Bryant, Kevin Cory, Kristi Graham, Patsy Guess, Jordan Hill, Jeffery Lucas, Kara Maness, and Carolyn Pool. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Rhonda Teague, Macy Self, Sheree Ensley, Darla Galyon, Jeannie McMillin, Rebecca (Reynolds) Porter, W.F. Grammar, Mattie McKee, Kathy James, Jordan Mack, Brandon McDaniel, Amber Garman, Nathaniel Pickard, and Sommer Springfield.

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.

Sheree Ensley, Fiscal Officer, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on October 8, 2024 at 9:10 a.m. The Committee received a status report on all active loans; there were no new loan applications to present. The Committee voted to recommend full Board approval of the agency's Financial Reports for August 2024 and was presented with the September 2024 Financial Reports. The Committee received property updates concerning cabin remodels at Hugo Lake and sale proceedings for the Transit Building in Antlers.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the September 2024 Regular Meeting Minutes and the August 2024 Financial Reports;

the September 2024 Financials were distributed for consideration and vote at the November 2024 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Tami Barnes and seconded by Andrea Henkel to approve the September 2024 Regular Meeting Minutes and the August 2024 Financial Reports. The roll call vote was as follows: Yes 14; No 0; Abstain 2. The motion carried. The Voting Record is attached (Items D & E).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

1. Community Event Grant Application to Potts Family Foundation in the amount of \$500; if awarded, these funds will be used to cover the cost of providing refreshments during the Family Resource Center Kick-off Event held in September.
2. Transportation Services Contract Bid to Oklahoma Department of Human Services in the amount of \$1,385,224; if awarded, these funds will be used for the provision of transportation services for Temporary Assistance for Needy Families (TANF) participants and Work Ready participants with a minor child, for the purpose of reporting to designated training, educational, treatment, or work sites in Choctaw, McCurtain, and Pushmataha Counties.
3. Spark Good Local Grant Application to Walmart (Facility 49) in the amount of \$5,000; if awarded, these funds will be used for operational expenses of the AmeriCorps Seniors Retired and Senior Volunteer Program.
4. HOME Investment Partnerships Program Grant Applications to Oklahoma Housing Finance Agency in the amount of \$704,586 (Rental New Construction: \$654,586, Community Housing Development Organization Operating: \$50,000); if awarded, these funds would be used to construct one duplex apartment building in Hugo, Oklahoma (total cost of \$654,586), as well as provide CHDO operating support in the amount of \$50,000 for staff salaries, travel and administrative costs associated with the construction of the rental new construction units.
5. Section 5339(a) – Bus and Bus Facilities Program Application to Oklahoma Department of Transportation in the amount of \$391,023; if awarded, this funding will be used to purchase four new vehicles (seven-passenger center aisle buses) in order to replace existing high-mileage vehicles within the active LIFT Transit fleet. The program will also utilize local match funds in the amount of \$69,004 to support the purchase of the vehicles.

After discussion and Board Member input with regards to the applications presented, a motion was made by Brad Burgett and seconded by Debra Williams to approve the submission of resolutions and/or grant applications in the amount of \$2,486,333 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item F).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

1. FY 2024 Community Services Block Grant Award (1% Increase) from Oklahoma Department of Commerce/Community Development in the amount of \$2,286; these funds will be used for the purpose of revitalizing communities and the creation of opportunities for economic prosperity among low-income individuals and families. The total amount awarded for FY 2024 is \$236,709.
2. Signature Cause Award (Holiday Food Baskets) from International Paper Foundation in the amount of \$2,381; this funding will be leveraged with LIFT CAA non-federal funds

and used to provide food baskets to needy families in the tri-county service area during the 2024 Thanksgiving and Christmas holiday seasons.

3. SFY 2025 Community Action Agencies State Appropriated Funds Award (Head Start) from ODOC in the amount of \$91,962; these funds will be used to offset Head Start/Early Head Start Teacher salaries and fringe benefits, and support a portion of the salaries/fringe benefits for Family Advocates who work with the programs.
4. Child and Adult Care Food Program Award from Oklahoma Department of Education in the amount of \$1,254,551.25; of this total, funding for Program Operations (\$174,551.25) will be used for training daycare home providers, site visits to monitor and assist these providers, and other operational needs of the program. In addition, up to \$1,080,000 will be used for food reimbursement claims filed by the participating daycare home providers. LIFT CAA's CACFP program works with daycare home providers within 37 Oklahoma counties. These providers are reimbursed for meals being served to more than 3,000 children daily. The contract agreement period for the program will be October 1, 2024 through September 30, 2025.

A motion was made by Jim Bob Sullivan and seconded by Tami Barnes to approve acceptance of grants, contracts, and awards in the amount of \$1,351,180.25 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item G).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to enter into Executive Session to review and discuss the following items in accordance with Oklahoma Statute Title 25 § 307(B)(1): 1.) Executive and Personnel Committee's Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director (Organizational Standard 7.4) and 2.) Employment Contract Renewal and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA (Organizational Standard 7.5). A motion was made by William Smith and seconded by Brent Franks to enter into Executive Session to review and discuss the Executive and Personnel Committee's Performance Evaluation, Employment Contract Renewal, and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H). LIFT CAA staff/visitors then exited the room; the Board of Directors entered into Executive Session at 10:13 a.m.

After holding Executive Session, LIFT CAA staff/visitors were brought back into the meeting room. David Hawkins, Chairman, then requested the Board's consideration, discussion, and vote to adjourn out of Executive Session and the regular Board Meeting be reconvened. A motion was made by David Smith and seconded by William Smith to adjourn out of Executive Session and the regular Board Meeting be reconvened. The Roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I). The Board of Directors adjourned out of Executive Session at 11:00 a.m.

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. In accordance with Organizational Standards – Category 7, Standard 7.4, the Governing Board conducts a performance appraisal of the Executive Director each calendar year. The

Executive and Personnel Committee conduct the Performance Evaluation with the Executive Director present, then reports back to the Board on its findings. The Board reviews the Performance Evaluation, meets with the Executive Director if deemed necessary, and votes whether to approve the Evaluation. During Executive Session, the Board reviewed and discussed Executive Director Rebecca (Reynolds) Porter's Performance Evaluation. A motion was made by Brad Burgett and seconded by William Smith to approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item J).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the Renewal of Contract, Employment, and Compensation of Rebecca (Reynolds) Porter as LIFT CAA Executive Director. In accordance with Organizational Standards – Category 7, Standard 7.5, the Governing Board reviews and approves the Executive Director's compensation each calendar year. During Executive Session, the Board reviewed Reynolds' compensation, which is tied to the renewal of the contract and employment approval, and which was also discussed. A motion was made by Brent Franks and seconded by Brad Burgett to approve the Renewal of Contract and Employment of Rebecca (Reynolds) Porter as LIFT CAA Executive Director, along with approval of her Compensation as discussed by the Board in Executive Session. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item K).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration, discussion, and vote to approve the LIFT CAA Board of Directors Regular Meeting Dates for 2025 (Organizational Standard 5.5). All Regular Meetings of the Board of Directors will be held at 10:00 a.m. on the second Tuesday of each month at LIFT CAA's Head Start Administration Office, located at 1005 S. 5th Street in Hugo, Oklahoma. Porter noted that only 11 meetings are planned for 2025. She explained that there would not be a meeting held in November 2025 as the second Tuesday of that month would fall on Veterans Day, which is a Federal holiday and as a result, the agency will be closed. A motion was made by David Smith and seconded by William Smith to approve the LIFT CAA Board of Directors Regular Meeting Dates for 2025. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item L).

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, requested the Board's consideration, discussion, and vote to approve the Head Start/Early Head Start/Early Head Start-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy. The Policy Council Operating Procedures and Conflict Resolution/Impasse Policy reflect Federal requirements contained in the Head Start Program Performance Standards. These documents are reviewed (with changes made as needed) and approved by the Board of Directors and Policy Council annually. No changes are being proposed. A motion was made by Andrea Henkel and seconded by Brent Franks to approve the Head Start/Early Head Start/Early Head Start-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy. The roll call vote was: Yes 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 Program Director, provided a Board Training/Programmatic Report over the Head Start, Early Head Start, and Early Head Start-

Child Care Program Information Reports for 2023-2024 (Organizational Standards 5.7 and 5.9). A Program Information Report is required to be conducted annually for all Head Start and Early Head Start programs. The reports cover a range of topics from teacher qualifications to family needs to enrollment. These reports are used on a National level to survey programs and evaluate operations. Galyon provided a summary overview of each report and their use as a continuous quality improvement/assessment tool, then facilitated discussion with the Board concerning the reports.

Kinsey Cox, Administrative Assistant/CSBG Administrator/Public Relations Specialist, provided the Board with an update on the Community Needs Assessment (Organizational Standards 1.2, 2.2, 3.1, 3.2 and 3.3). The Community Needs Assessment is used to inform LIFT CAA's Strategic Plan and Community Action Plan, to help ensure the agency and its programs are addressing the needs of the service area. The existing Community Needs Assessment will expire in December of 2024; as such, the agency is currently engaged in conducting a new assessment. During the Board Meeting in June 2024, Board Members each completed the Community Needs Assessment survey. That input, along with survey responses from agency clients, staff, partners, and a range of other community members (educational, faith-based, public, private sector, etc.), were used to determine the area's top needs. From these 337 survey responses, the top 10 community needs identified were as follows: 1.) Housing, 2.) Early Childhood, 3.) Health Services, 4.) Youth Services, 5.) Emergency Services, 6.) Transportation, 7.) Substance Abuse Services, 8.) Senior Services, 9.) Economic/Community Development, and 10.) Nutrition. As part of the next step in the process, Board Members were then asked to prioritize these results, by each choosing the top three most pressing needs within their community and recording the reasoning behind their choices.

Kinsey Cox, Administrative Assistant/CSBG Administrator/Public Relations Specialist, presented the 2024 Customer Satisfaction Report for the 3rd Quarter (July – September) in accordance with CSBG Organizational Standard 1.3. The Customer Satisfaction Surveys are designed to allow customers an outlet for providing feedback. The Customer Satisfaction Surveys are completed by clients after having inquired about or received a service through an agency-operated program. LIFT CAA analyzes these survey responses as an additional tool to determine overall effectiveness of programs. During the 3rd Quarter, a total of 45 surveys were collected. Of those, 71% were from Choctaw County, 20% from Pushmataha County, 7% from McCurtain County, and 2% from other counties served. The programs represented during the 3rd Quarter included Emergency Assistance, Apartments, and Weatherization. Of those responding, 100% were satisfied with regards to satisfaction level for agency services received.

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

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided the Board with the Policy Council Report for the September 17, 2024 meeting (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized Sommer Springfield (Assistant Early Childhood Development and Curriculum Coach, Head Start/Early Head Start/EHS-Child Care Programs) as the October 2024 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized the following Service Award recipients: Five Years – Rylie Clark (Caregiver, Early Learning Centers), Kenesha Coleman (Transit Clerk, Transit Program) and Nathaniel Pickard (Human Resources/Benefit Specialist, Administration).

Other Reports/Announcements/Correspondence were presented as follows: Head Start/Early Head Start/EHS-Child Care Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Rural Sexual Assault, Domestic Violence, Dating Violence, and Stalking Program Grant No-Cost Extension Approval; Head Start Awareness Month; Domestic Violence Awareness Month; Ted Allen Memorial Awardee – Johnny Driggers; and LIFT Family Resource Center Kick-off Event Report (Organizational Standard 5.9).

There being no other business to come before the Board, a motion was made by Brad Burgett and seconded by Jim Bob Sullivan to adjourn the regular meeting. The roll call vote was as follows: Yes 15; No 0; Abstain 0. The motion carried. Voting record is attached (Item W).

The Regular Meeting adjourned at 11:34 a.m.

Brad Burgett, Secretary/Treasurer

CALL
To
ORDER:
10:04
am

	October 8, 2024	Present	Absent	D & E			F			G			H			I		
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes	✓		✓			✓			✓			✓			✓		
2	Tiffany Brockway		✓															
3	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																		

①

10:13
am

11:00
am

T. BARNES

A. HENKEL

B. BURGETT

D. WILLIAMS

J.B. SULLIVAN

T. BARNES

W. SMITH

B. FRANKS

D. SMITH

W. SMITH

	October 8, 2024	Present	Absent	J			K			L			M			W		
				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																		

ADJURN:
11:34 am

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

FINANCIAL ROW	AMOUNT (AS OF OCT 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	\$8,936,557.57	\$9,869,414.41	(\$932,856.84)	-9.45%
1020 - Payroll Account	\$397,685.75	\$363,621.18	\$34,064.57	9.37%
1021 - First United Accounts Payable	(\$13,117.61)	(\$34,318.47)	\$21,200.86	-61.78%
1022 - First United TH Reserve	\$145,617.74	\$139,439.77	\$6,177.97	4.43%
1023 - First United General Escrow	\$152,490.15	\$159,540.20	(\$7,050.05)	-4.42%
1024 - First United Marina License	\$253.84	\$240.82	\$13.02	5.41%
1025 - First United Deposit (PayPal)	\$2,115.20	\$2,115.20	\$0.00	0.00%
1028 - First United Unrestricted Funds CD	\$844,992.78	\$822,783.89	\$22,208.89	2.70%
1030 - Shamrock Bank - Clayton	\$1,851.01	\$1,835.61	\$15.40	0.84%
1040 - Petty Cash	\$860.00	\$410.00	\$450.00	109.76%
1050 - McCurtain County National Bank	\$29,942.41	\$17,224.53	\$12,717.88	73.84%
1070 - Fund to Fund Allocation Transfers	(\$60,573.17)	\$0.00	(\$60,573.17)	0.00%
Total - 1000 - Cash	\$10,438,675.67	\$11,342,307.14	(\$903,631.47)	-7.97%
Total Bank	\$10,438,675.67	\$11,342,307.14	(\$903,631.47)	-7.97%
Accounts Receivable				
1100 - Receivables	\$644,569.26	\$2,096,483.02	(\$1,451,913.76)	-69.25%
1300 - Other receivables				
1320 - Notes/loans receivable	\$334,632.06	\$335,515.82	(\$883.76)	-0.26%
1321 - Loans Receivable from Belmont	\$178,611.48	\$162,809.48	\$15,802.00	9.71%
1322 - Loans Receivable from Clayton	\$223,081.53	\$202,957.53	\$20,124.00	9.92%
1323 - Loans Receivable from Kiamichi	\$123,563.90	\$123,563.90	\$0.00	0.00%
1324 - Loans Receivable from SOCDC	\$522,001.57	\$422,001.57	\$100,000.00	23.70%
1326 - Loans Receivable from Rouleau House	\$51,909.76	\$51,909.76	\$0.00	0.00%
Total - 1300 - Other receivables	\$1,433,800.30	\$1,298,758.06	\$135,042.24	10.40%
Total Accounts Receivable	\$2,078,369.56	\$3,395,241.08	(\$1,316,871.52)	-38.79%
Other Current Asset				
1400 - Other assets				
1450 - Prepaid Expenses	\$0.00	\$26,628.16	(\$26,628.16)	-100.00%
1465 - Advances Paid	\$1,380.60	\$0.00	\$1,380.60	0.00%
Total - 1400 - Other assets	\$1,380.60	\$26,628.16	(\$25,247.56)	-94.82%
1500 - Investments				
1530 - Property/Lots held for Sale	\$375,516.35	\$375,516.35	\$0.00	0.00%
1599 - Undeposited Funds	\$64,214.11	(\$1,048.76)	\$65,262.87	-6,222.86%
Total - 1500 - Investments	\$439,730.46	\$374,467.59	\$65,262.87	17.43%
NS097 - Interfund Due to /Due from	(\$0.01)	(\$0.01)	\$0.00	0.00%
Payroll Float	\$30,420.64	\$0.00	\$30,420.64	0.00%
Total Other Current Asset	\$471,531.69	\$401,095.74	\$70,435.95	17.56%
Total Current Assets	\$12,988,576.92	\$15,138,643.96	(\$2,150,067.04)	-14.20%
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 - Stale 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	\$20,113,664.20	\$22,263,744.23	(\$2,150,080.03)	-9.66%
Liabilities & Equity				
Current Liabilities				
Accounts Payable	(\$18,375.93)	(\$19,536.23)	\$1,160.30	-5.94%
Other Current Liability	\$832,789.39	\$1,384,636.67	(\$551,847.28)	-39.86%
Total Current Liabilities	\$814,413.46	\$1,365,100.44	(\$550,686.98)	-40.34%
Long Term Liabilities				
2700 - Long-term notes & loans payable				
2770 - Long-term liabilities - Mower Loan	\$1,096.58	\$4,100.28	(\$3,003.70)	-73.26%
2780 - Lease liability	\$727.94	\$727.94	\$0.00	0.00%
Total - 2700 - Long-term notes & loans payable	\$1,824.52	\$4,828.22	(\$3,003.70)	-62.21%

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

FINANCIAL ROW	AMOUNT (JAN 2024 - OCT 2024)	COMPARATIVE AMOUNT (JAN 2023 - ADJUST 2023)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$64,926.44	\$42,867.82	\$22,058.62	51.46%
4100 - Inkind Revenue	\$938,306.07	\$1,268,433.18	(\$330,127.11)	-26.03%
4200 - Miscellaneous Revenue	\$958,445.66	\$3,707,973.17	(\$2,749,527.51)	-74.15%
4400 - State Revenue	\$1,402,290.10	\$1,306,592.16	\$95,697.94	7.32%
4500 - Federal Revenue	\$12,830,328.91	\$15,335,877.40	(\$2,505,548.49)	-16.34%
4900 - Recoveries from Programs	\$3,300,723.78	\$3,631,342.57	(\$330,618.79)	-9.10%
5000 - Rental Revenue	\$627,782.86	\$657,610.55	(\$29,827.69)	-4.54%
5100 - Program Fee Revenue	\$1,265,800.70	\$1,723,429.39	(\$457,628.69)	-26.55%
5300 - Interest and Dividends	\$269,987.23	\$178,520.67	\$91,466.56	51.24%
5400 - Revenue from other sources	\$994,622.09	\$1,736,410.96	(\$741,788.87)	-42.72%
5800 - Special Event Expense	\$4,675.00	\$8,795.33	(\$4,120.33)	-46.85%
Total - Income	\$22,657,888.84	\$29,597,853.20	(\$6,939,964.36)	-23.45%
Cost Of Sales				
8000 - Cost of Goods Sold	\$2,772.07	\$169.31	\$2,602.76	1,537.27%
Total - Cost Of Sales	\$2,772.07	\$169.31	\$2,602.76	1,537.27%
Gross Profit	\$22,655,116.77	\$29,597,683.89	(\$6,942,567.12)	-23.46%
Expense				
7000 - Grants, contracts, & direct assistance	\$1,105,809.75	\$1,922,010.30	(\$816,200.55)	-42.47%
7200 - Salaries & related expenses	\$9,835,383.29	\$11,604,663.35	(\$1,769,280.06)	-15.25%
7300 - Indirect Cost Pool Expense	\$1,732,118.39	\$1,917,677.75	(\$185,559.36)	-9.68%
7500 - Contract/Consultant Services	\$1,704,379.13	\$1,695,750.90	\$8,628.23	0.51%
8100 - Non personnel expenses	\$1,084,068.02	\$1,174,591.55	(\$90,523.53)	-7.71%
8200 - Facility & equipment expenses	\$2,407,249.00	\$2,236,740.58	\$170,508.42	7.62%
8300 - Travel & meetings expenses	\$555,908.33	\$635,710.63	(\$79,802.30)	-12.55%
8400 - Insurance Expense	\$1,876,591.81	\$2,043,164.06	(\$166,572.25)	-8.15%
8600 - Business expenses	\$918.50	\$8,063.62	(\$7,145.12)	-88.61%
8700 - Food Expenses	\$1,369,386.62	\$1,609,006.95	(\$239,620.33)	-14.89%
8800 - In-Kind Expenses	\$938,306.07	\$1,268,433.18	(\$330,127.11)	-26.03%
Total - Expense	\$22,610,118.91	\$26,115,812.87	(\$3,505,693.96)	-13.42%
Net Ordinary Income	\$44,997.86	\$3,481,871.02	(\$3,436,873.16)	-98.71%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,641,377.31	\$1,661,896.44	(\$20,519.13)	-1.23%
Total - Other Expense	\$1,641,377.31	\$1,661,896.44	(\$20,519.13)	-1.23%
Net Other Income	(\$1,641,377.31)	(\$1,661,896.44)	\$20,519.13	-1.23%
Net Income	(\$1,596,379.45)	\$1,819,974.58	(\$3,416,354.03)	-187.71%

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

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	\$10,438,675.67
Total Bank	\$10,438,675.67
Accounts Receivable	
1100 - Receivables	\$644,569.26
1300 - Other receivables	\$1,433,800.30
Total Accounts Receivable	\$2,078,369.56
Other Current Asset	
1400 - Other assets	\$1,380.60
1500 - Investments	\$439,730.46
NS097 - Interfund Due to /Due from	(\$0.01)
Payroll Float	\$30,420.64
Total Other Current Asset	\$471,531.69
Total Current Assets	\$12,988,576.92
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
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	\$20,113,664.20
Liabilities & Equity	
Current Liabilities	
Accounts Payable	
2000 - Payables	(\$18,375.93)
Total Accounts Payable	(\$18,375.93)
Other Current Liability	
2100 - Accrued liabilities	\$797,647.67
2400 - Refundable Advances	\$35,141.72
Total Other Current Liability	\$832,789.39
Total Current Liabilities	\$814,413.46
Long Term Liabilities	
2700 - Long-term notes & loans payable	
2770 - Long-term liabilities - Mower Loan	\$1,096.58
2780 - Lease liability	\$727.94
Total - 2700 - Long-term notes & loans payable	\$1,824.52
Total Long Term Liabilities	\$1,824.52
Equity	
3000 - Net Assets	\$12,712.37
Retained Earnings	\$20,881,093.30
Net Income	(\$1,596,379.45)
Total Equity	\$19,297,426.22
Total Liabilities & Equity	\$20,113,664.20

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

FINANCIAL ROW	- UNASSIGNED - Amount	CAPITAL Amount	FUNDRAISING Amount	MANAGEMENT & GENERAL (ADMIN) Amount	OTHER Amount	PROGRAM SERVICES Amount	TOTAL Amount
Operating Activities							
Net Income	(\$1,917,607.66)	(\$32,603.60)	\$746.85	(\$42,708.02)	\$555.82	\$395,237.16	(\$1,596,379.45)
Adjustments to Net Income							
Accounts Receivable	\$1,251,276.26	\$831.28	\$0.00	\$214,710.62	\$0.00	(\$149,946.64)	\$1,316,871.52
Other Current Asset	\$277,292.61	\$0.00	\$0.00	(\$59,184.96)	\$0.00	(\$223,280.73)	(\$5,173.08)
Accounts Payable	\$1,024.06	\$0.00	\$0.00	\$11,515.56	\$0.00	(\$11,379.32)	\$1,160.30
Sales Tax Payable	\$13,230.02	\$0.00	\$0.00	\$0.00	\$0.00	(\$8,315.80)	\$4,914.22
Other Current Liabilities	\$228,991.53	\$0.00	\$0.00	(\$46,567.62)	\$0.00	(\$739,185.41)	(\$556,761.50)
Total Adjustments to Net Income	\$1,771,814.48	\$831.28	\$0.00	\$120,473.60	\$0.00	(\$1,132,107.90)	\$761,011.46
Total Operating Activities	(\$145,793.18)	(\$31,772.32)	\$746.85	\$77,765.58	\$555.82	(\$736,870.74)	(\$835,367.99)
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	(\$2,977.10)	\$0.00	\$0.00	\$0.00	\$0.00	(\$26.60)	(\$3,003.70)
Other Equity	\$0.00	\$0.00	\$0.00	(\$585,592.75)	\$0.00	\$585,582.85	(\$9.90)
Total Financing Activities	(\$2,977.10)	\$0.00	\$0.00	(\$585,592.75)	\$0.00	\$585,556.25	(\$3,013.60)
Net Change in Cash for Period	(\$148,770.28)	(\$31,772.32)	\$746.85	(\$507,827.17)	\$555.82	(\$151,301.50)	(\$838,368.60)
Cash at Beginning of Period	\$21,701,928.01	\$2,732.89	\$964.22	(\$8,924,130.62)	\$281.25	(\$1,440,517.37)	\$11,341,258.38
Cash at End of Period	\$21,553,157.73	(\$29,039.43)	\$1,711.07	(\$9,431,957.79)	\$837.07	(\$1,591,818.87)	\$10,502,889.78

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$1,596,379.45)
Adjustments to Net Income	
Accounts Receivable	\$1,316,871.52
Other Current Asset	(\$5,173.08)
Accounts Payable	\$1,160.30
Sales Tax Payable	\$4,914.22
Other Current Liabilities	(\$556,761.50)
Total Adjustments to Net Income	\$761,011.46
Total Operating Activities	(\$835,367.99)
Investing Activities	
Other Asset	\$12.99
Total Investing Activities	\$12.99
Financing Activities	
Long Term Liabilities	(\$3,003.70)
Other Equity	(\$9.90)
Total Financing Activities	(\$3,013.60)
Net Change in Cash for Period	(\$838,368.60)
Cash at Beginning of Period	\$11,341,258.38
Cash at End of Period	\$10,502,889.78

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$1,596,379.45)
Adjustments to Net Income	
Accounts Receivable	\$1,316,871.52
Other Current Asset	(\$5,173.08)
Accounts Payable	\$1,160.30
Sales Tax Payable	\$4,914.22
Other Current Liabilities	(\$556,761.50)
Total Adjustments to Net Income	\$761,011.46
Total Operating Activities	(\$835,367.99)
Investing Activities	
Other Asset	\$12.99
Total Investing Activities	\$12.99
Financing Activities	
Long Term Liabilities	(\$3,003.70)
Other Equity	(\$9.90)
Total Financing Activities	(\$3,013.60)
Net Change in Cash for Period	(\$838,368.60)
Cash at Beginning of Period	\$11,341,258.38
Cash at End of Period	\$10,502,889.78

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Revenue Stream Distribution by Month
Aug 2024, Sep 2024, Oct 2024

Monthly distribution of Revenue by Revenue Type and Subtype

REVENUE STREAM	AUGUST 2024	SEPTEMBER 2024	OCTOBER 2024	TOTAL
Federal Grants	\$999,453.46	\$1,310,842.21	\$918,539.21	\$3,228,834.88
Federal Pass Through	\$496,129.71	\$421,783.21	\$652,486.76	\$1,570,399.68
Recoveries	\$337,367.04	\$370,760.37	\$335,691.15	\$1,043,818.56
Non Federal	\$281,363.58	\$45,580.57	\$56,781.69	\$383,725.84
Program Revenue	\$156,428.02	\$145,960.49	\$161,943.10	\$464,331.61
Federal Contract	\$110,554.08	\$104,473.84	\$107,706.06	\$322,733.98
State Contracts	\$20,670.23	\$92,495.03	\$68,481.35	\$181,646.61
State Pass Through	\$29,516.07	\$31,262.78	\$9,823.84	\$70,602.69
Transit Contract	\$28,608.30	\$27,458.61	\$22,362.03	\$78,428.94
State Grants	\$2,026.64	\$23,859.00		\$25,885.64
Apartment Revenue	\$11,630.00	\$11,630.00	\$11,630.00	\$34,890.00
Transit Fares	\$6,427.75	\$7,040.60	\$6,643.95	\$20,112.30
Management Fees	\$2,953.98	\$2,484.92	\$2,499.94	\$7,938.84
Corporate/Business/Foundation	\$36.73	\$28.79	\$2,500.00	\$2,565.52
- Unassigned -	(\$358.00)		\$170.00	(\$188.00)
Miscellaneous	\$28.05	\$13.88		\$41.93
Total	\$2,482,835.64	\$2,595,674.30	\$2,357,259.08	\$7,435,769.02

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

Agency

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$71,367.00	\$64,926.44	\$6,440.56	90.98%
4100 - Inkind Revenue	\$1,810,359.10	\$938,306.07	\$872,053.03	51.83%
4200 - Miscellaneous Revenue	\$12,660.00	\$958,555.66	(\$945,895.66)	7,571.53%
4400 - State Revenue	\$2,753,351.62	\$1,447,275.10	\$1,306,076.52	52.56%
4500 - Federal Revenue	\$19,665,858.23	\$12,830,328.91	\$6,835,529.32	65.24%
4900 - Recoveries from Programs	\$2,012,486.97	\$3,300,723.78	(\$1,288,236.81)	164.01%
5000 - Rental Revenue	\$0.00	\$646,193.86	(\$646,193.86)	0.00%
5100 - Program Fee Revenue	\$115,000.00	\$1,271,888.17	(\$1,156,888.17)	1,105.99%
5300 - Interest and Dividends	\$0.00	\$270,341.89	(\$270,341.89)	0.00%
5400 - Revenue from other sources	\$0.00	\$994,622.09	(\$994,622.09)	0.00%
5800 - Special Event Expense	\$0.00	\$4,675.00	(\$4,675.00)	0.00%
Total - Income	\$26,441,082.92	\$22,727,836.97	\$3,713,245.95	85.96%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$2,772.07	(\$2,772.07)	0.00%
Total - Cost Of Sales	\$0.00	\$2,772.07	(\$2,772.07)	0.00%
Gross Profit	\$26,441,082.92	\$22,725,064.90	\$3,716,018.02	85.95%
Expense				
7000 - Grants, contracts, & direct assistance	\$115,321.25	\$1,105,809.75	(\$990,488.50)	958.90%
7200 - Salaries & related expenses	\$13,545,054.01	\$10,342,894.35	\$3,202,159.66	76.36%
7300 - Indirect Cost Pool Expense	\$2,367,187.78	\$1,819,692.82	\$547,494.96	76.87%
7500 - Contract/Consultant Services	\$1,659,569.47	\$1,704,379.13	(\$44,809.66)	102.70%
8100 - Non personnel expenses	\$1,188,903.87	\$1,084,068.02	\$104,835.85	91.18%
8200 - Facility & equipment expenses	\$1,343,722.15	\$2,407,354.08	(\$1,063,631.93)	179.16%
8300 - Travel & meetings expenses	\$1,210,115.01	\$557,032.25	\$653,082.76	46.03%
8400 - Insurance Expense	\$171,915.40	\$1,876,591.81	(\$1,704,676.41)	1,091.58%
8600 - Business expenses	\$0.00	\$918.50	(\$918.50)	0.00%
8700 - Food Expenses	\$629,281.20	\$1,369,527.70	(\$740,246.50)	217.63%
8800 - In-Kind Expenses	\$1,562,857.54	\$938,306.07	\$624,551.47	60.04%
Total - Expense	\$23,793,927.68	\$23,206,574.48	\$587,353.20	97.53%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$2,497,688.57	\$1,641,377.31	\$856,311.26	65.72%
Total - Other Expense	\$2,497,688.57	\$1,641,377.31	\$856,311.26	65.72%
Net Income	\$149,466.67	(\$2,122,886.89)	\$2,272,353.56	-1,420.31%

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

Operating

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$0.00	\$3,683.42	(\$3,683.42)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$35,470.44	(\$35,470.44)	0.00%
4400 - State Revenue	\$0.00	\$282,091.92	(\$282,091.92)	0.00%
4900 - Recoveries from Programs	\$2,012,486.97	\$3,300,723.78	(\$1,288,236.81)	164.01%
5000 - Rental Revenue	\$0.00	\$256,140.30	(\$256,140.30)	0.00%
5100 - Program Fee Revenue	\$0.00	\$605.59	(\$605.59)	0.00%
5300 - Interest and Dividends	\$0.00	\$60,810.42	(\$60,810.42)	0.00%
5400 - Revenue from other sources	\$0.00	\$453,337.40	(\$453,337.40)	0.00%
5800 - Special Event Expense	\$0.00	\$40.00	(\$40.00)	0.00%
Total - Income	\$2,012,486.97	\$4,392,903.27	(\$2,380,416.30)	218.28%
Gross Profit	\$2,012,486.97	\$4,392,903.27	(\$2,380,416.30)	218.28%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$10,000.00	(\$10,000.00)	0.00%
7200 - Salaries & related expenses	\$1,480,512.38	\$1,152,196.59	\$328,315.79	77.82%
7300 - Indirect Cost Pool Expense	\$0.00	\$49,937.12	(\$49,937.12)	0.00%
7500 - Contract/Consultant Services	\$115,215.21	\$207,355.41	(\$92,140.20)	179.97%
8100 - Non personnel expenses	\$54,841.35	\$200,202.72	(\$145,361.37)	365.06%
8200 - Facility & equipment expenses	\$40,902.28	\$290,572.56	(\$249,670.28)	710.41%
8300 - Travel & meetings expenses	\$82,133.76	\$65,860.26	\$16,273.50	80.19%
8400 - Insurance Expense	\$34,962.98	\$1,386,601.63	(\$1,351,638.65)	3,965.91%
8600 - Business expenses	\$0.00	\$911.00	(\$911.00)	0.00%
8700 - Food Expenses	\$0.00	\$14,026.47	(\$14,026.47)	0.00%
Total - Expense	\$1,808,567.96	\$3,377,663.76	(\$1,569,095.80)	186.76%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$153,301.25	\$364,400.98	(\$211,099.73)	237.70%
Total - Other Expense	\$153,301.25	\$364,400.98	(\$211,099.73)	237.70%
Net Income	\$50,617.76	\$650,838.53	(\$600,220.77)	1,285.79%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
Oct 2024

Financial Row	- No Department -		10 Operating	
	Administration		Building Funds	Total
	Amount	Amount	Amount	Amount
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$0.00
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$0.00
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$0.00
4900 - Recoveries from Programs	\$0.00	\$332,191.15	\$0.00	\$332,191.15
5000 - Rental Revenue	\$0.00	\$0.00	\$25,377.33	\$25,377.33
5100 - Program Fee Revenue	\$4.30	\$0.00	\$605.59	\$605.59
5300 - Interest and Dividends	\$0.00	\$10,381.95	\$0.00	\$10,381.95
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$4.30	\$342,573.10	\$25,982.92	\$368,556.02
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$47,041.21	\$129,136.37	\$0.00	\$129,136.37
7300 - Indirect Cost Pool Expense	\$4,303.55	\$6,593.46	\$0.00	\$6,593.46
7500 - Contract/Consultant Services	\$300.00	\$16,119.17	\$6,701.70	\$22,820.87
8100 - Non personnel expenses	\$1,724.47	\$10,338.19	\$35.03	\$10,373.22
8200 - Facility & equipment expenses	\$7,916.27	\$3,657.10	\$2,884.99	\$6,542.09
8300 - Travel & meetings expenses	\$601.25	\$3,458.58	\$0.00	\$3,458.58
8400 - Insurance Expense	\$0.00	\$133,249.11	\$0.00	\$133,249.11
8700 - Food Expenses	\$76,691.07	\$1,115.51	\$0.00	\$1,115.51
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$138,577.82	\$303,667.49	\$9,621.72	\$313,289.21
Net Ordinary Income	(\$138,573.52)	\$38,905.61	\$16,361.20	\$55,266.81
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$923.12	\$9,019.90	\$91.02	\$9,110.92
Total - Other Expense	\$923.12	\$9,019.90	\$91.02	\$9,110.92

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	\$44,247.00	\$34,747.00	\$9,500.00	78.53%
4100 - In-Kind Revenue	\$1,035,213.56	\$562,010.92	\$473,202.64	54.29%
4200 - Miscellaneous Revenue	\$0.00	\$809,236.38	(\$809,236.38)	0.00%
4400 - State Revenue	\$128,235.88	\$201,311.62	(\$73,075.74)	156.99%
4500 - Federal Revenue	\$8,004,734.49	\$7,081,980.09	\$922,754.40	88.47%
5100 - Program Fee Revenue	\$0.00	\$498,833.20	(\$498,833.20)	0.00%
5300 - Interest and Dividends	\$0.00	\$25,229.98	(\$25,229.98)	0.00%
5400 - Revenue from other sources	\$0.00	\$34,111.02	(\$34,111.02)	0.00%
Total - Income	\$9,212,430.93	\$9,247,460.21	(\$35,029.28)	100.38%
Gross Profit	\$9,212,430.93	\$9,247,460.21	(\$35,029.28)	100.38%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$34,111.02	(\$34,111.02)	0.00%
7200 - Salaries & related expenses	\$4,754,872.19	\$4,405,834.11	\$349,038.08	92.66%
7300 - Indirect Cost Pool Expense	\$911,549.65	\$869,486.86	\$42,062.79	95.39%
7500 - Contract/Consultant Services	\$1,110,976.00	\$1,092,406.65	\$18,569.35	98.33%
8100 - Non personnel expenses	\$176,600.57	\$465,888.83	(\$289,288.26)	263.81%
8200 - Facility & equipment expenses	\$169,361.00	\$319,558.98	(\$150,197.98)	188.69%
8300 - Travel & meetings expenses	\$141,440.00	\$95,360.84	\$46,079.16	67.42%
8400 - Insurance Expense	\$43,000.00	\$128,714.72	(\$85,714.72)	299.34%
8700 - Food Expenses	\$567,781.20	\$932,959.05	(\$365,177.85)	164.32%
8800 - In-Kind Expenses	\$787,712.00	\$562,010.92	\$225,701.08	71.35%
Total - Expense	\$8,663,292.61	\$8,906,331.98	(\$243,039.37)	102.81%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$386,647.00	\$471,430.77	(\$84,783.77)	121.93%
Total - Other Expense	\$386,647.00	\$471,430.77	(\$84,783.77)	121.93%
Net Income	\$162,491.32	(\$130,302.54)	\$292,793.86	-80.19%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
Oct 2024

Financial Row	20 Early Childhood							
	CACFP - Daycare Homes	Early Head Start - CC	Early Learning Centers		HS/EHS		Total	Total
	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
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$9,823.84	\$22,845.68	\$32,669.52	\$32,669.52
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$51,752.66	\$0.00	\$0.00	\$47,762.20	\$47,762.20	\$99,514.86
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4500 - Federal Revenue	\$91,209.07	\$281,614.00	\$0.00	\$0.00	\$0.00	\$460,783.37	\$460,783.37	\$833,606.44
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$0.00	\$0.00	\$46,317.70	\$0.00	\$0.00	\$0.00	\$0.00	\$46,317.70
5300 - Interest and Dividends	\$0.00	\$0.00	\$34.00	\$0.00	\$0.00	\$0.00	\$0.00	\$34.00
5400 - Revenue from other sources	\$0.00	\$0.00	\$34,111.02	\$0.00	\$0.00	\$0.00	\$0.00	\$34,111.02
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$91,209.07	\$281,614.00	\$132,215.38	\$0.00	\$9,823.84	\$531,391.25	\$541,215.09	\$1,046,253.54
Expense								
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$34,111.02	\$0.00	\$0.00	\$0.00	\$0.00	\$34,111.02
7200 - Salaries & related expenses	\$8,336.72	\$53,738.41	\$56,850.07	\$5,338.83	\$66,051.75	\$245,858.96	\$317,249.54	\$447,722.98
7300 - Indirect Cost Pool Expense	\$1,622.52	\$10,199.37	\$9,756.34	\$1,885.30	\$14,335.52	\$48,559.13	\$64,779.95	\$88,620.63
7500 - Contract/Consultant Services	\$0.00	\$72,767.06	\$404.25	\$0.00	\$0.00	\$2,099.59	\$2,099.59	\$75,270.90
8100 - Non personnel expenses	\$799.09	\$7,252.84	\$3,758.50	\$2,213.57	\$12.63	\$24,688.97	\$26,915.17	\$38,799.17
8200 - Facility & equipment expenses	\$374.00	\$5,702.87	\$1,938.13	\$6,330.57	\$159.66	\$10,453.03	\$16,943.26	\$24,958.26
8300 - Travel & meetings expenses	\$2,244.74	\$1,471.78	\$330.98	\$639.63	\$1,084.82	\$4,930.20	\$6,654.65	\$10,702.15
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$0.00	\$0.00	\$10,784.81	\$3,603.03	\$0.00	\$70,167.95	\$73,770.98	\$84,555.79
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$9,823.84	\$22,845.68	\$32,669.52	\$32,669.52
Total - Expense	\$13,377.07	\$151,132.33	\$117,934.10	\$20,010.93	\$91,468.22	\$429,603.51	\$541,082.66	\$823,526.16
Net Ordinary Income	\$77,832.00	\$130,481.67	\$14,281.28	(\$20,010.93)	(\$81,644.38)	\$101,787.74	\$132.43	\$222,727.38
Other Income and Expenses								
Other Expense								
8500 - Other Expense	\$0.00	\$26,474.37	\$254.98	\$2,426.09	\$1,561.48	\$10,627.20	\$14,614.77	\$41,344.12
Total - Other Expense	\$0.00	\$26,474.37	\$254.98	\$2,426.09	\$1,561.48	\$10,627.20	\$14,614.77	\$41,344.12

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	\$27,120.00	\$26,477.02	\$642.98	97.63%
4100 - Inkind Revenue	\$587,645.54	\$376,295.15	\$211,350.39	64.03%
4200 - Miscellaneous Revenue	\$12,660.00	\$13,774.65	(\$1,114.65)	108.80%
4400 - State Revenue	\$2,612,955.74	\$716,183.86	\$1,896,771.88	27.41%
4500 - Federal Revenue	\$6,245,343.68	\$2,046,431.82	\$4,198,911.86	32.77%
5300 - Interest and Dividends	\$0.00	\$1,278.50	(\$1,278.50)	0.00%
5400 - Revenue from other sources	\$0.00	\$54,769.77	(\$54,769.77)	0.00%
5800 - Special Event Expense	\$0.00	\$3,969.00	(\$3,969.00)	0.00%
Total - Income	\$9,485,724.96	\$3,239,179.77	\$6,246,545.19	34.15%
Gross Profit	\$9,485,724.96	\$3,239,179.77	\$6,246,545.19	34.15%
Expense				
7000 - Grants, contracts, & direct assistance	\$115,321.25	\$91,733.02	\$23,588.23	79.55%
7200 - Salaries & related expenses	\$4,579,434.57	\$1,466,380.53	\$3,113,054.04	32.02%
7300 - Indirect Cost Pool Expense	\$874,585.73	\$291,726.55	\$582,859.18	33.36%
7500 - Contract/Consultant Services	\$240,509.00	\$91,497.90	\$149,011.10	38.04%
8100 - Non personnel expenses	\$610,864.61	\$175,238.00	\$435,626.61	28.69%
8200 - Facility & equipment expenses	\$312,288.71	\$142,671.40	\$169,617.31	45.69%
8300 - Travel & meetings expenses	\$311,829.43	\$108,851.21	\$202,978.22	34.91%
8400 - Insurance Expense	\$50.00	\$6,047.32	(\$5,997.32)	12,094.64%
8600 - Business expenses	\$0.00	\$7.50	(\$7.50)	0.00%
8700 - Food Expenses	\$61,500.00	\$12,278.52	\$49,221.48	19.97%
8800 - In-Kind Expenses	\$587,645.54	\$376,295.15	\$211,350.39	64.03%
Total - Expense	\$7,694,028.84	\$2,762,727.10	\$4,931,301.74	35.91%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,552,202.73	\$390,018.83	\$1,162,183.90	25.13%
Total - Other Expense	\$1,552,202.73	\$390,018.83	\$1,162,183.90	25.13%
Net Income	\$239,493.39	\$86,433.84	\$153,059.55	36.09%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
Oct 2024

Financial Row	30 Community Service														
		CASA	Community Services	Drug Free Communities	Healthy Start	Mentoring	RCOR TRI-CORP	RSVP	RX	Safe Place Healing Hearts	Second Chance	VOCA	WORK READY OK	Youth Build	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense															
Income															
4000 - Contribution Revenue	\$0.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$95.00	\$0.00	\$2,520.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,115.00
4100 - Inkind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$197.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,334.04	\$2,531.56
4200 - Miscellaneous 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
4400 - State Revenue	\$693.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$57,339.72	\$0.00	\$58,032.85
4500 - Federal Revenue	\$0.00	\$0.00	\$8,600.00	\$2,473.00	\$72,288.00	\$0.00	\$10,984.00	\$5,285.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$72,146.00	\$171,776.00
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	\$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
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,643.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,643.52
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$789.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$789.00
Total - Income	\$693.13	\$2,500.00	\$8,600.00	\$2,473.00	\$72,288.00	\$95.00	\$20,627.52	\$8,791.52	\$0.00	\$0.00	\$0.00	\$0.00	\$57,339.72	\$74,480.04	\$247,887.93
Expense															
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$5,962.52	\$9,643.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00	\$0.00	\$104.94	\$0.00	\$836.46	\$17,447.44
7200 - Salaries & related expenses	\$23,089.43	\$0.00	\$0.00	\$6,245.91	\$47,277.78	\$4,119.26	\$19,520.50	\$4,964.07	\$0.00	\$6,421.62	\$9,178.25	\$9,027.31	\$5,507.58	\$18,036.54	\$153,388.25
7300 - Indirect Cost Pool Expense	\$4,539.77	\$0.00	\$0.00	\$1,214.91	\$9,331.66	\$800.72	\$3,837.37	\$1,020.15	\$0.00	\$1,311.72	\$1,810.81	\$1,759.07	\$1,072.84	\$3,670.50	\$30,369.52
7500 - Contract/Consultant Services	\$0.00	\$1,467.00	\$2,140.00	\$0.00	\$1,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$65.00	\$0.00	\$5,472.00
8100 - Non personnel expenses	\$0.00	\$97.32	\$445.58	\$0.00	\$1,668.63	\$4,070.88	\$1,172.63	\$305.30	\$0.00	\$212.93	(\$132.73)	\$62.37	\$8,160.56	\$5,462.51	\$21,525.98
8200 - Facility & equipment expenses	\$142.84	\$303.00	\$86.00	\$0.00	\$4,167.00	\$95.00	\$950.00	\$259.00	\$0.00	\$492.00	\$380.00	\$114.00	\$4,303.09	\$1,500.00	\$12,791.93
8300 - Travel & meetings expenses	\$0.00	\$351.08	(\$174.20)	\$0.00	\$2,450.19	\$53.60	\$619.91	\$432.62	\$48.91	\$468.33	\$1,504.15	\$203.01	\$1,630.80	\$1,591.28	\$9,179.68
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,386.93	\$0.00	\$1,386.93
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$197.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,334.04	\$2,531.56
Total - Expense	\$27,772.04	\$2,218.40	\$8,459.90	\$17,104.34	\$66,695.26	\$9,139.46	\$26,100.41	\$7,178.66	\$48.91	\$9,806.60	\$12,740.48	\$11,270.70	\$22,126.80	\$33,431.33	\$254,093.29
Net Ordinary Income	(\$27,078.91)	\$281.60	\$140.10	(\$14,631.34)	\$5,592.74	(\$9,044.46)	(\$5,472.89)	\$1,612.86	(\$48.91)	(\$9,806.60)	(\$12,740.48)	(\$11,270.70)	\$35,212.92	\$41,048.71	(\$6,205.36)
Other Income and Expenses															
Other Expense															
8500 - Other Expense	\$17.70	\$438.05	\$5,452.00	\$0.00	\$7,486.86	\$229.79	\$414.96	\$7,045.82	\$0.00	\$126.18	\$0.00	\$0.00	\$19,384.79	\$51,089.76	\$91,685.91
Total - Other Expense	\$17.70	\$438.05	\$5,452.00	\$0.00	\$7,486.86	\$229.79	\$414.96	\$7,045.82	\$0.00	\$126.18	\$0.00	\$0.00	\$19,384.79	\$51,089.76	\$91,685.91

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	\$98,399.60	(\$98,399.60)	0.00%
4400 - State Revenue	\$12,160.00	\$9,488.71	\$2,671.29	78.03%
4500 - Federal Revenue	\$4,978,719.06	\$2,932,280.08	\$2,046,438.98	58.90%
5000 - Rental Revenue	\$0.00	\$388,100.56	(\$388,100.56)	0.00%
5100 - Program Fee Revenue	\$0.00	\$102,959.51	(\$102,959.51)	0.00%
5300 - Interest and Dividends	\$0.00	\$160,428.26	(\$160,428.26)	0.00%
5400 - Revenue from other sources	\$0.00	\$356,851.93	(\$356,851.93)	0.00%
Total - Income	\$5,178,379.06	\$4,048,508.65	\$1,129,870.41	78.18%
Gross Profit	\$5,178,379.06	\$4,048,508.65	\$1,129,870.41	78.18%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$876,115.68	(\$876,115.68)	0.00%
7200 - Salaries & related expenses	\$1,942,701.87	\$1,343,201.54	\$599,500.33	69.14%
7300 - Indirect Cost Pool Expense	\$405,751.40	\$274,027.67	\$131,723.73	67.54%
7500 - Contract/Consultant Services	\$182,069.26	\$174,745.32	\$7,323.94	95.98%
8100 - Non personnel expenses	\$292,397.34	\$110,961.23	\$181,436.11	37.95%
8200 - Facility & equipment expenses	\$773,370.16	\$947,445.83	(\$174,075.67)	122.51%
8300 - Travel & meetings expenses	\$541,711.82	\$118,010.26	\$423,701.56	21.78%
8400 - Insurance Expense	\$12,902.42	\$180,389.17	(\$167,486.75)	1,398.10%
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	\$4,338,404.27	\$4,025,562.48	\$312,841.79	92.79%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$388,537.59	\$235,527.36	\$153,010.23	60.62%
Total - Other Expense	\$388,537.59	\$235,527.36	\$153,010.23	60.62%
Net Income	\$451,437.20	(\$212,581.19)	\$664,018.39	-47.09%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
Oct 2024

Financial Row	40 Housing Department									
	Apartments		Construction	HUD 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	\$6,502.98	\$0.00	\$6,502.98	\$0.00	\$1,968.33	\$8,471.31
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$105,737.73	\$105,737.73
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	\$0.00	\$39,798.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$39,798.00
5100 - Program Fee Revenue	\$0.00	\$503.11	\$0.00	\$2,499.94	\$3,083.52	\$0.00	\$3,083.52	\$0.00	\$0.00	\$6,086.57
5300 - Interest and Dividends	\$11,630.00	\$1,338.45	\$0.00	\$0.00	\$39.35	\$0.00	\$39.35	\$0.00	\$0.00	\$13,007.80
5400 - Revenue from other sources	\$0.00	\$1,225.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,225.00
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	\$11,630.00	\$42,864.56	\$0.00	\$2,499.94	\$9,625.85	\$0.00	\$9,625.85	\$0.00	\$107,706.06	\$174,326.41
Expense										
7000 - Grants, contracts, & direct assistance	\$12,680.00	\$1,495.00	\$0.00	\$0.00	\$31.75	\$0.00	\$31.75	\$0.00	\$0.00	\$14,206.75
7200 - Salaries & related expenses	\$7,834.12	\$3,707.67	\$64,088.90	\$179.44	(\$16,959.21)	\$4,021.52	(\$12,937.69)	\$13,038.24	\$38,395.14	\$114,305.82
7300 - Indirect Cost Pool Expense	\$1,562.08	\$723.10	\$12,555.20	\$657.24	(\$3,351.34)	\$819.20	(\$2,532.14)	\$2,531.49	\$7,736.07	\$23,233.04
7500 - Contract/Consultant Services	\$0.00	\$2,310.53	\$38.00	\$0.00	\$4,051.50	\$0.00	\$4,051.50	\$0.00	\$106.61	\$6,506.64
8100 - Non personnel expenses	\$344.54	\$395.97	(\$72.25)	\$87.19	\$2,505.85	\$0.00	\$2,505.85	\$1,388.12	\$2,583.70	\$7,233.12
8200 - Facility & equipment expenses	\$620.53	\$14,523.14	\$225.00	\$0.00	\$85,841.27	\$0.00	\$85,841.27	\$1,121.50	\$1,660.00	\$103,991.44
8300 - Travel & meetings expenses	\$0.00	\$202.03	\$1,361.21	\$0.00	(\$216.75)	\$0.00	(\$216.75)	\$2,542.65	\$7,691.27	\$11,580.41
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$23,041.27	\$23,357.44	\$78,196.06	\$923.87	\$71,903.07	\$4,840.72	\$76,743.79	\$20,622.00	\$58,172.79	\$281,057.22
Net Ordinary Income	(\$11,411.27)	\$19,507.12	(\$78,196.06)	\$1,576.07	(\$62,277.22)	(\$4,840.72)	(\$67,117.94)	(\$20,622.00)	\$49,533.27	(\$106,730.81)
Other Income and Expenses										
Other Expense										
8500 - Other Expense	\$67.01	\$849.36	\$3,910.63	\$0.00	\$3,369.09	\$0.00	\$3,369.09	\$0.00	\$225.84	\$8,421.93
Total - Other Expense	\$67.01	\$849.36	\$3,910.63	\$0.00	\$3,369.09	\$0.00	\$3,369.09	\$0.00	\$225.84	\$8,421.93

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	\$149,732.00	(\$149,732.00)	0.00%
4500 - Federal Revenue	\$437,061.00	\$694,636.92	(\$257,575.92)	158.93%
5000 - Rental Revenue	\$0.00	\$1,953.00	(\$1,953.00)	0.00%
5100 - Program Fee Revenue	\$115,000.00	\$308,638.73	(\$193,638.73)	268.38%
5300 - Interest and Dividends	\$0.00	\$862.28	(\$862.28)	0.00%
5400 - Revenue from other sources	\$0.00	\$93,250.03	(\$93,250.03)	0.00%
Total - Income	\$552,061.00	\$1,249,072.96	(\$697,011.96)	226.26%
Gross Profit	\$552,061.00	\$1,249,072.96	(\$697,011.96)	226.26%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$93,250.03	(\$93,250.03)	0.00%
7200 - Salaries & related expenses	\$787,533.00	\$849,419.75	(\$61,886.75)	107.86%
7300 - Indirect Cost Pool Expense	\$175,301.00	\$172,280.43	\$3,020.57	98.28%
7500 - Contract/Consultant Services	\$10,800.00	\$32,883.00	(\$22,083.00)	304.47%
8100 - Non personnel expenses	\$54,200.00	\$44,800.25	\$9,399.75	82.66%
8200 - Facility & equipment expenses	\$47,800.00	\$285,952.05	(\$238,152.05)	598.23%
8300 - Travel & meetings expenses	\$133,000.00	\$155,634.25	(\$22,634.25)	117.02%
8400 - Insurance Expense	\$81,000.00	\$85,994.65	(\$4,994.65)	106.17%
Total - Expense	\$1,289,634.00	\$1,720,214.41	(\$430,580.41)	133.39%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$17,000.00	\$116,019.85	(\$99,019.85)	682.47%
Total - Other Expense	\$17,000.00	\$116,019.85	(\$99,019.85)	682.47%
Net Income	(\$754,573.00)	(\$587,161.30)	(\$167,411.70)	77.81%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
Oct 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	\$0.00	\$0.00
4500 - Federal Revenue	\$0.00	\$370,339.00	\$370,339.00
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$1,953.00	\$1,953.00
5100 - Program Fee Revenue	\$0.00	\$29,005.98	\$29,005.98
5300 - Interest and Dividends	\$0.00	\$35.57	\$35.57
5400 - Revenue from other sources	\$0.00	\$80,655.57	\$80,655.57
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00
Total - Income	\$0.00	\$481,989.12	\$481,989.12
Expense			
7000 - Grants, contracts, & direct assistance	\$0.00	\$80,655.57	\$80,655.57
7200 - Salaries & related expenses	\$2,737.44	\$87,637.38	\$90,374.82
7300 - Indirect Cost Pool Expense	\$547.04	\$17,705.42	\$18,252.46
7500 - Contract/Consultant Services	\$0.00	\$1,605.50	\$1,605.50
8100 - Non personnel expenses	\$0.00	\$5,829.55	\$5,829.55
8200 - Facility & equipment expenses	\$0.00	\$89,614.11	\$89,614.11
8300 - Travel & meetings expenses	\$0.00	\$21,209.72	\$21,209.72
8400 - Insurance Expense	\$0.00	\$4,766.19	\$4,766.19
8700 - Food Expenses	\$0.00	\$0.00	\$0.00
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00
Total - Expense	\$3,284.48	\$309,023.44	\$312,307.92
Net Ordinary Income	(\$3,284.48)	\$172,965.68	\$169,681.20
Other Income and Expenses			
Other Expense			
8500 - Other Expense	\$0.00	\$553.82	\$553.82
Total - Other Expense	\$0.00	\$553.82	\$553.82

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	\$19.00	(\$19.00)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$1,791.73	(\$1,791.73)	0.00%
4400 - State Revenue	\$0.00	\$88,466.99	(\$88,466.99)	0.00%
4500 - Federal Revenue	\$0.00	\$75,000.00	(\$75,000.00)	0.00%
5100 - Program Fee Revenue	\$0.00	\$352,998.54	(\$352,998.54)	0.00%
5300 - Interest and Dividends	\$0.00	\$21,732.45	(\$21,732.45)	0.00%
5400 - Revenue from other sources	\$0.00	\$2,301.94	(\$2,301.94)	0.00%
5800 - Special Event Expense	\$0.00	\$626.00	(\$626.00)	0.00%
Total - Income	\$0.00	\$542,936.65	(\$542,936.65)	0.00%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$2,371.54	(\$2,371.54)	0.00%
Total - Cost Of Sales	\$0.00	\$2,371.54	(\$2,371.54)	0.00%
Gross Profit	\$0.00	\$540,565.11	(\$540,565.11)	0.00%
Expense				
7200 - Salaries & related expenses	\$0.00	\$253,759.41	(\$253,759.41)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$52,202.75	(\$52,202.75)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$37,044.97	(\$37,044.97)	0.00%
8100 - Non personnel expenses	\$0.00	\$42,964.46	(\$42,964.46)	0.00%
8200 - Facility & equipment expenses	\$0.00	\$290,768.03	(\$290,768.03)	0.00%
8300 - Travel & meetings expenses	\$0.00	\$10,552.91	(\$10,552.91)	0.00%
8400 - Insurance Expense	\$0.00	\$86,964.27	(\$86,964.27)	0.00%
Total - Expense	\$0.00	\$774,256.80	(\$774,256.80)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$37,415.01	(\$37,415.01)	0.00%
Total - Other Expense	\$0.00	\$37,415.01	(\$37,415.01)	0.00%
Net Income	\$0.00	(\$271,106.70)	\$271,106.70	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
Oct 2024

Financial Row	60 Economic Development					
	Economic Development Lending					
		Amount	Amount	Clayton Lake Amount	State Parks Hugo Lake Amount	Raymond Gary Amount
Ordinary Income/Expense						
Income						
4000 - Contribution Revenue	\$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
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00	\$30.00
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4900 - Recoveries from Programs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5000 - Rental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5100 - Program Fee Revenue	\$1,284.61	\$1,430.00	\$3,323.00	\$22,576.31	\$7,295.50	\$34,624.81
5300 - Interest and Dividends	\$2,253.16	\$0.00	\$0.00	\$0.03	\$0.00	\$0.03
5400 - Revenue from other sources	\$0.00	\$6.25	\$0.00	\$42.90	\$0.00	\$49.15
5800 - Special Event Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Income	\$3,537.77	\$1,436.25	\$3,323.00	\$22,649.24	\$7,295.50	\$34,703.99
Expense						
7000 - Grants, contracts, & direct assistance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7200 - Salaries & related expenses	\$0.00	\$0.00	\$4,594.15	\$14,354.14	\$5,469.91	\$24,418.20
7300 - Indirect Cost Pool Expense	\$0.00	\$0.00	\$943.97	\$2,887.60	\$1,150.89	\$4,982.46
7500 - Contract/Consultant Services	\$0.00	\$0.00	\$0.00	\$5,161.16	\$425.00	\$5,586.16
8100 - Non personnel expenses	\$199.00	\$0.00	\$48.39	\$1,399.33	\$92.25	\$1,539.97
8200 - Facility & equipment expenses	\$584.27	\$0.00	\$3,028.34	\$18,120.82	\$2,205.49	\$23,354.65
8300 - Travel & meetings expenses	\$0.00	\$0.00	\$541.37	\$349.09	\$121.58	\$1,012.04
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8700 - Food Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total - Expense	\$783.27	\$0.00	\$9,156.22	\$42,272.14	\$9,465.12	\$60,893.48
Net Ordinary Income	\$2,754.50	\$1,436.25	(\$5,833.22)	(\$19,622.90)	(\$2,169.62)	(\$26,189.49)
Other Income and Expenses						
Other Expense						
8500 - Other Expense	\$0.00	\$0.00	\$207.51	\$2,093.84	\$176.30	\$2,477.65
Total - Other Expense	\$0.00	\$0.00	\$207.51	\$2,093.84	\$176.30	\$2,477.65

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

NAME	AMOUNT (GROSS)
CAPITAL ONE	\$14,369.29
DAVISON FUELS & OIL, LLC	\$9,423.52
DOLLAR GENERAL CHARGE SALES	\$104.68
HOME DEPOT BRC/GECP	\$7,561.67
OFFICE DEPOT BUSINESS CREDIT	\$241.99
TCM BANK NA	\$20,126.83
WAL-MART COMMUNITY BRC	\$5,068.58
Total	\$56,896.56

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

Program	Facility & equipment expenses				Food Expenses			Direct assistance				Non person	
	APPLIANCES & EQUIPMENT - NOT CAPITALIZED	Building/Equip	Tools & Equipment	Total	Food Nutrition Cost	Non -Food, Nutrition Cost	Other Food Expense	Total	Direct Assistance - Other	Events/Meeting Expense	Medical/Dental Supplies	Office/Teaching Supplies	Other/Maintenance Supplies
Administration		\$35.68		\$35.68			\$141.03	\$141.03				\$383.34	\$31.88
Apartments				\$0.00				\$0.00					
Early Head Start				\$0.00				\$0.00					
Early Head Start Child Care				\$0.00				\$0.00			\$190.91	\$182.92	
Early Learning Centers				\$0.00	\$433.52		\$426.18	\$859.70				\$1,894.00	
Head Start				\$0.00	\$61.96	\$110.91	\$191.96	\$364.83		\$1,289.49	\$955.55	\$5,121.76	\$399.24
Healthy Start				\$0.00				\$0.00					
Housing			\$225.00	\$225.00				\$0.00				\$1.00	
State Park Operations	\$1,627.93			\$1,627.93				\$0.00					
TMA				\$0.00				\$0.00				\$629.74	
TRANSIT		\$40.88		\$40.88				\$0.00					
VOCA				\$0.00				\$0.00	\$104.94				
Weatherization				\$0.00				\$0.00					
WRO				\$0.00		\$163.42	\$785.38	\$948.80		\$57.24		\$297.30	\$175.87
Youth Build				\$0.00				\$0.00	\$29.66			\$528.97	
Total	\$1,627.93	\$76.56	\$225.00	\$1,929.49	\$495.48	\$274.33	\$1,544.55	\$2,314.36	\$134.60	\$1,346.73	\$1,146.46	\$9,039.03	\$606.99

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

HS

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$684,597.00	\$478,125.04	\$206,471.96	69.84%
4200 - Miscellaneous Revenue	\$0.00	\$9,906.00	(\$9,906.00)	0.00%
4500 - Federal Revenue	\$3,510,751.00	\$3,559,318.00	(\$48,567.00)	101.38%
Total - Income	\$4,195,348.00	\$4,047,349.04	\$147,998.96	96.47%
Gross Profit	\$4,195,348.00	\$4,047,349.04	\$147,998.96	96.47%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$2,038,720.00	\$1,827,142.50	\$211,577.50	89.62%
7230 - Pension plan contributions	\$202,000.00	\$131,571.50	\$70,428.50	65.13%
7240 - Employee benefits - not pension	\$273,476.00	\$288,120.55	(\$14,644.55)	105.35%
7250 - Payroll taxes, etc.	\$215,533.00	\$147,012.97	\$68,520.03	68.21%
Total - 7200 - Salaries & related expenses	\$2,729,729.00	\$2,393,847.52	\$335,881.48	87.70%
7300 - Indirect Cost Pool Expense	\$536,183.00	\$481,796.90	\$54,386.10	89.86%
7500 - Contract/Consultant Services	\$46,700.00	\$41,346.97	\$5,353.03	88.54%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$13,250.00	\$130,412.64	(\$117,162.64)	984.25%
8120 - Other/Maint Supplies	\$0.00	\$21,052.97	(\$21,052.97)	0.00%
8130 - Telephone & Internet	\$0.00	\$49,067.73	(\$49,067.73)	0.00%
8140 - Postage & shipping	\$0.00	\$722.14	(\$722.14)	0.00%
8150 - Medical/Dental Supplies	\$0.00	\$19,487.14	(\$19,487.14)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$113.90	(\$113.90)	0.00%
8170 - Printing & copying	\$0.00	\$12,932.88	(\$12,932.88)	0.00%
8180 - Fatherhood	\$1,000.00	\$0.00	\$1,000.00	0.00%
Total - 8100 - Non personnel expenses	\$14,250.00	\$233,789.40	(\$219,539.40)	1,640.63%
8200 - Facility & equipment expenses	\$49,208.00	\$163,454.84	(\$114,246.84)	332.17%
8300 - Travel & meetings expenses	\$20,400.00	\$45,494.26	(\$25,094.26)	223.01%
8400 - Insurance Expense	\$23,500.00	\$76,352.55	(\$52,852.55)	324.90%
8700 - Food Expenses	\$46,800.00	\$187,088.06	(\$140,288.06)	399.76%
8800 - In-Kind Expenses	\$684,597.00	\$478,125.04	\$206,471.96	69.84%
Total - Expense	\$4,151,367.00	\$4,101,295.54	\$50,071.46	98.79%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$43,981.00	\$134,518.98	(\$90,537.98)	305.86%
Total - Other Expense	\$43,981.00	\$134,518.98	(\$90,537.98)	305.86%
Net Income	\$0.00	(\$188,465.48)	\$188,465.48	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

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$193,091.00	\$49,073.84	\$144,017.16	25.41%
4500 - Federal Revenue	\$999,189.00	\$854,557.00	\$144,632.00	85.53%
Total - Income	\$1,192,280.00	\$903,630.84	\$288,649.16	75.79%
Gross Profit	\$1,192,280.00	\$903,630.84	\$288,649.16	
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$512,515.00	\$437,867.67	\$74,647.33	85.44%
7230 - Pension plan contributions	\$50,593.00	\$26,072.76	\$24,520.24	51.53%
7240 - Employee benefits - not pension	\$68,696.00	\$68,120.60	\$575.40	99.16%
7250 - Payroll taxes, etc.	\$53,984.00	\$35,401.57	\$18,582.43	65.58%
Total - 7200 - Salaries & related expenses	\$685,788.00	\$567,462.60	\$118,325.40	82.75%
7300 - Indirect Cost Pool Expense	\$134,791.00	\$111,787.11	\$23,003.89	82.93%
7500 - Contract/Consultant Services	\$2,500.00	\$8,672.17	(\$6,172.17)	346.89%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$34,340.00	\$47,704.36	(\$13,364.36)	138.92%
8120 - Other/Maint Supplies	\$0.00	\$4,562.83	(\$4,562.83)	0.00%
8130 - Telephone & Internet	\$0.00	\$6,280.20	(\$6,280.20)	0.00%
8140 - Postage & shipping	\$0.00	\$139.36	(\$139.36)	0.00%
8150 - Medical/Dental Supplies	\$0.00	\$3,849.25	(\$3,849.25)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$583.62	(\$583.62)	0.00%
8170 - Printing & copying	\$0.00	\$2,759.86	(\$2,759.86)	0.00%
8180 - Fatherhood	\$2,500.00	\$0.00	\$2,500.00	0.00%
Total - 8100 - Non personnel expenses	\$36,840.00	\$65,879.48	(\$29,039.48)	178.83%
8200 - Facility & equipment expenses	\$52,500.00	\$34,427.65	\$18,072.35	65.58%
8300 - Travel & meetings expenses	\$39,000.00	\$5,863.47	\$33,136.53	15.03%
8400 - Insurance Expense	\$13,500.00	\$21,381.26	(\$7,881.26)	158.38%
8700 - Food Expenses	\$22,070.00	\$39,675.78	(\$17,605.78)	179.77%
8800 - In-Kind Expenses	\$0.00	\$49,073.84	(\$49,073.84)	0.00%
Total - Expense	\$986,989.00	\$904,223.36	\$82,765.64	91.61%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$42,800.00	\$39,832.26	\$2,967.74	93.07%
Total - Other Expense	\$42,800.00	\$39,832.26	\$2,967.74	93.07%
Net Income	\$162,491.00	(\$40,424.78)	\$202,915.78	-24.88%

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

EHSce 24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$103,115.00	\$688.20	\$102,426.80	0.67%
4500 - Federal Revenue	\$2,267,831.00	\$355,066.00	\$1,912,765.00	15.66%
Total - Income	\$2,370,946.00	\$355,754.20	\$2,015,191.80	15.00%
Gross Profit	\$2,370,946.00	\$355,754.20	\$2,015,191.80	15.00%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$487,412.00	\$110,580.80	\$376,831.20	22.69%
7230 - Pension plan contributions	\$48,741.00	\$9,500.67	\$39,240.33	19.49%
7240 - Employee benefits - not pension	\$65,279.00	\$19,497.63	\$45,781.37	29.87%
7250 - Payroll taxes, etc.	\$41,674.00	\$8,464.06	\$33,209.94	20.31%
Total - 7200 - Salaries & related expenses	\$643,106.00	\$148,043.16	\$495,062.84	23.02%
7300 - Indirect Cost Pool Expense	\$128,189.00	\$28,778.59	\$99,410.41	22.45%
7500 - Contract/Consultant Services	\$1,054,076.00	\$154,984.13	\$899,091.87	14.70%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$56,000.00	\$14,210.79	\$41,789.21	25.38%
8120 - Other/Maint Supplies	\$0.00	\$3,246.77	(\$3,246.77)	0.00%
8130 - Telephone & Internet	\$9,000.00	\$974.88	\$8,025.12	10.83%
8140 - Postage & shipping	\$1,000.00	\$30.35	\$969.65	3.04%
8150 - Medical/Dental Supplies	\$2,000.00	\$281.08	\$1,718.92	14.05%
8170 - Printing & copying	\$7,000.00	\$957.03	\$6,042.97	13.67%
8180 - Fatherhood	\$2,000.00	\$0.00	\$2,000.00	0.00%
Total - 8100 - Non personnel expenses	\$77,000.00	\$19,700.90	\$57,299.10	25.59%
8200 - Facility & equipment expenses	\$50,400.00	\$8,766.09	\$41,633.91	17.39%
8300 - Travel & meetings expenses	\$17,500.00	\$3,139.90	\$14,360.10	17.94%
8400 - Insurance Expense	\$6,000.00	\$0.00	\$6,000.00	0.00%
8700 - Food Expenses	\$6,000.00	\$0.00	\$6,000.00	0.00%
8800 - In-Kind Expenses	\$103,115.00	\$688.20	\$102,426.80	0.67%
Total - Expense	\$2,085,386.00	\$364,100.97	\$1,721,285.03	17.46%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$285,560.00	\$56,371.44	\$229,188.56	19.74%
Total - Other Expense	\$285,560.00	\$56,371.44	\$229,188.56	19.74%
Net Income	\$0.00	(\$64,718.21)	\$64,718.21	0.00%

Funding Entity: Walmart Spark Good Local Grant Program
Walmart Facility: Idabel Store
Amount Requested: \$5000
Application Due Date: October 15, 2024

LIFT CAA's Retired and Senior Volunteer Program is seeking the Board's approval to submit an application to the WalMart facility located in Idabel, Oklahoma for the "Walmart Spark Good Local Grant Program." Through this opportunity, RSVP is requesting a local grant in the amount of \$5,000 for funding to support match requirements for the RSVP program.

Local Grant amounts range from \$250 to the maximum grant of \$5,000. There are three opportunities throughout the year to make an application for local funding. The deadline to apply for this cycle is October 15, 2024.

Eligible Entities/Use of funds

- Funds must benefit the facility's service area:
- Organizations applying must meet one of following criteria:
 - An organization holding a current tax-exempt status as a public charity under Section 501(c)(3) of the Internal Revenue Code, listed on the IRS Master File and conducting activities within the United States, classified as a public charity under Section 509(a)(1), (2) or (3) (Types I or II); and Deed verified.
 - A recognized government entity: state, county or city agency, including law enforcement or fire departments, that are requesting funds exclusively for public purposes and Deed verified.
 - A K-12 public or nonprofit private school, charter school, community/junior college, state/private college or university; or a church or other faith-based organization with a proposed project that benefits the community at large, such as food pantries, soup kitchens and clothing closets and Deed verified.

If selected for an award, the RSVP program will utilize funds for events such as the end of year Volunteer Recognition Event, supplies, travel and other expenses for carrying out the RSVP Program. Funds may also be used for aiding volunteers in their work to meet the needs of the communities in which they serve.

Funding Entity: Walmart Spark Good Local Grant Program
Walmart Facility: Broken Bow Store
Amount Requested: \$5000
Application Due Date: October 15, 2024

LIFT CAA's Retired and Senior Volunteer Program is seeking the Board's approval to submit an application to the WalMart facility located in Broken Bow, Oklahoma for the "Walmart Spark Good Local Grant Program." Through this opportunity, RSVP is requesting a local grant in the amount of \$5,000 for funding to support match requirements for the RSVP program.

Local Grant amounts range from \$250 to the maximum grant of \$5,000. There are three opportunities throughout the year to make an application for local funding. The deadline to apply for this cycle is October 15, 2024.

Eligible Entities/Use of funds

- Funds must benefit the facility's service area:
- Organizations applying must meet one of following criteria:
 - An organization holding a current tax-exempt status as a public charity under Section 501(c)(3) of the Internal Revenue Code, listed on the IRS Master File and conducting activities within the United States, classified as a public charity under Section 509(a)(1), (2) or (3) (Types I or II); and Deed verified.
 - A recognized government entity: state, county or city agency, including law enforcement or fire departments, that are requesting funds exclusively for public purposes and Deed verified.
 - A K-12 public or nonprofit private school, charter school, community/junior college, state/private college or university; or a church or other faith-based organization with a proposed project that benefits the community at large, such as food pantries, soup kitchens and clothing closets and Deed verified.

If selected for an award, the RSVP program will utilize funds for events such as the end of year Volunteer Recognition Event, supplies, travel and other expenses for carrying out the RSVP Program. Funds may also be used for aiding volunteers in their work to meet the needs of the communities in which they serve.



OKLAHOMA
Commerce

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

October 8, 2024

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

Dear Ms. Porter,

The Oklahoma Department of Commerce/ Community Development Services (ODOC/CDS) has received an additional allocation (#6) of our FY'24 Community Services Block Grant (CSBG). The U.S. Department of Health and Human Services/ Office of Community Services (OCS) initially withholds these funds from our annual CSBG award. These funds are awarded to revitalize communities and create opportunities for economic prosperity among low-income individuals and families.

Your agency's current and cumulative allocation is:

1st Allocation	\$31,632.00
2nd Allocation	\$50,347.00
3rd Allocation	\$37,275.00
4th Allocation	\$115,169.00
5th Allocation 1%	\$2,286.00
6th Allocation	\$1,376.00
	\$238,085.00

Please proceed to OKGrants <https://grants.ok.gov> to request a modification to your 2024 CSBG contract and budget.

If you have questions, please contact Shellie Schlegel at Shellie.Schlegel@okcommerce.gov.

Sincerely,

Marshall Vogts, Director
Community Development

**CONTRACT FOR SERVICES
No. 1118 BASE**

This Contract for Services (the “Agreement”) is made and entered into on **October 1, 2024**, by Oklahoma CASA Association, Inc., an Oklahoma nonprofit corporation (“Oklahoma CASA”), and LIFT CASA (“Local Program”), collectively referred to as “Parties” and individually as a “Party.”

WHEREAS, Oklahoma CASA is a member organization which provides funding, technical assistance, training, and networking opportunities to local CASA programs throughout Oklahoma. The Local Program is a Court-Appointed Special Advocate Program, as defined in Title X of the Oklahoma Statutes which fulfills the public purposes of recruiting, screening, training, assigning, supervising, and supporting volunteers to serve as guardians’ ad litem for abused or neglected children in the court system (the “Charitable Purpose”); and

WHEREAS, Oklahoma CASA wishes to further the Charitable Purpose by contracting with the Local Program to provide the support and training necessary for volunteers to serve as guardians’ ad litem for abused or neglected children in the court system in the Local Program’s geographical area; and,

WHEREAS, the Local Program desires to provide the Services in the Local Program’s geographical area, subject to the terms and conditions herein.

NOW THEREFORE, In consideration of the mutual promises set forth in this Agreement, and other good and valuable consideration, the parties agree as follows:

1. Services. Oklahoma CASA hereby engages the Local Program, and the Local Program hereby accepts such engagement, as an independent contractor to provide Services on the terms and conditions set forth in this Agreement.

a) Services Provided by Local Program. The Local Program shall provide Oklahoma CASA with the Services set forth in this Section 1(a). The Local Program shall:

- i. Conduct programming that fulfills the Charitable Purpose;
- ii. Establish and maintain financial records and accounts which document the use and expenditure of all funds received under this Agreement.
- iii. Maintain funding source accounts (i.e. VOCA, OCASAA, United Way, unrestricted) within the organization’s overall accounting system reflecting beginning balance, expenses, deposits, and ending balance. Records reflecting fund based accounting shall be provided as requested and made available for inspection pursuant to Section 8 of this Agreement;
- iv. Comply with the standards set forth in the Memorandum of Understanding for Membership and Funding pursuant to Section 6 of this Agreement;
- v. Comply with the National CASA Standards;
- vi. Ensure all volunteers, staff, and Board members are screened in accordance with National and Oklahoma CASA Standards.
- vii. Ensure each court-appointed special advocate completes a training program in compliance with nationally documented Court-Appointed Special Advocate standards and is approved by the Local Program prior to being assigned a case. Local Program shall submit documentation of training to Oklahoma CASA upon its request;
- viii. Provide evidence of proper payroll tax withholdings to Oklahoma CASA;
- ix. Submit to Oklahoma CASA a report of its financial performance prepared by an

independent certified public accountant approved by the governing body of the Local Program pursuant to Section 4 of this Agreement;

- x. Maintain the Optima Database with all outcomes measurement reports, on a continual basis pursuant to Section 5 of this Agreement;
 - xi. Comply with random desk audits by Oklahoma CASA, which may include requests for documentation regarding governance, fiscal accountability, and overall organizational performance (the "Organizational Assessment") pursuant to Section 7 of this Agreement;
 - xii. Undergo annual quality assurance/performance reviews and review of expenses incurred under this Agreement;
 - xiii. Notify Oklahoma CASA at least 30 days' prior to any change in the Local Program's address or telephone number;
 - xiv. Notify Oklahoma CASA of any change in the chief executive officer and provide documentation that the Board of Directors, in order to fulfill its responsibility to the organization, conducted a due diligent search for the most qualified candidate; and,
 - xv. Provide a minimum of two (2) pre-service volunteer training sessions during the contract period and be able to provide documentation of recruitment for each training.
- b) Oklahoma CASA shall not control the manner or means by which the Local Program or the Local Program's employees perform the Services.
- c) Unless otherwise set forth in Section 2, the Local Program shall furnish, at the Local Program's own expense, the equipment, supplies, and other materials used to perform the Services.

2. Compensation for Services. As full compensation for the Services and the rights granted to the Local Program in this Agreement, Oklahoma CASA shall reimburse the Local Program in accordance with the terms and conditions of this Section 2.

- a) Monthly Reimbursement. Oklahoma CASA shall reimburse the Local Program monthly. Local programs will be notified of total monthly funds available to be reimbursed for October, 2024 by October 10, 2024. This amount will include a base funding amount of \$1,150.00 per month, \$333.33 per month multicounty stipend, and a case reimbursement \$38.53 per case served by volunteers during September, 2024. This basis for funding will continue for each subsequent month during the contract period.
- b) Contingencies for Funding if Applicable: N/A
- c) Reduced Funding: Should the program fall beneath the 15 case threshold for funding during the contract period, the program will be eligible to receive the case reimbursement and half of the allocated base amount.
- d) Reimbursable Expenses. Oklahoma CASA shall reimburse the Local Program in the following categories up to the Monthly Fee, as approved:
- i. Personnel
 - ii. Optima
- e) Requests for Reimbursement. The Local Program shall file electronic requests for reimbursement on a monthly basis using the login information provided by Oklahoma CASA.

The requests for reimbursement will include the total monthly expenses for each category of approved items or services set forth in Section 2(a). Requests for reimbursement are due on the 6th day of the month immediately following the month in which the expenses were incurred.

- f) Backup. Backup for expenditures through this agreement must be uploaded to Coalition Manager at the time of reimbursement request. Backup shall include copies of all invoices and expenditures and monthly report demonstrating use of fund based accounting.
- g) Limited Carry Forward of Monthly Reimbursement. Limited carry forward is 1/12th of estimated funding based on average number of cases served during prior year as provided upon application for funds. If the allowable expenses incurred in a given month are less than the Monthly Disbursement, the Local Program may carry forward its unused balance to the next month. However, the Local Program may not carry forward more than \$2,288.26 (the "Limited Carry Forward") unless it receives prior written approval from Oklahoma CASA.
- h) Suspension or Termination of Reimbursement. Oklahoma CASA may refuse to provide or temporarily suspend distribution of the Monthly Disbursement should any of the following occur:
 - i. If the Local Program does not meet the eligibility for funding criteria or is serving fewer than 10 cases.
 - ii. If a request for reimbursement is more than 60 days delinquent.
 - iii. If data in the Optima Database is more than 60 days delinquent.
 - iv. If the funds have been spent outside of the Charitable Purpose.
 - v. If the Local Program is not a member in good standing with Oklahoma CASA.
 - vi. If the Local Program breaches any provision of this Agreement, including, but not limited to, failure to comply with reporting and/or training requirements listed herein.
- i) Reimbursement Conditional upon Availability of Funding. Payment of the Monthly Fee shall be conditional upon Oklahoma CASA's available funding. Availability of funds is based on projected court fees for the upcoming year. Oklahoma CASA may reduce the Monthly Fee at the sole discretion of Oklahoma CASA.
- j) Training. In addition to payment of the reimbursement, Oklahoma CASA shall use its best efforts, including, without limitation, providing training, technical support, and other resources, to assist the Local Program in using best practices for nonprofit management and increasing the number of CASA volunteers and the number of children being served during the term of this Agreement, including the following:
 - i. all new Executive or Program Directors must complete, in their first year of employment or upon first availability, all sessions of the Directors Best Practices Series Training;
 - ii. all Board Members must individually complete the three (3) required online board trainings provided through Oklahoma CASA, unless otherwise approved by Oklahoma CASA; the program must maintain documentation that each board member completed the training, which will consist of a statement, signed and dated by each individual board member upon completion of the training which is part of their permanent board file;
 - iii. all Executive or Program Directors, advocate supervisory staff and staff who train advocates must attend a session of the Disproportionality and Disparate Outcomes for

Youth Workshop within one (1) year of employment or upon first availability unless otherwise approved by Oklahoma CASA; and,

- iv. All program staff members facilitating advocate training must attend and successfully complete the Training of Facilitator training provided by Oklahoma CASA.

3. Administrative Fee. The Local Program will pay Oklahoma CASA an administrative fee in the amount of six percent (6%) of estimated funding provided to each program upon application based on average case services from Jul 1- June 30 or **\$1,647.55** The Administrative Fee shall cover the cost of administering the funds for the Local Program and other services provided by Oklahoma CASA under this Agreement. The Local Program may not pay the Administrative Fee from funds it receives from Oklahoma CASA. Oklahoma CASA may terminate this Agreement if the Local Program has not paid the Administrative Fee by the end of the then-current term.

4. Financial Performance Report

The Local Program shall obtain a report of its financial performance prepared by an independent certified public accountant approved by the Local Program's governing body (the "Independent CPA.") The report must be completed and submitted to Oklahoma CASA within six months after the end of the Local Program's fiscal year.

- a) The specific level of review required is based on the Local Program's annual expenditures, as set forth below:
 - i. Local Programs with expenditures in excess of \$500,000 shall obtain an Independent CPA to conduct an audit.
 - ii. Local Programs with expenditures between \$250,000 and \$499,000 shall obtain an Independent CPA to conduct a financial review.
 - iii. Local Programs with expenditures less than \$250,000 shall obtain an Independent CPA to conduct a compilation.
- b) Each Local program shall obtain a full audit prepared by an Independent CPA no less than every 3 years.
- c) The Local Program shall ensure the Independent CPA includes in his or her review all monies received by the Local Program, whether from Oklahoma CASA or another source, and a review of internal controls.

5. Demonstration of Financial Management Practices. The Local Program shall demonstrate adherence to sound financial management practices and provide the following:

<u>Category</u>	<u>Requirements</u>	<u>Frequency</u>
Separation of Duties	Financial policies	annually
	Sufficient internal controls by position	annually
	Involving 3 individuals	
	Signed internal controls form	annually
Fund based accounting	MOU with external bookkeeper/CPA	annually
	Backup upload for reimbursement	monthly

6. Outcomes Reporting. The Local Program shall regularly and continually maintain and update the

Optima Database. Data for the previous month shall be complete and updated by the seventh (7th) day of the next month. The Local Program shall participate in all aspects of outcomes measurement data collection, including, but not limited to child surveys, judge surveys, volunteer surveys, volunteer contacts, recommendations, professional changes, hearing information, all community inquiries (“How You Heard” in Optima), etc.

7. **Oklahoma CASA Standards.** Oklahoma CASA shall provide to the Local Program a copy of the Memorandum of Understanding for Membership and Funding prior to or at the commencement of the term of this Agreement. Oklahoma CASA shall provide any changes to the Memorandum of Understanding for Membership and funding to the Local Program within thirty (30) days of the changes being adopted.
8. **Organizational Assessment.** If the local program is found to be operating below 70% capacity as a result of under-utilizing existing staff positions for two consecutive years, the local program may be subject to an organizational assessment conducted by Oklahoma CASA, if applicable. Results may impact future funding from Oklahoma CASA.
9. **Inspection and Retention of Records.** The Local Program shall make available to Oklahoma CASA and any state or federal agency authorized by law all records relating to this Agreement for the purposes of inspecting and copying the records. The Local Program shall retain all records related to this Agreement for a period of seven years after the expiration of this Agreement, or until all audit and litigation matters resulting from this Agreement are resolved, whichever time period is longer.
10. **Relationship of the Parties.** The Local Program is an independent contractor of Oklahoma CASA, and this Agreement shall not be construed to create any association, partnership, joint venture, employee, or agency relationship between the Local Program and Oklahoma CASA for any purpose. Neither Party has the authority (and neither Party shall hold itself out as having authority) to bind the other Party and neither Party shall make any agreements or representations on the others’ behalf.

Without limiting this Section 9, the Local Program will not be eligible to participate in any vacation, group medical or life insurance, disability, profit sharing or retirement benefits, or any other fringe benefits or benefit plans offered by Oklahoma CASA to its employees, and Oklahoma CASA will not be responsible for withholding or paying any income, payroll, Social Security, or other federal, state, or local taxes, making any insurance contributions, including for unemployment or disability, or obtaining workers’ compensation insurance on the Local Program’s behalf. The Local Program shall be responsible for, and shall indemnify Oklahoma CASA against all such taxes or contributions, including penalties and interest. Any persons employed or engaged by the Local Program in connection with the performance of the Services shall be the Local Program’s employees or contractors and the Local Program shall be fully responsible for them and indemnify Oklahoma CASA against any claims made by or on behalf of any such employee or contractor

11. **Intellectual Property Rights.** Oklahoma CASA is and will be the sole and exclusive owner of all right, title, and interest to all the results and proceeds of any materials, including training and oversight materials, provided to the Local Program pursuant to this Agreement, including all patents, copyrights, trademarks (together with the goodwill symbolized thereby), trade secrets, know-how, and other confidential or proprietary information, and other intellectual property rights (collectively “Intellectual Property Rights”) therein.
12. **Confidentiality.** The Local Program may have access to information that is treated as confidential and proprietary by Oklahoma CASA

- a) Definition of Confidential Information. Confidential Information includes, without limitation the existence and terms of this Agreement, trade secrets, technology, and information pertaining to business operations and strategies, customers, donors, pricing, marketing, finances, sourcing, personnel, or operations of Oklahoma CASA, its affiliates, or their suppliers or customers, in each case whether spoken, written, printed, electronic, or in any other form or medium. Confidential Information shall not include information that is or becomes generally available to the public other than through your breach of this Agreement or is communicated a Local Program by a third party that had no confidentiality obligations with respect to such information.
- b) Treatment of Confidential Information. The Local Program agrees to treat all Confidential Information as strictly confidential, not to disclose Confidential Information or permit it to be disclosed, in whole or part, to any third party without the prior written consent of Oklahoma CASA in each instance, and not to use any Confidential Information for any purpose except as required in the performance of the Services. The Local Program shall notify Oklahoma CASA immediately in the event the Local Program becomes aware of any loss or disclosure of any Confidential Information.

Nothing herein shall be construed to prevent disclosure of Confidential Information as may be required by applicable law or regulation, or pursuant to the valid order of a court of competent jurisdiction or an authorized government agency, provided that the disclosure does not exceed the extent of disclosure required by such law, regulation, or order. The Local Program agrees to provide written notice of any such order to an authorized officer of Oklahoma CASA immediately upon receiving such order, but in any event sufficiently in advance of making any disclosure to permit Oklahoma CASA to contest the order or seek confidentiality protections, as determined in Oklahoma CASA's sole discretion.

13. Term. The term of this Agreement shall begin on **October 1, 2024** and shall continue until **September 30, 2025**, unless otherwise terminated pursuant to Section 13 of this Agreement.

14. Termination. Either Party may terminate this Agreement without cause upon 30 days written notice to the other Party.

- a) Termination for Cause. Oklahoma CASA may terminate this Agreement for cause if the Local Program fails in any material respect to comply with any provision of this Agreement, and the failure continues for a period of 30 days after Oklahoma CASA gives notice to the Local Program setting forth the alleged breach.
- b) Effect of Termination. The Local Program shall not be entitled to reimbursement of any expenses incurred after termination of this Agreement. The Local Program shall not be entitled to reimbursement of any expenses incurred after termination of this Agreement or if at any time the local program falls out of compliance with the terms of this Agreement, including, but not limited to, failure to provide requested documentation through random desk audits

15. Representations and Warranties.

- a) Local Program Representations and Warranties. The Local Program represents and warrants to Oklahoma CASA that:
 - i. the Local Program has the right to enter into this Agreement, to grant the rights

granted herein, and to perform fully all of the Local Program's obligations in this Agreement;

- ii. the Local Program entering into this Agreement with Oklahoma CASA and performance of the Services do not and will not conflict with or result in any breach or default under any other agreement to which the Local Program is subject;
- iii. the Local Program affirms that all information, documentation, and representations submitted or made in connection with this Agreement are true and correct to the best of its knowledge; the Local Program affirms that neither the Local Program's board members, officers, members, employees, volunteers, nor anyone subject to the Local Program's direction or control, has paid, given, or donated, or agreed to pay, give, or donate to any officer or employee of Oklahoma CASA, the Office of the Attorney General, or the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this Agreement;
- iv. no portion of the funds provided to the Local Program under this Agreement shall be used for any political activity or to further the election or defeat of any candidate for public office; no portion of the funds shall be used for lobbying activities or fundraising; and,
- v. the Local Program is in compliance with all applicable federal, state, and local laws, and all licenses, certifications, and regulations.

b) Oklahoma CASA Representations and Warranties. Oklahoma CASA hereby represents and warrants to the Local Program that:

- i. Oklahoma CASA has the full right, power, and authority to enter into this Agreement and to perform its obligations hereunder; and,
- ii. the execution of this Agreement by its representative whose signature is set forth at the end hereof has been duly authorized by all necessary corporate action.

16. Indemnification. The Parties shall indemnify and hold harmless the other Party and its directors, officers, members, employees, volunteers, agents, and affiliates from and against any and all liability, including reasonable attorney's fees, that may arise in connection with the failure by either Party to perform its obligations in accordance with this Agreement or arising out of or caused by negligent or intentional acts or omissions of either Party or any director, officer, member, employee, volunteer, agent, or affiliate of either Party.

17. Assignment. The Local Program shall not assign any rights, or delegate or subcontract any obligations, under this Agreement. Assignment in violation of the foregoing shall be deemed null and void.

18. Governing Law, Jurisdiction, and Venue. This Agreement and all related documents including all schedules attached hereto, and all matters arising out of or relating to this Agreement, whether sounding in contract, tort, or statute are governed by, and construed in accordance with, the laws of the State of Oklahoma (including its statutes of limitations), without giving effect to the conflict of laws provisions thereof to the extent such principles or rules would require or permit the application of the laws of any jurisdiction other than those of the State of Oklahoma. Venue shall be in Oklahoma County, Oklahoma.

19. Miscellaneous.

- a) Entire Agreement. This Agreement, together with any other documents incorporated herein by reference and related exhibits and schedules, constitutes the sole and entire agreement of

the Parties to this Agreement with respect to the subject matter contained herein, and supersedes all prior and contemporaneous understandings, agreements, representations, and warranties, both written and oral, with respect to such subject matter.

- b) Amendments. This Agreement may only be amended, modified, or supplemented by an agreement in writing signed by each party hereto, and any of the terms thereof may be waived, only by a written document signed by each party to this Agreement or, in the case of waiver, by the party or parties waiving compliance.
- c) Invalidity. If any term or provision of this Agreement is invalid, illegal, or unenforceable in any jurisdiction, such invalidity, illegality, or unenforceability shall not affect any other term or provision of this Agreement or invalidate or render unenforceable such term or provision in any other jurisdiction.
- d) Execution. This Agreement may be executed in multiple counterparts and by facsimile signature, each of which shall be deemed an original and all of which together shall constitute one instrument.

No funds will be disbursed to the Local Program until this Agreement is signed by both the Local Program's authorized official and Oklahoma CASA's Chief Executive Officer and returned to the Oklahoma CASA office.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

LOCAL PROGRAM:

LIFT CASA

Name of Local Program

73-0772321

Federal Identification Number

DocuSigned by:

Becky Reynolds

9/26/2024

Authorized Signer (sign)

Date

OKLAHOMA CASA:

OKLAHOMA CASA ASSOCIATION, INC.

Signed by:

Sheryl L. Marseilles

9/26/2024

Name: Sheryl Marseilles

Title: Chief Executive Officer

Funding Entity: Oklahoma Department of Education
Funding Opportunity: Child and Adult Care Food Program Grant
Award Amount: \$118,865.24
Agency Program: Early Learning Centers



**CACFP Message - Welcome to Child Nutrition - Child & Adult
Care Food Program (CACFP).**

Alerts for user: ancraeven

Alerts: (Default view shows New and Open Alerts)

View New/OpenView NewView Closed					
Select	Alert_Status	Alert_Reason	Open Date	View Date	Closed Date
Select	New	App Approved	10/03/2024		
Select	New	Incomplete App	10/02/2024		
Select	New	Mass Alert	09/04/2024		
Select	In Process	App Approved	09/28/2023	10/06/2023	
Select	In Process	App Approved	11/14/2022	12/27/2022	
1 2 3 4 5 6					

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

Funding is provided to the Oklahoma State Department of Education (the state sponsoring agency) from the United States Department of Agriculture based on claims submitted by program participants. LIFT Community Action Agency's Early Learning Centers are requesting the Board's approval to accept an award from the Oklahoma Department of Education in the amount of \$118,865.24 for the Child and Adult Care Food Program. These funds will provide an opportunity to be reimbursed for a portion of the costs of meals and snacks served to enrolled children at the four Early Learning Centers (Antlers, Broken Bow, Hugo, Idabel).

Walmart Spark Good Local Grant Award to LIFT RSVP from Hugo Walmart
Amount: \$1,500

From: no-reply-sparkgoodgrants@es.relay.walmart.com <no-reply-sparkgoodgrants@es.relay.walmart.com> on behalf of Spark Good Grants Team
<no-reply-sparkgoodgrants@es.relay.walmart.com>

Sent: Tuesday, October 8, 2024 7:04 PM

To: Becky Reynolds <becky.reynolds@liftca.org>

Subject: Spark Good Local Grant to Facility #49 Status Update - Application ID 91804780

Spark Good Local Grant to Facility #49 Status Update – Application ID 91804780

Dear Rebecca,

Congratulations! Your Spark Good Local Grant request to Facility #49 has been approved, and you will be receiving a \$1500 grant.

The grant funds will be sent via electronic payment to the bank account set up with JPM. Please save the payment ID #874369428392698 for future use.

We encourage you to share the positive impact this grant will have on our community. For easy reference, our [Spark Good Tools & Resources](#) can be found under Promotional Materials. This provides logos and helpful tips for acknowledging Walmart and Sam's Club in the best possible way for this grant.

Visit Walmart.com/nonprofits to discover even more ways Spark Good may be able to support your organization.

Once again, congratulations on your grant, and thank you for your valuable contributions to the community.

Sincerely,

The Spark Good Team

McCRAW OIL COMPANY INCORPORATED
KIDS AND COLLEGE ACCOUNT
PO BOX 220 PH #903-583-7481
BONHAM, TX 75418

122

88-858/1119
01

10/14/2024

Date

CHECK ARMOR
FRAUD PROTECTION

Pay to the
Order of

Lift Community Action Agency

Two thousand five hundred & no/100

\$ 2,500.00

Dollars

Photo
Safe
Deposit®
Details on back



CapTex

BANK

105 Hamilton
Trenton, TX 75490
903-889-2235

Trenton, Leonard, Bonham, Melissa, Farmersville, Ft Worth

For

Alie Quent

MP

⑆111908583⑆ ⑈60 2375 8⑈ 0122

10/25/24

NF CASA

LIFT Community Action, Inc.

CSBG-2024-LIFT CAA-00197

Contract Part I: 19394 CSBG 24

FAIN #: 2401OKCOSR

UEI #: 0

FEI #:

730772321

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

Contracting Agency:	Oklahoma Department of Commerce State of Oklahoma (ODOC)
Contractor:	LIFT Community Action Agency, Inc.
Contract Title:	ODOC Community Services Block Grant
Contract Number:	19394 CSBG 24
Federal Amount:	\$238,085.00
Match Amount:	\$0
Contract Amount:	\$238,085.00
Research and Development:	Not R&D Related
Indirect Cost Rate:	28.00
Grant Award Amount - This Action:	\$238,085.00
Total Committed:	\$238,085.00
Total Obligated:	\$238,085.00
Source:	U.S. Department of Health and Human Services Community Services Block Grant Act of 1981, as amended. (42 USC §§9901, et seq.; P.L. 97-35, Title VI, Subtitle B). Catalog of Federal Domestic Assistance (CFDA) Number 93.569
Project Funding Period:	January 1, 2024 through September 30, 2025
Federal Award Period:	October 1, 2023 through September 30, 2025

Summary of Project

FY24 Community Service Block Grant

Budget Summary

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

LIFT Community Action, Inc.

CSBG-2024-LIFT CAA-00197

Contract Part I: 19394 CSBG 24

Submit Requisitions to:
Community Development

Oklahoma Department of
Commerce
900 North Stiles
Oklahoma City, OK
73104-3234

AGREEMENT
COMPONENTS:

Issue Payment To:
LIFT Community Action
Agency, Inc.
209 N 4th St

Hugo, Oklahoma 74743

Part I - Summary and
Signatures

Part II - Terms and
Conditions
Certification Regarding
Lobbying

SPECIAL CONDITIONS:

SIGNATURES – EXECUTION OF CONTRACT

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

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

Executed by:
LIFT Community Action
Agency, Inc.
Sheree Ensley

Executed by:
Oklahoma Department of
Commerce

Marshall Vogts

Signature of Authorized
Official
10/15/2024
Date

Signature of Authorized
ODOC Official
10/16/2024
Date

Funding Entity: Oklahoma Department of Education
Funding Opportunity: Child and Adult Care Food Program Grant
Award Amount: \$688,050
Agency Program: Head Start and Early Head Start Programs

Type of Expense	Amount Projected
1. CACFP Administrative Labor	42,000.00
2. CACFP Administrative Supplies	0.00
3. CACFP Administrative Expenses	0.00
4. CACFP-Related Travel	4,600.00
5. CACFP-Related Training/Education	0.00
6. Indirect Costs	49,000.00
7. Other Administrative Services	0.00
8. Food Service Salaries/Benefits	220,000.00
9. Food Service Rent/Utilities/Janitorial	0.00
10. Food Service Equipment	0.00
11. Food and Milk Purchases	357,056.00
12. CACFP Food-related Expenses	21,600.00
13. Miscellaneous/Other Operational CACFP Costs	3,000.00
Total Projected CACFP Expenditures	688,050.00

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

Funding is provided to the Oklahoma State Department of Education (the state sponsoring agency) from the United States Department of Agriculture based on claims submitted by program participants. LIFT Community Action Agency's Head Start/Early Head Start Programs are requesting the Board's approval to accept an award from the Oklahoma Department of Education in the amount of \$688,050 for the Child and Adult Care Food Program. These funds will provide an opportunity to be reimbursed for a portion of the costs of meals and snacks served to enrolled children in the 28 Head Start classrooms and three Early Head Start centers. The total requested is an estimate of food, milk, food-related supplies, and cooks' salaries/benefits needed for food service operations under the programs.

**Walmart Spark Good Local Grant Award to LIFT RSVP from Broken Bow Walmart
Amount: \$1,000**

From: no-reply-sparkgoodgrants@es.relay.walmart.com <no-reply-sparkgoodgrants@es.relay.walmart.com> on behalf of Spark Good Grants Team <no-reply-sparkgoodgrants@es.relay.walmart.com>

Sent: Monday, October 14, 2024 2:26 PM

To: Becky Reynolds <becky.reynolds@liftca.org>

Subject: Spark Good Local Grant to Facility #117 Status Update - Application ID 91810467

Spark Good Local Grant to Facility #117 Status Update – Application ID 91810467

Dear Rebecca,

Congratulations! Your Spark Good Local Grant request to Facility #117 has been approved, and you will be receiving a \$1000 grant.

The grant funds will be sent via electronic payment to the bank account set up with JPM. Please save the payment ID #879387895421185 for future use.

We encourage you to share the positive impact this grant will have on our community. For easy reference, our [Spark Good Tools & Resources](#) can be found under Promotional Materials. This provides logos and helpful tips for acknowledging Walmart and Sam's Club in the best possible way for this grant.

Visit Walmart.com/nonprofits to discover even more ways Spark Good may be able to support your organization.

Once again, congratulations on your grant, and thank you for your valuable contributions to the community.

Sincerely,

The Spark Good Team



OKLAHOMA

OKLAHOMA DEPARTMENT OF TRANSPORTATION

Office of Mobility & Public Transit

200 N.E. 21st Street
Oklahoma City, OK 73105-3204
www.odot.org

October 18, 2024

Ms. Rebecca Reynolds, Executive Director
Lift Community Action Agency, Inc.
209 N 4th
Hugo, OK 74743

Attention: Jeannie McMillin

Dear Rebecca Reynolds:

Enclosed for your files is a fully executed contract between the Oklahoma Department of Transportation and the Lift Community Action Agency, Inc. The purpose of this contract is to provide financial assistance for the Rural Area Formula Grant Program (Section 5311) for fiscal year 2025. You are authorized to begin work on the referenced project effective October 1, 2024. Specifics of the project agreement are outlined in the enclosed executed contract.

If you have any questions, please contact me at (405) 882-7069.

Sincerely,

Justin Gregory, Project Manager
Office of Mobility & Public Transit

**STATE OF OKLAHOMA
DEPARTMENT OF TRANSPORTATION
SECTION 5311 - FORMULA GRANTS FOR RURAL AREAS
FEDERAL FISCAL 2024 FUNDING, 2025 PROGRAM YEAR
PROJECT NO: FTA5311-TP-24(244), JOB PIECE NO: 25932(20)**

**CFDA #20.509
CHOCTAW COUNTY
AGREEMENT NO: RT2024-11**

This Agreement is entered into between the Oklahoma Department of Transportation, hereinafter called the **"DEPARTMENT"**, acting for and on behalf of the State of Oklahoma, the Governor's designee for the administration of 49 United States Code (U.S.C.) § 5311 formula grants for rural areas, and the **LIFT COMMUNITY ACTION AGENCY, INC.**, hereinafter referred to as **"CONTRACTOR"** for the purpose of providing public transportation service to be known as **LIFT TRANSIT** hereinafter referred to as **"TRANSIT AGENCY"**, and subject to the following terms and conditions:

WITNESSETH:

WHEREAS, Public Law 114-94 allowed for the implementation of the Fixing America's Surface Transportation Act (FAST Act); and

WHEREAS, Section 5311 authorizes the apportionment of funds for public mass transportation in rural and small urban areas to enhance access in those areas for purposes such as health care, shopping, education, recreation, public services and employment by encouraging the maintenance, development, improvement and use of passenger transportation systems, and provides further that funds be made available through the State of Oklahoma to the TRANSIT AGENCY approved by the Federal Transit Administration, hereinafter referred to as "FTA"; and,

WHEREAS, 49 U.S.C. § 5311(b)(3) authorizes the Secretary "to make grants and contracts for transportation research, technical assistance, training and related support services in other than urbanized areas." The Rural Transportation Assistance Program (RTAP) provides funding to assist in the designation and implementation of training and technical assistance projects and other support services to meet the needs of transit operations in nonurbanized areas.

WHEREAS, the DEPARTMENT has been designated to administer the Section 5311 Program within the State of Oklahoma; and,

WHEREAS, the CONTRACTOR is an approved subrecipient of funds for implementing a Section 5311 Program; and,

WHEREAS, the DEPARTMENT is charged with the duty of administering and coordinating the approved program with the subrecipient agency, it is therefore deemed necessary to enter into an Agreement with the subrecipient agency to provide for the operation of a public transportation system in the designated areas.

NOW THEREFORE, for and in consideration of the mutual covenants herein contained, the parties hereto agree as follows:

SECTION 1: PURPOSE OF AGREEMENT

The purpose of this Agreement is to state the terms, conditions and mutual understanding of the parties as to the manner in which the CONTRACTOR will provide transportation services to the general public under 5311.

The DEPARTMENT will also make available funds to the CONTRACTOR for training and technical assistance under 49 U.S.C. 5311 (b)(3).

SECTION 2: PROGRAM SCOPE

In addition to the terms and conditions as set forth in this Agreement, the CONTRACTOR will undertake and complete the program as specified in its program year 2025 approved Section 5311 Federal Assistance application as well as the CONTRACTOR's 2024 Certification and Assurances filed with the DEPARTMENT on April 1, 2024.

SECTION 3: RURAL TRANSIT ASSISTANCE PROGRAM

The DEPARTMENT will develop a technical assistance program in conjunction with the administration of the section 5311 program. The program will meet all FTA requirements as outlined in FTA C 9040.1 as amended. Available funds will be used for technical assistance, training, research, and related support activities. Eligible and pre-approved activities will be reimbursed to the CONTRACTOR by the DEPARTMENT.

SECTION 4: TIME FOR PERFORMANCE

Time is considered of the essence in the performance of the services required by this Agreement and as further defined in the "EXHIBIT B". The CONTRACTOR will commence and complete contracted services through the TRANSIT AGENCY with all practicable dispatch, in a sound, economical and efficient manner for the duration of the Agreement period, to commence on the first day of October 2024 and effective through the thirtieth day of September 2025. Activities by the CONTRACTOR or the CONTRACTOR'S Subcontractor prior to a written notice to proceed from the DEPARTMENT are not eligible for reimbursement unless prior written approval is provided by the DEPARTMENT. Unused grant funding allocation balance at the end of the contractual period will go into a general fund to be reallocated to eligible subrecipients.

It is understood and agreed between the parties hereto that the DEPARTMENT is subject to certain funding restrictions which prevent the DEPARTMENT from making a commitment that obligates the DEPARTMENT to pay any funds beyond the aforementioned Agreement period. Accordingly, this Agreement shall be reevaluated and considered for renewal each successive year.

The DEPARTMENT will initiate the closeout of this agreement within (ninety) 90 days after all funds are expended, all work activities for the project are completed, or at the end of the agreement period as defined.

Subsequent to the annual reevaluation of this Agreement, the parties hereto may, by supplemental Agreement, extend the contracted services for an additional one (1) year period. Any supplemental Agreement shall provide for such amendments to the terms of this Agreement as required and shall be executed with the same formality as this Agreement.

SECTION 5: COMPENSATION

This Agreement is subject to a federal aid financial assistance agreement between the DEPARTMENT and the US Department of Transportation. It is mutually understood the DEPARTMENT is performing an administrative function as an agent of the Federal government under the Section 5311 Program. No State funds are available for use by the CONTRACTOR for cost overruns or any item set forth in this Agreement.

SECTION 6: COST OF PROGRAM

The DEPARTMENT agrees to receive and dispense to the CONTRACTOR available federal funds for services performed by the TRANSIT AGENCY, in an amount not to exceed **\$432,061.00 (FOUR HUNDRED THIRTY-TWO THOUSAND SIXETY ONE DOLLARS) for eligible Section 5311 activities and \$5,000.00 (FIVE THOUSAND DOLLARS) for eligible Rural Transit Assistance Program (RTAP) activities.** The balance of RTAP annual funds made available to the CONTRACTOR will not carry over to the next contractual period, but will be relinquished into the general RTAP fund.

Eligible Section 5311 pre-approved activities will be reimbursed to the TRANSIT AGENCY by the DEPARTMENT. Compensation for services performed under this Agreement will be based on direct and indirect actual accountable costs incurred by the TRANSIT AGENCY with a maximum federal participation of:

- Eighty percent (80%) for capital acquisitions and Preventive Maintenance;
- Eighty-five percent (85%) for the acquisition of vehicles and associated accessories for purposes of complying with or maintaining compliance with American with Disabilities Act of 1990 (ADA) or the Clean Air Act (CCA).
- Eighty percent (80%) for project administration expenditures;
- Fifty percent (50%) for net operating expenditures as defined by FTA Circular 9040.1, as amended.
- One Hundred percent (100%) for Rural Transit Technical Assistance (RTAP) Scholarships

Costs shall not exceed limits set by State law and shall conform to the U.S. DOT regulations, "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards," 2 C.F.R. part 200. Private "For-Profit" entities may obtain indirect cost rates from the Defense Contract Audit Agency (DCAA) web-site at: <http://www.dcaa.mil>

Monies made available from fares charged by the TRANSIT AGENCY shall be applied to the operating costs prior to computing the fifty percent (50%) federal share.

The CONTRACTOR shall apply all profits generated by any business or activity, which has been established pursuant to the TRANSIT AGENCY, toward meeting their federal local match requirements, or promoting, enhancing, or otherwise improving their services. Such business or activities include, but are not limited to, charter services and advertising. Deficits incurred by such businesses or activities shall not be eligible for Section 5311 reimbursement.

The CONTRACTOR hereby certifies that all items included in direct costs have been excluded from the indirect, and that indirect costs are certified annually and direct costs are part of the contractor's cost allocation plan.

10/21/2024 11:05 AM

LD Operating Acct

XXXXXX0375

Amount: \$500.00

Statement Description: POTTS FAMILY FOUPPD LIFT COMMUNITY ACTIOCONS PAY ACH Credit

Posted Date: 10/9/2024

Type: Credit

Status: Posted



OKLAHOMA

OKLAHOMA DEPARTMENT OF TRANSPORTATION

Office of Mobility and Public Transit

200 N.E. 21st Street
Oklahoma City, OK 73105-3204
www.odot.org

October 28, 2024

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

Attention: Jeannie McMillin

Dear Mrs. Reynolds,

Enclosed for your files is a fully executed contract between the Oklahoma Department of Transportation (ODOT) and LIFT Community Action Agency INC.. The purpose of this contract is to provide state financial assistance through the Public Transit Revolving Fund for state fiscal year 2025. You are authorized to begin work on the referenced project effective November 1, 2024. Specifics of the project agreement are outlined in the enclosed executed contract.

Your first invoice will be sent out after November 1, 2024. The second invoice will be sent out to you February 1, 2025 and the third invoice will be sent out June 1, 2025.

If you have any questions, please contact me at (405) 882-7069.

Sincerely,

A handwritten signature in black ink, appearing to read "Justin Gregory".

Justin Gregory, Project Manager
Office of Mobility & Public Transit

**STATE OF OKLAHOMA
DEPARTMENT OF TRANSPORTATION
STATE PUBLIC TRANSIT REVOLVING FUND PROGRAM
STATE FISCAL 2025
PROJECT NO: STPTRF-9025(569), JOB PIECE NO. 26093(20),
CHOCTAW COUNTY
AGREEMENT NO. RF2025-13**

This Agreement made and entered into by and between the Oklahoma Department of Transportation, hereinafter called the "**DEPARTMENT**", acting for and on behalf of the State of Oklahoma, the Governor's designee for the administration of the State Public Transit Revolving Fund and the **LIFT Community Action Agency**, hereinafter referred to as the "**AGENCY**", for the purpose of providing financial assistance pursuant to the Public Transit Revolving Fund, Section 4031 of Title 69 of the Oklahoma Statutes, as amended, hereinafter referred to as the "**FUND**", and subject to the following terms and conditions. The above stated parties to this contract will hereinafter be referred to collectively, as the **PARTICIPANT** or **PARTICIPANTS**.

WITNESSETH:

WHEREAS, Section 4031 of Title 69 of the Oklahoma Statutes created a revolving fund for the DEPARTMENT designated as the "Public Transit Revolving Fund" for the purpose of establishing, expanding, improving and maintaining rural and urban public transportation services; and,

WHEREAS, \$10,750,000.00 has been allocated to the FUND for establishing, expanding, improving and maintaining rural and urban public mass transportation services; and,

WHEREAS, Ninety-five percent or \$10,212,500.00 of the aforementioned FUND is available to existing public mass transportation programs; and,

WHEREAS, Eligible entities shall be defined as those entities receiving federal financial assistance through the Federal Transit Administration's Block Grant for Urbanized Areas and Formula Grant Program for Areas Other Than Urbanized Areas, 49 U.S. C., Sections 1607a and 1614, respectively, and other public mass transportation programs provided by entities, municipalities, and community action programs which have submitted an audited financial statement showing total reported vehicle revenue mileage for the prior year to the **DEPARTMENT**; and,

WHEREAS, The DEPARTMENT has determined that the AGENCY is an eligible entity to participate in the aforementioned FUND; and,

WHEREAS, The **DEPARTMENT** desires to distribute said FUND to eligible existing public mass transportation providers. The **PARTICIPANTS** hereto agree as follows:

SECTION 1: PURPOSE OF AGREEMENT

The purpose of this Agreement is to state the terms, conditions and mutual understanding of the parties as to the manner in which the distribution of monies from the State Public Transit Revolving Fund is to be carried out.

SECTION 2: PROGRAM SCOPE

The funding allocated from the Public Transit Revolving Fund by the DEPARTMENT is budgeted for the purpose of establishing, expanding, improving and maintaining rural and urban public mass transportation service; available funds may also be used for local share or matching funds for the purpose of federal capital or operating grants. Prior to the allocation of funds from the Public Transit Revolving Fund, each eligible entity desiring monies from the Public Transit Revolving Fund shall provide to the Department, a proposed budget outlining the proposed use of the monies for the corresponding fiscal year. Any eligible entity not submitting a proposed budget shall be deemed to waive any claim to available funds from the Public Transit Revolving Fund for the corresponding fiscal year. All funds distributed among the eligible entities shall be audited to ensure compliance with applicable law and the latest available audited financial statement shall be provided to the DEPARTMENT.

Eligible entity receiving funds from the Public Transit Revolving Fund shall expend a minimum of fifty percent (50%) of their allocated funding for services for the Elderly and the Disabled. Available program funds shall not be subject to the Central Purchasing Act, Section 85.1 et seq. of Title 74 of the Oklahoma Statutes. However, any equipment purchased with available funds, shall be subject to the Central Purchasing Act added by Laws 1990, c. 250, § 3, operative July 1, 1990 as amended.

SECTION 3: TIME FOR PERFORMANCE

This Agreement shall be in effect for a period, which will commence on the date indicated that the DEPARTMENT has executed this Agreement and extend through June 30, 2025. It is understood and agreed upon between the parties hereto that the DEPARTMENT is subject to certain funding restrictions which prevent the DEPARTMENT from making a commitment that obligates the DEPARTMENT to pay any funds beyond the aforementioned Agreement period.

SECTION 4: COMPENSATION

The DEPARTMENT agrees to distribute said monies to the AGENCY on the basis of three billings. The first billing of \$44,985.00 shall be payable on or after November 1, 2024. The second billing shall be for \$44,985.00, payable on or after February 1, 2025. The final payment shall be for \$44,986.00 and shall be due on or after June 1, 2025. The maximum amount of funds available to the AGENCY under this Agreement shall not exceed ONE HUNDRED THIRTY FOUR THOUSAND NINE HUNDRED FIFTY SIX DOLLARS (\$134,956.00). Unused funds at the end of the contract period will go back into the general Revolving fund to be redistributed the following fiscal year.

Compensation for services performed under this Agreement will be based on the number of vehicle revenue miles of service provided, using the AGENCY's actual audited vehicle revenue mileage records. A vehicle revenue mile shall be defined as a mile operated by vehicles available for public transportation services. Deadhead miles shall not be eligible for reimbursement and are defined as miles traveled while moving a revenue vehicle in other than revenue service. A revenue vehicle shall be defined as a vehicle used to provide public mass transportation services for which remuneration is normally required. The DEPARTMENT shall not be obligated to provide funding to the

AGENCY beyond the limits of funds available in the FUND for the corresponding fiscal year.

The DEPARTMENT will make three payments to the AGENCY based upon properly prepared invoices supplied by the DEPARTMENT and executed by the AGENCY.

The mileage upon which payment is to be made shall be that mileage reported by the AGENCY to the United States Secretary of Transportation, as required by U.S.C., Section 1611, as amended, or as reported on the DEPARTMENT's approved data intake form for the previous year. Other eligible public mass transit services provided by entities, municipalities, and community action programs shall submit an audited financial statement showing total reported mileage for the prior year to the DEPARTMENT as described in the Program Scope section of this agreement. The DEPARTMENT, based on evidence provided by the applicant, shall determine if any entity meets the criteria of being a public transit program and therefore to take part in the FUND. The vehicle revenue miles for all eligible entities shall be added together to form a total. This total vehicle revenue mileage shall be divided into the total dollars available in the FUND to arrive at a per mile rate to be used to calculate the maximum amount of funds available to each eligible entity for the fiscal year.

SECTION 5: CHANGE MODIFICATIONS

No changes or alterations, modification or amendment of any term or condition of this Agreement shall be effective unless reduced to writing and executed with same formalities that are observed in the execution of this Agreement.

SECTION 6: GOVERNING LAWS AND REGULATIONS

This Contract shall be governed and implemented in accordance with the laws of the State of Oklahoma and the applicable rules, regulations, policies, and procedures of the Oklahoma Transportation Commission. Venue for any action to construe or have enforced any provision of this Contract shall be in the District Court of Oklahoma County, State of Oklahoma.

SECTION 7: DISPUTE RESOLUTION

The parties hereto have entered into this Contract in the State of Oklahoma and the laws of the State of Oklahoma shall apply. The parties agree to bargain in good faith in direct negotiation to achieve resolutions of any dispute and, if such efforts are unsuccessful, to retain a neutral mediation service to mediate the dispute prior to filing court action. Mediation shall be conducted in the Oklahoma City area and the costs of such mediation shall be borne equally by the parties. If mediation is not successful, venue for any action brought to enforce the terms of this Contract shall be Oklahoma County, State of Oklahoma. Each party shall bear any costs and attorney fees incurred by that party in such litigation.

Category/Grant	Totals
Revenue	
Donations	3,000.00
Corporate/Foundation	54,247.00
State Contract (LOAN)	4,463,054.14
State Grant	134,557.32
Federal Contract	1,443,580.00
Federal Grants	14,965,530.26
Recoveries	3,992,828.19
Rental	625,834.00
Program Fees	2,223,825.12
Interest	84,000.00
Inkind	1,503,745.54
Total Revenue	29,494,201.57
Expenses	
Salaries	9,064,765.83
Fringe	2,984,286.74
Indirect	2,123,828.19
Contractual	4,230,738.47
Supplies (non personnel oper)	1,103,884.68
Facility & Equipment	1,221,564.01
Travel	690,083.76
Training	171,574.34
Insurance	2,274,886.21
Food	1,616,620.00
Other	2,472,867.49
Inkind	1,503,745.54
Total Expenses	29,458,845.26

LIFT Community Action Agency, Inc.
Executive Director/President/Chief Executive Officer

SUCCESSION PLAN

**Guideline for the Appointment of an Acting Executive Director in the Event of an
Unplanned Absence of the Incumbent**

1. Rationale

The Executive Director position in a nonprofit organization is a central element in the organization's success. Therefore, ensuring that the functions of the Executive Director are well-understood and even shared among the executive team and senior staff is important to ensure organizational stability and leadership continuity in the event of unplanned and unexpected change. This kind of risk management is equally helpful in facilitating a smooth leadership transition when it is predictable and planned.

The purpose of this plan is to ensure the continuous coverage of duties critical to the ongoing successful operations of LIFT Community Action Agency, Inc., hereafter known as "LCAA." The Board of Directors is adopting policies and procedures for the temporary appointment of an **Acting Executive Director** in the event of an unplanned and extended absence of the Executive Director. The Board Chair, or Board Vice Chair in the absence of the Board Chair, may determine the appropriate time to initiate the implementation of this plan.

While the Board of Directors acknowledges that such an absence is highly improbable and certainly undesirable, they believe that due diligence in exercising executive-level management functions requires that it has a succession plan in place. It is expected that this plan will ensure continuity in the administration of the organization's day-to-day programs and operations, management of external relationships and supervision of staff and finances.

2. Priority functions of the Executive Director position at LCAA

The full Executive Director job description is attached (See Attachment 1). Of the duties listed in the job description, the following are considered to be examples of the key functions of the Executive Director, and therefore, have a corresponding temporary staffing strategy. Functions to be covered by an Acting Executive Director are attached. (See Attachment 2: Succession Plan Detail: Executive Director)

The positions assigned in the Temporary Staffing Strategy are based on LCAA organizational structure as of October 2024. In the event this plan is implemented and assigned positions are vacant or no longer available, the Board Chair may select other senior staff to support each of the key Executive Director functions. It is the responsibility of the Executive Director to ensure that positions have appropriate cross-training to successfully implement the temporary staffing strategy.

3. Business as Usual

This succession plan and the staffing structure at LCAA are intended to minimize disruption in quality service and maintain business as usual to the extent possible. In the absence of the Executive Director, unless otherwise determined by the Board of Directors, business as usual includes maintenance of the following (See Attachment 2):

- A. Delivery of services
- B. Accounting, billing, payroll, purchasing and payables
- C. Fundraising
- D. Liaison with the Board of Directors
- E. Facilities and information technology oversight
- F. Supervision and oversight of management and staff

While this timeline may vary based on circumstances, the suggested steps for implementation are:

- Executive Management Team informs Board Chair immediately of unplanned absence.
- The Board Chair informs the Board of appointment of **Macy Self**, Associate Director to the post of Acting Executive Director.
- The Board Chair (and potentially other officers) consults with the Acting Executive Director on circumstances of the absence, organizational situation, and related factors.
- After the Board Chair and Acting Executive Director consult, stakeholders will be notified following the plan.

4. Succession Plan Implementation

The Board of Directors authorizes the Board Chair to implement the terms of this succession plan in the event of a planned or unplanned temporary, short-term absence of the Executive Director.

- It is the responsibility of the Executive Director to inform the Board of Directors of a planned temporary or short-term absence, and to plan accordingly.
- As soon as feasible, following notification of an unplanned temporary or short-term absence, the Board Chair may convene an Executive Committee meeting to affirm the procedures prescribed in this plan, or to modify them if needed.

5. Succession Plan in event of a temporary, unplanned absence (SHORT -TERM)

A. Definitions

1. A temporary absence is one in which it is expected that the Executive Director will return to his/her position once the events precipitating the absence are resolved.
2. An unplanned absence is one that arises unexpectedly, in contrast to a planned leave, such as a vacation or a sabbatical.
3. A short-term absence is three months or less.

B. Who may appoint the Acting Executive Director?

1. The Board of Directors authorizes the Board Chair to implement the terms of this succession plan in the event of the unplanned absence of the Executive Director.
2. In the event of an unplanned absence of the Executive Director, **Macy Self**, Associate Director, may immediately inform the Board Chair of the absence.
3. As soon as is feasible, the Board Chair may convene a meeting of the Executive Management Team to affirm the procedures prescribed in this plan or to make modifications the team deems appropriate.

C. First backup for the position of Acting Executive Director

The Board Chair may designate **Macy Self, Associate Director**, to the position of Acting Executive Director. His/her position description may specify that s/he may serve as the backup and Acting Executive Director in the absence of the Executive Director unless otherwise decided by the Board. S/he will have a Succession Plan with designated appointees if s/he becomes Acting Executive Director or if s/he is otherwise unable to serve his/her own functions as **Associate Director**.

D. Cross-training plan for appointees

The Executive Director may develop a plan for training the potential appointees in the priority functions of the Executive Director which are listed in section 2 above. The training plan will be attached to this document when the plan is completed. The Director of Operations may have the responsibility of handling the logistics of the plan's implementation.

E. Authority and restrictions of the appointee

The person appointed as Acting Executive Director may have the same authority for day-to-day decision making and independent action as the Executive Director. Decisions that may be made in consultation with the Board or other appropriate committee include senior management staff hiring and terminations, financial issues, taking on a new project, and taking public policy positions on behalf of the organization.

F. Compensation

The Board may consider a salary adjustment for the Acting Executive Director.

G. Board Chair responsibility for oversight and support to the Acting Executive Director

As with the Executive Director, the Board Chair and Board of Directors will have the responsibility for monitoring the work of the Acting Executive Director. The Acting Executive Director will provide regular updates and meet with the Board. The Board will also be alert to the special support needs of the Acting Executive Director serving in this temporary leadership role and act to address them.

H. Communications plan

Within eight (8) hours after an Acting Executive Director is appointed, the Board Chair and the Acting Executive Director may meet to implement an external communications plan to announce the organization's temporary leadership structure including the kind of information that will be shared and with whom (e.g. major donors, civic leaders, government officials). (See Attachment 2)

Within 24 hours to 48 hours after an Acting Executive Director is appointed, the Board Chair and Acting Executive Director may implement the communications plan to announce the organization's temporary leadership structure to the management team, the Board of Directors, and the Advisory Board.

Notifications will take place in sequence on the following timetable:

- Within 24 hours, the Acting Executive Director notifies the Management Team.
- Within 24 hours, the Acting Executive Director will notify the staff.
- Within 72 hours, the Acting Executive Director will notify the closest vendors, the banks, and the auditor.
- Within seven days, the Acting Executive Director will notify the local and state governmental funding agencies, officials, and foundations.

For a full overview of the communications plan, see Attachment 2: Succession Plan Detail: Executive Director

6. Succession Plan in event of a temporary, unplanned absence (LONG-TERM)

A. Definition

1. A temporary absence is one in which it is expected that the Executive Director will return to his/her position once the events precipitating the absence are resolved.
2. An unplanned absence is one that arises unexpectedly, in contrast to a planned leave, such as a vacation or a sabbatical.
3. A long-term absence is one that is expected to last more than 3 months.

B. Procedures

The procedures and conditions to be followed may be the same as for a short-term absence with one addition: The Board will give immediate consideration, in consultation with the executive management team, to temporarily backfilling the position left vacant by the Acting Executive Director. This is in recognition of the fact that, for a term of more than three months, it may not be reasonable to expect the Acting Executive Director to carry out the duties of both positions. The position description of a temporary director would focus on covering the priority areas in which the Acting Executive Director needs assistance.

7. Succession Plan in event of a PERMANENT unplanned absence

A. Definition

A permanent absence is one in which it is firmly determined that the Executive Director will not be returning to the position.

B. Procedures

The procedures and conditions may be the same as for a long-term temporary absence with one addition: The Board Chair may appoint a Transition and Search Committee of nine members in accordance with the terms of LCAA By-Laws and Succession Policy and follow the procedures set forth in LCAA By-Laws and Succession Policy.

8. Approvals and maintenance of records

A. Succession Plan approval

This succession plan will be approved by the full Board of Directors and reviewed biennial at a Board meeting to make any needed changes in the standing appointees. The Board may review and amend the plan at other times if a standing appointee is no longer available to serve in an Acting Executive Director capacity. The Board may reevaluate the plan when new designees are appointed.

B. Signatories

This plan may be signed by the Board Chair, the Executive Director, the Human Resource Director, and the standing appointees designated in this plan.

C. Maintenance of record

Copies of this plan may be maintained by the Board Secretary, Executive Director, Human Resource Director, and the standing appointees designated in this plan.

Plan has been reviewed and approved by LCAA Board of Directors on this **12** day of **November 2024**

David Hawkins, Board Chair

Rebecca Reynolds, Executive Director

Dawn McDaniel, Human Resource Director

Macy Self, Acting Executive Director

LIFT Community Action Agency, Inc.
Succession Plan Detail
November 12, 2024

Name: **Rebecca Porter, *Executive Director***

First Backup: **Macy Self, Associate Director**

First Backup Support: Provides support in collaboration with Macy Self, Associate Director

- Personnel Management: Dawn McDaniel, Human Resource Director
- Grants, Planning & Public Relations: Rhonda Teague, Director Planning/PR
- Financial: Sheree Ensley, Fiscal Officer and Sheree Ensley, Accounting Supervisor

Second Backup(s): **Dawn McDaniel, Human Resource Director**

Second Backup Support: Provides support in collaboration with First Backup Support

- Personnel Management: Dawn McDaniel, Human Resource Director
- Grants, Planning & Public Relations: Rhonda Teague, Director Planning/PR
- Financial: Sheree Ensley, Fiscal Officer and Sheree Ensley, Accounting Supervisor

Short-Term Staffing of Key Functions

Key Functions	Short Term Staffing Strategies <i>(Define Short-Term: (Up to 3 months))</i>
Provides direction, guidance, & assistance to initiate program activities including: – Grants & Operations Management – Public Policy & Public Information – State Plan Dev., Monitor Report – Planning & Project Development	Macy Self, Associate Director (in collaboration with) Sheree Ensley, Fiscal Officer Kathy James, SR Planner Rhonda Teague, Director Planning/PR
Directs and oversees fiscal affairs of LCAA	Sheree Ensley, Fiscal Officer
Manages and oversees personnel functions	Dawn McDaniel, Human Resource Director
Provides support to the Chair, Board, Committees and Board Members	Macy Self, Associate Director Dawn McDaniel, Human Resource Director
Ensures effective relationships with state agencies, disability community, Governor's office, state legislature and federal agency	Rhonda Teague, Director Planning/PR <u>and</u> consultation with Board Chair

Notifications:

Notify: Temporary Leadership Change	Accountability: Person to Send Notification	Timeline: Notification to be Made
Board Chair	Macy Self, Associate Director <u>or</u> Dawn McDaniel, Human Resource Director	ASAP
Executive/Personnel Committee	Macy Self, Associate Director <u>or</u> Dawn McDaniel, Human Resource Director	1 – 2 hours
Program Directors	Macy Self, Associate Director <u>or</u> Dawn McDaniel, Human Resource Director	1 – 2 hours
Accounting/Payroll, HR, Others as Appropriate	Macy Self, Associate Director, Sheree Ensley, Fiscal Officer <u>or</u> Board Chair	1 st 4 hours
Board Members	Macy Self, Associate Director <u>or</u> Board Chair	1 – 2 days
Staff	Macy Self, Associate Director <u>or</u> Dawn McDaniel, Human Resource Director	1 – 2 days
Governor's Office	Macy Self, Associate Director <u>or</u> Board Chair	1 – 2 days
Grantees as needed	Macy Self, Associate Director <u>or</u> Rhonda Teague, Director Planning/PR	1 st Week
State Agency Colleagues	Macy Self, Associate Director <u>or</u> Rhonda Teague, Director Planning/PR	1 st Week
Oklahoma Secretary of State	Kathy James, Senior Planner	1 st Week
Other Interested Parties	Dawn McDaniel, Human Resource Director <u>or</u> Rhonda Teague, Director Planning/PR	1 st Week

Contact information for the above contacts is located in the following:

- Contact Information
- Membership
- LIFT CAA Who to Call
- Grantee Database

Required Contact Information Lists for the Above Contacts to be Developed:

- *State Agency Colleagues*
- *Governor's Office*

Cross-Training Plan (on Executive Director Role)

Training Area	Staff to be Cross Trained		Timeline
	Trainee	Trainer	
Grants and Regulations Training: Self-Review	Macy Self	Rebecca Porter	Ongoing
Board Relations Activities and Coordination	Board Chair Macy Self	Rebecca Porter	Ongoing
Issues/Topics of Board, Board and Government Office	Board Chair Macy Self	Rebecca Porter	Ongoing
Understanding of How to Develop Agendas, etc.	Macy Self Dawn McDaniel	Kathy James	ASAP Develop Written Procedures

JOB DESCRIPTION
Executive Director

- | | |
|--|-------------------------------------|
| 1. LIFT Community Action Agency, Inc. | 2. Program: Administration |
| 3. Reports To: Board of Directors | 4. Title: Executive Director |
| 5. Grade: By Contract | 6. Date: October 2021 |
| 7. Approved By: Board Chair <i>WS</i> | 8. Status: Exempt |

JOB SUMMARY:

The Executive Director is responsible for the overall management of the Agency. This includes securing, allocating, managing, oversight, monitoring operations to meet the Agency's goals. The Executive Director further provides policy guidance, program planning, and business design to insure the accomplishment of the Agency's mission and objectives.

CLASSIFICATION:

This position is Exempt from the Fair Labor Act and its amendments.

DUTIES AND RESPONSIBILITIES:

1. Provides leadership in developing program, organizational and financial plans with the LIFT CAA Board of Directors and the Associate Directors.
2. Executes plans and policies established and authorized by the LIFT CAA Board of Directors. Keeps the LIFT CAA Board of Directors fully informed.
3. Serves as spokesperson for the Agency and in so doing, establishes and maintains sound working relationships with all elements of the community to further their understand of the Agency's activities and objectives. Ensures that activities of the Agency programs and goals are publicized and ensures that cooperative arrangements are made with community groups and organizations.
4. Reviews and makes a final written determination of hiring and termination of personnel.
5. Responsible for the administration of all contracts and grants awarded to the Agency.
6. Works with the Board of Directors in identifying policy and planning issues.
7. Delegates assignments to the Associate Directors to carry out objectives of the various programs.
8. Provides policy and procedure guidance under which the Agency and employees operate.
9. Promotes active and broad participation by staff in all areas of the Agency's involvement.
10. Ensures compliance with Federal, State and local regulations.
11. Ensures that confidentiality is maintained regarding all matters internal to the Agency's operations, employees and clients.
12. Assures long range strategy is in place to achieve the Agency's mission and that progress is attained on all elements of the mission.
13. Provides planning and program design which involves development and articulation in grant and contract applications of program goals, objectives, procedures, processes, and budget priorities.

14. Maintains a knowledge of significant developments and trends affecting funding supporting current and future Agency programs.
15. Represents all programs and the Agency's position to other service organizations and to the general public.
16. Provides oversight and monitoring which involves measures to verify program accomplishments of the Agency's goals and objectives.
17. Ensures that sound financial practices are developed and maintained.
18. Jointly with the Chairman and Secretary of the LIFT CAA Board, conducts official correspondence and executes legal documents.
19. Ensures adequate security, upkeep and maintenance of all property and equipment owned, rented or leased by the Agency.
20. Ensures that job descriptions are developed, that regular performance evaluations are held and that sound human resources practices are in place.
21. Maintains an up-to-date organizational chart.
22. Ensures that an effective management team is in place with appropriate succession plan.
23. Maintains a climate that attracts, keeps and motivates a diverse staff of top quality employees.
24. Directly supervises and performs periodic performance evaluations of Associate Directors and administrative staff who report to the Executive Director; and
25. Performs other related duties as assigned by the Board of Directors.
26. Must comply with all Federal Grant Regulations including, but not limited to, no indictment for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offences listed in 180.800(a).

SUPERVISORY RELATIONSHIP:

The Executive Director is directly responsible for the LIFT CAA Board supervises Associate Directors and all administrative staff who report to the Executive Director.

EDUCATIONAL QUALIFICATIONS:

Degree in public or business administration or a combination of education.

1. Five (5) or more years of experience at mid-and upper-level administrative positions.
2. Bachelor's degree in public or business administration from an accredited college or university is desired. With extensive administrative and supervisory experience with government programs and equivalent combination of relative education and experience.
3. Experience in and knowledge of the principles of planning, budgeting, accounting and fiscal management.
4. Must have considerable knowledge of program administration techniques and procedures as well as proven ability to effectively supervise professional staff.
5. Knowledge of the structure and functions of governmental agencies.
6. Public relations experience is a plus.

MENTAL AND PHYSICAL DEMANDS/ENVIRONMENTAL FACTORS:

1. Constantly must be able to sit/stand in a stationary position 50% of the time.
2. Frequently must be able to move about inside the office to access file cabinets, office machinery, etc.

3. Frequently must operate a computer and other office productive machinery, such as a calculator, copy machine, and computer printer.
4. Frequently must communicate with staff and others who have inquiries about the program. Must be able to exchange accurate information in these situations.
5. Able to see and read PC screens; detect color coding, read fine print, and/or normal type size print.
6. Ability to understand, remember, and apply oral and/or written instructions and other information.
7. Make appropriate job decisions following standard office policies and past precedents.
8. Think through the consequences of a decision prior to making it.
9. Ability to make decisions which have moderate impact on the immediate work unit and monitor impact outside the immediate work unit.
10. Ability to complete routine forms, use existing form letters and/or conduct routine oral communication.
11. Ability to add, subtract, multiply, divide and to record, balance, and test results for accuracy.
12. Occasionally must move/carry items weighing up to 30 pounds or more.

I have read and understand the job description listed above. My questions have been answered. I am fully qualified for this position and can perform the duties as described. I understand that this is not an exhaustive list of all my duties and responsibilities. I understand that Management (and no other) reserves the right to revise this job description as deemed necessary.

LIFT Community Action Agency, Inc. is an Equal Opportunity provider and employer. The functions, qualifications, requirements, and physical demands listed in this job description represent the essential functions of the job, which the employee must be able to perform either with or without reasonable accommodation. As an equal opportunity provider and employer, LCAA will make reasonable accommodations to enable individuals with disabilities to perform their job duties/functions. The listed job functions, duties and responsibilities do not necessarily include all activities that the employee may perform. Nothing herein restricts management's right to assign or reassign duties and responsibilities to this job at any time. This position is Exempt from the provisions of the Fair Labor Standards Act and its amendments.

I certify that I understand and accept the responsibilities and duties of this position.

Employee Signature

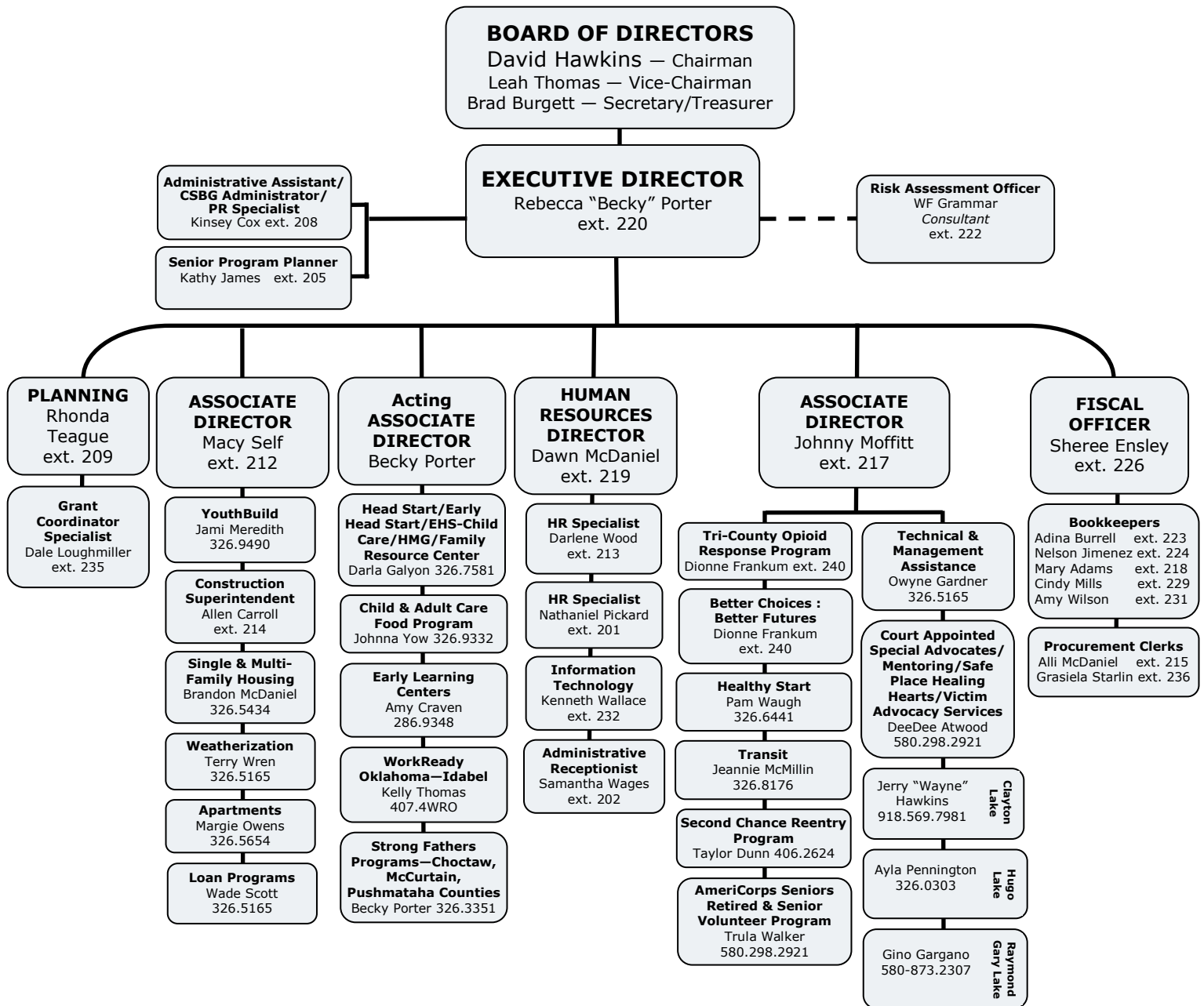
Date

Employee Name (Printed)

LIFT Community Action Agency, Inc.

2024 ORGANIZATIONAL CHART

Administrative Office: 580.326.3351 Fax: 580.326.2305 (2nd floor)



**CONTRACT FOR CHILD ABUSE MULTIDISCIPLINARY TEAM ACCOUNT FUNDING
CALENDAR FISCAL YEAR 2025
CHOCTAW COUNTY**

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

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

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

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

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

Contract Funding: In accordance with Title 10 O.S. §1-9-102, **OCCY** may disburse the contracted amount at the beginning of the calendar year to the **Contractor** on behalf of the FSMDT upon the FSMDT satisfactorily being recognized by **OCCY** as a functioning FSMDT (see OAC 135:10-25-1 through 10-25-8). The maximum total of this contract is **\$ \$34,267.90** for the period of January 1, 2024, through December 31, 2024. This contract shall not take effect and no funds may be disbursed until **OCCY** has in its possession the contract containing original signatures of both parties and a purchase order has been issued by OMES or another approved State agency.

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

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

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

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

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

Duties of **OCCY**: The **OCCY** shall

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

GENERAL TERMS AND CONDITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Non-Collusion Certification: The **Contractor** will complete and return the non-collusion certification, OMES-FORM-CP-004.

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

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

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

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

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

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

APPROVED:

Representing the OCCY as legal signatory

APPROVED:

Representing Contractor as legal signatory

Brittany Gassner
Program Manager, FSMDT Department

Date

Printed Name:
Title:

Date

**CONTRACT FOR CHILD ABUSE MULTIDISCIPLINARY TEAM ACCOUNT FUNDING
CALENDAR FISCAL YEAR 2025
PUSHMATAHA COUNTY**

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

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

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

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

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

Contract Funding: In accordance with Title 10 O.S. §1-9-102, **OCCY** may disburse the contracted amount at the beginning of the calendar year to the **Contractor** on behalf of the FSMDT upon the FSMDT satisfactorily being recognized by **OCCY** as a functioning FSMDT (see OAC 135:10-25-1 through 10-25-8). The maximum total of this contract is **\$ \$34,267.90** for the period of January 1, 2024, through December 31, 2024. This contract shall not take effect and no funds may be disbursed until **OCCY** has in its possession the contract containing original signatures of both parties and a purchase order has been issued by OMES or another approved State agency.

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

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

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

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

the **Contractor**, especially as the fiduciary agency, and, if applicable, in which the FSMDT agrees to pay the **Contractor** for their services.

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

Duties of **OCCY**: The **OCCY** shall

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

GENERAL TERMS AND CONDITIONS

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

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

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

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

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

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

take all reasonable steps to minimize termination costs. The **Contractor** agrees to submit to **OCCY** any outstanding expenditure reports and supporting documentation within 30 days of cancellation so that a final remaining balance can be confirmed by **OCCY**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

APPROVED:

Representing the OCCY as legal signatory

APPROVED:

Representing Contractor as legal signatory

Brittany Gassner
Program Manager, FSMDT Department

Date

Printed Name:
Title:

Date

Civil Rights

Pre-Bid Training for Grantees

Civil Rights Laws

- **1. Title VI of the Civil Rights Act:**
Prohibits discrimination in programs or activities on the basis of race, color and national origin.
- **2. Program Statutes (Safe Streets Act, Victims of Crime Act, JJDPA):**
Prohibits discrimination in employment practices or in programs and activities on the basis of race, color, religion, national origin and sex.
- **3. Section 504 of the Rehabilitation act of 1973:**
Prohibits discrimination in employment practices or in programs and activities on the basis of disability.
- **4. Title II of the Americans with Disabilities Act of 1990:**
Prohibits discrimination in services, programs, and activities on the basis of disability.
- **5. Age Discrimination Act of 1975:**
Prohibits discriminations in programs and activities on the basis of age.
- **6. Title IX of the Education Amendments of 1972:** Prohibits discrimination in educational programs or activities on the basis of sex.

Civil Rights Application

- **Some of the Civil Rights Statutes are Cross Cutting Statutes which means they apply to all Federal Funding regardless of the Federal Funding Agency**
- **Cross Cutting Statutes are: Title VI of the Civil Rights Act; Section 504 of the Rehabilitation Act; Title II of the ADA; Age Discrimination Act; and Title IX of the Education Amendment**
- **When a statute uses the language “program or activity” this means the statute applied to all of the operations of the organization and not just the service or activity funded**

Protected Classes

- Race
- Color
- National Origin
- Sex
- Religion
- Disability
- Age

Protected Classes are Important to Understand

A person cannot bring a federal suit against an agency based upon how the individual was treated. The suit is brought against an agency because they have a history of discrimination against people in one or more protected class.

- **Color- not the same as race**
- **Sex - includes pregnancy and sexual harassment, is moving towards sexual orientation and gender identity**
- **Religion - not just limited to membership of a particular group. Definition applies to any sincerely held moral or ethical belief. Example: If a funded agency refuses to provide services to someone who doesn't share the agencies belief on the death penalty, that person could have a discrimination claim. Federally funded programs have an obligation to accommodate a persons religious practices or beliefs as long as the accommodation does not pose an undue burden on the program.**
- **Disability- persons with a disability have the right to require federally funded programs to modify programs to make then accessible, unless the modification would impose and undue burden or hardship, or alter the nature of the program. Example: An after school program may have to provide interpretation services to a person who is hearing impaired.**

NO Retaliation

- **If a person files an employment or service discrimination complaint, regardless of its merits, an employer or service provider cannot retaliate against the person who signed the complaint.**
- **Retaliation claims are easier to prove than the underlying discrimination complaint.**
- **Retaliation claims stand on their own without regard to the outcome of the discrimination claim.**

Title VI of the Civil Rights Act of 1964

- **Provides the basis for civil rights protection in Federally assisted program.**
- **Applies to the whole organization receiving Federal funds, not just specific to the grant funded program.**
- **Prohibits the following on the basis of race, color or national origin:**
 - **Treating individuals differently when determining eligibility for services.**
 - **Denying the opportunity to participate as a member of a planning or advisory board.**
 - **Selecting a programs location with the purpose or effect of excluding individuals.**

Disability Discrimination

A person with a disability is defined as a person who has a physical or mental impairment which substantially limits one or more life activity, or a person who has a record of such impairment, or is regarded as having such an impairment whether or not they are disabled.

- Section 504 of the Rehabilitation act of 1973**
- Title II of the Americans with Disabilities Act of 1990 (ADA)**
- Applies to the recipients of Federal funding and prohibits discrimination against qualified individuals on the basis of disability.**
- Applies to public entities, whether or not they receive federal funding and prohibits discrimination against individuals on the basis of disability.**

DOJ Program Statutes

These acts apply to both employment in connection with the agency and services offered by the agency. They apply only to DOJ funding.

Omnibus Crime Control and Safe Streets Act of 1968 (Safe Streets Act)	Victims of Crime Act (VOCA)	Juvenile Justice and Delinquency Prevention Act (JJDP)
The Safe Streets Act prohibits discrimination against any person on the grounds of race, color, religion, national origin, or sex.	VOCA prohibits the exclusion of benefits, services or employment to individuals on the grounds of race, color, religion, national origin, handicap, or sex.	JJDP prohibits discrimination on the basis of race, color, religion, national origin, sex, or handicap.

Ways to Prove Discrimination

Disparate Treatment

- Intentionally treating individuals of a protective class differently.
- To prove discrimination based on disparate treatment a person has to show they are a member of a protected class, their application for services or employment was rejected based upon a protected class status, and they have to show others from their protected class were also denied.

Disparate Impact

- Neutral policy or procedure has the effect of discriminating against individuals of a protected class.
- Example of disparate impact; An employer may have a test that has the effect of disproportionately eliminated females. In order to prove their intent was not to eliminate females, the employer would have to show the test was valid, it measures the ability of the person to perform the job, it's related to a business necessity and the screening device was a least restrictive means available.

National Origin Discrimination

Includes Discrimination on the basis of LEP

A Limited English Proficient person has a first language other than English and has a limited ability to read, speak, write, or understand English.

Avoid Discrimination Against LEP Persons

- Take reasonable steps to ensure meaningful access to the programs, services and information free of charge.
- Establish and implement policies and procedures for language assistance services that provide LEP persons with meaningful access.

Provide Language Services

- Oral (Interpretation) Services – Ensure interpreter is competent. (In most cases family members are not appropriate)
- Written (Translation) Services – Provide translation of written materials., especially vital documents.

Develop a Language Access Plan (Go to www.LEP.gov for Information)

- Ensures consistent application of all policies and practices.
- Provides the basics for staff on how best to serve LEP persons.
- Informs LEP persons about available language access services.

LEP: What are Reasonable Steps?

- **Examine the number or proportion of LEP persons served or encountered in the eligible service population. The greater the number or proportion of LEP persons served the greater the need for LEP services.**
- **Determine the frequency with which LEP persons come in contact with the program. The greater the frequency the greater the need for language services.**
- **Determine the importance of the program/information/service or the consequence if the service is not provided. The greater the consequence the greater the need.**
- **Assess the resources available in the costs of the language services. This may have an impact on the steps that need to be taken to provide language services.**
- **Written (Translation) Services- When determining which documents to translate, take into account the consequences to the LEP person if the information is not provided.**

Equal Employment Opportunity Plan (EEOP)

- **An EEOP is a comprehensive document which analyzes:**
 - **an agency's workforce in comparison to the relevant labor market data**
 - **employment practices to determine their impact on the basis of race, national origin, and sex.**
- **The EEOP is a tool to identify possible discriminatory practices. For more information go to:**

www.ojp.usdoj.gov/about/offices/ocr.htm

Faith Based Organization (FBO) Guidance

- **FBO Practices**

FBOs may not use federal funding to advance inherently religious activities.

FBOs may not discriminate against beneficiaries based on religion or religious belief.

FBO Regulations do not alter existing non-discrimination provisions against employment discrimination.

- **FBO Treatment**

Obstacles to inclusion of FBOs in funding programs must be eliminated.

FBOs must be given equal treatment as other organizations.

2024 BOARD TRAINING PLAN

Community Action

Agency: **LIFT Community Action Agency, Inc.**

Plan developed by: **Rebecca (Reynolds) Porter, Executive Director**

Recommended Training Categories & Topics			Planned Date for Training
<i>Select the topics you plan to include in your agency's annual Board Training Plan.</i>			
ROMA	☒	Results Oriented Management and Accountability (ROMA Video or other ODOC required training material)	6/11/2024
	☒	ROMA Application: Performance based management concepts embodied in ROMA as the framework for all aspects of agency operations including program planning, resource allocation, service provision, program evaluation and theory of change	2/13/2024 (Annual Report to ODOC)
	☒	Community Needs Assessment: * assessing, and respond to the causes and conditions of poverty in the community * board's specific role in prioritizing the results and deciding which needs the agency should address (in alignment with mission)	2/13/2024 C.N.A. Summary (Current C.N.A. Updates/Training) 4/9/2024 (New C.N.A. Survey Collection) 11/12/2024 Board Prioritization of Needs
	☒	Planning: Developing the Community Action Plan (annual plan) and Strategic Plan (long-range plan). Evaluate last year's performance to determine what needs to be done differently this year	2/13/2024 and 11/12/2024
	☒	Program Implementation – oversight of agency programs and activities throughout the year, receive and analyze periodic reports from agency staff with focus on progress toward achieving milestones	All Board Meetings (held 2nd Tuesday of each month)
	☒	Analyzing Data & Assessing Results among programs, clients and communities being served	2/13/2024 (Annual Report to ODOC)
	☒	Agency Program evaluation: How to determine the relative "success" of the agency by comparing outcomes with performance expectations which were developed during the agency's planning cycle. How to use the agency's Community Needs Assessment, Community Action Plan and Strategic Plan throughout the ROMA cycle for continuous program evaluation and improvement.	2/13/2024 (Initial submission of Docs with CSBG application) 11/12/2024 (Review of Projected to Actual Outcomes)
Financial Oversight	☒	Agency-wide Budget	11/12/2024
	☒	CSBG Organizational Standards Fiscal Management	9/10/2024
	☐	Financial Oversight: overall agency fiscal status, procedures, practices, and transactions	9/10/2024
	☒	How to interpret an audit report	9/10/2024 (Auditor)
	☒	How to interpret financial statements	9/10/2024
	☒	Board of Directors' Roles and Responsibilities	1/9/2024

Recommended Training Categories & Topics <i>Select the topics you plan to include in your agency's annual Board Training Plan.</i>			Planned Date for Training
General	☒	Board recruitment and retention	3/12/2024
	☒	Low income participation in board activities and members (Org, Standard 1.1)	3/12/2024
	☒	Evaluation of the Executive Director	10/8/2024
	☒	The Role of Board Minutes	8/13/2024
	☒	How boards can evaluate their own board's performance	1/9/2024 (Board Self-Assessment)
Requirements	☒	History and future of Community Action and anti-poverty work	5/14/2024
	☒	Statutory and regulatory requirements (CSBG Act, other Federal, State or local statutes)	5/14/2024
	☒	CSBG IM82 Tripartite Boards	1/9/2024
	☒	CSBG Organizational Standards	7/9/2024
	☒	Board Roles & Responsibilities	1/9/2024
	☒	ODOC's CAA Implementation Manual, Requirement 113	5/14/2024 (includes training over revisions)
	☒	Open Meeting Act training	8/13/2024
Other	☒	<i>LIFT CAA History, Mission, Vision and Values Statement</i>	5/14/2024
	☒	<i>Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA) Policies and Procedures (Head Start/Early Head Start/EHS-Child Care)</i>	1/9/2024, 6/11/2024 and 12/10/2024
	☒	<i>Affirmative Action Plan</i>	2/13/2024
	☒	<i>Victims Services Programs</i>	12/10/2024
	☐		

Attach additional pages if needed

Resources:

ODOC's CAA Implementation Manual

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

Office of Community Services' IM 82

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

Community Action Agency Board Members TOOLKIT:

<http://www.cencomfut.com/toolkit.htm>

CAPLAW Bylaws Toolkit, *Updated 2009*

<http://caplaw.myshopify.com/products/caplaw-bylaws-toolkit-electronic-copy>

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

http://bit.ly/OSCOEresources_GovernanceGuide

CSBG Organizational Standards Category 5 Board Governance Technical Assistance Guide:

http://cap.iescentral.com/filelibrary/category5_governance_final.pdf

2024 ROMA Plan

LIFT Community Action Agency, Inc.

Date:

1/15/2024

ROMA Cycle	ROMA Action Item	Participant Manual Module	2024 Target Completion Date	Person(s) Responsible
Assessment	Review/revise current MISSION statement	2, Part 1	14-May-24	Board, ED, AD's; Prog Dir; Staff; ROMA Coord
	Review last community NEEDS assessment to determine priority needs. Ensure that needs identified are properly labeled as family, agency, and community levels	2, Part 2	3/12/2024	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
	Evaluate the available resources in your community to address any service gaps or find collaborators	2, Part 2	01/01/2024 and ongoing	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
	Evaluate current program services and determine effectiveness to meet needs (based on recent program performance).	2, Part 2	03/12/2024 and ongoing	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
Planning	For the top 3-5 needs identified in your most recent CNA, develop a logic model. Fill in as you complete the ROMA action items. Once your planning logic models are completed, submit with your Community Action Plan.	7	February 28, 2024	Planning Director; ROMA Coordinator
	Based on needs and program evaluation, identified during the assessment process, plan your measurable OUTCOMES to be achieved to meet the needs that are linked to the 6 NPI's.	3, Part 1	03/12/2024 Planning Logic Models/CAP Plan; 11/12/2024 Report on PMO to Board	Planning Director; ROMA Coordinator
	Identify SERVICES and strategies to achieve outcome(s).	3, Part 2	01/01/2024 and ongoing	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
	Determine OUTCOME INDICATORS	4	01/04/2024-02/28/2024 Logic Models created which identify outcomes	Leadership; Program Staff; Planning Dept.
	Determine your projected success rates for each outcome indicator.	5	01/04/2024-02/28/2024: Set Targets/Projections	Program Directors; Leadership; Staff
	Develop a system to track services and outcomes. Determine what documentation will be collected to measure each outcome, staff responsible and how often data will be collected. (MEASUREMENT, DATA, and FREQUENCY)	5	01/01/2024-12/31/2024; Data/reports shared monthly or as available with Program Directors	ROMA Coordinator
	Update Community Action Plan to include outcomes, strategies and specific data collection information.	3, Part 1	01/04/2024-02/28/2024	Planning Director; ROMA Coordinator
Implementation	Implement revised Community Action Plan	4	01/01/2024-12/31/2024	Leadership; Staff; Board; Partners
	Determine frequency to monitor implementation of plan.	4	Quarterly; 03/2024; 06/2024; 09/2024 and 12/2024;	Program Directors; Leadership; Staff; Planning Dept;
	Determine the frequency for evaluating progress and report results to board.	4	Quarterly; 03/2024; 06/2024; 09/2024 and 12/2024;	Program Directors; Leadership; Staff; Planning Dept;
Achievement of Results	Measure your actual RESULTS for each outcome	5	Oct-24	Program Directors; Leadership; Staff; Planning Dept;
	Update your planning logic models with the actual results, then resubmit to ODOC.	7	11/12/2024 and with new 2025 CSBG application	Planning Director; ROMA Coordinator
	Analyze data; compare with performance targets/projected success rates determined during the planning phase.	5	11/01/2024-11/30/2024 Review Module 4 Targets against Actual	Planning Director; ROMA Coordinator
Evaluation	Adjust performance goals as needed as evidenced by actual performance. Continue strategies that achieve desired performance goals. Revise or discontinue strategies that do not achieve desired performance.	5	07/01/2024 (Midyear review of Projected to Actual (PMO, Logic Models, Module 4 Targets)	Program Staff; ROMA Coordinator with input from leadership
	Update Community Action Plan.	4	01/04/2024-02/28/2024	Planning Director; Leadership; Staff; PD's Board
	Submit CSBG IS report.		Feb-24	CSBG Administrator/ROMA Coordinator
	Reevaluate the community needs assessment process make changes (if needed) to ensure that later assessments follow the ROMA framework and guidelines	2, Part 2	06/01/2024-10/31/2024; Conduct Needs Assessment; Collect Surveys; Hold Community Meetings	Planning Dept; Leadership; Board; Community Members; Staff; Partners
	Review the demographics of the population served. Identify if they have received single services, multiple services, or bundled services. Consider the connections among people, services, and outcomes.		01/01/2024-12/31/2024 Completed monthly by data entry staff and reviewed semi-annually by P.D./ROMA Coord	CSBG/Admin; CAPTAIN Data Entry Staff; Program Staff

FY 2024 Community Needs Assessment Summary
LIFT (Lifting Individuals For Tomorrow) Community Action Agency, Inc.

1. What date was the assessment conducted? The Community Needs Assessment began in May 2021. The community “piece” of the assessment (data collection, meetings, etc.) was completed in December 2021; Data collection from Census and other sources was completed in January 2022. The report was approved at the January 11, 2022 Board of Directors meeting.

2. How were surveys conducted (phone, mail, personal contact, etc.)? Surveys were conducted using paper printouts from the survey in CapSystems. These surveys were distributed several ways. They were emailed to all staff and Board of Directors. Paper copies of the surveys were sent home with all Head Start, Early Head Start, and Early Head Start-CC students as well as participants of Healthy Start.

Board members, front-line staff, leadership, program directors and supervisors received an additional survey during the month of November 2021. This survey required respondents to rank the top three needs from a list of the top 10 needs pulled from the results of the Community Needs Assessment survey results. All respondents were also asked to provide rationale or qualitative data for each of their selections.

3. Were low-income individuals surveyed? (Organizational Standard 1.2) Specifically, low-income individuals with children enrolled in the agency’s Head Start and Early Head Start programs were surveyed. This survey was advertised and available to all residents living within Choctaw, McCurtain, and Pushmataha Counties, each of which has significant percentages of low-income residents as evident by the high poverty rates. All community sectors, as required by the CSBG guidelines, were surveyed. A total of 506 completed surveys were input into the CapSystems online survey tool. One survey question (Question 14 from the Oklahoma Needs Assessment Standardized survey) asked respondents to select from ten possible choices the sector which best represented them. From the 506 responses, 237 or 47% selected low-income. As another choice was “Client of Agency”, it is safe to assume that the actual number of respondents with low-income was much higher.

4. Were all five key sectors (community-based organizations, faith-based organizations, private sector, public sector and educational institutions) surveyed? If no, explain (Organizational Standard 2.2). **Yes.** The survey representation by each key sector was as follows: Community Based-4.35%; Faith-based-1.38%; Private sector-.99%; Public Sector-.99% and Educational institutions-2.17%.

5. Were others surveyed? Yes; All residents were encouraged to complete the survey and attend the Public Meetings. Those addressed in previous paragraphs represent the population surveyed which is representative of the service area and resident demographics. In addition to the five key sectors, other sectors included: Client of Agency-46.84%; Agency Board Member-

4.94%; Agency Volunteer-1.38%; and General Public (having not received services from the agency)36.76%. A total of 506 surveys were completed and entered into an online database.

6. Was information from the census included? Explain. (Organizational Standard 3.2) Yes. Population demographics, unemployment/income, and poverty data broken down by age, gender, race/ethnicity was included in the Community Needs Assessment. In addition, other data over housing, substance abuse, and community and economic development from reliable sources was included which supported the prioritized needs.

7. Did low-income individuals participate in the establishment of priorities after completion of the assessment? Explain. (Organizational Standard 1.1) Yes. Focus groups which included Board members, front-line staff, leadership, program directors and supervisors completed the questionnaires for prioritizing needs. Some participants that made up the focus groups represent individuals/families with low income.

8. What were the results of the assessment? List the needs in priority order. For each need indicate the level of need (family, agency or community) and whether those needs will be met by the agency and/or through partners and what the outcomes will be. ¹

Prioritized Need 1 – Housing: Decent, safe and affordable housing units is a family level need. The agency is currently addressing this need through the provision of weatherization, packaging of 504 loans/grants and supportive services. The agency also operates the LIFT Self-Help housing program (single family new construction) and provides numerous other housing and housing supportive services for residents. The outcome will be that families are able to secure safe and more affordable housing.

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

FY24 Objective: By 12/31/24, increase numbers of families of low-income receiving housing preservation through weatherization activities.

FY24 Strategies: Weatherize 70 homes in LIFT CAA's 12-county area for this activity.

Prioritized Need 2 – Substance Abuse Services: Our community has a need for additional substance use/abuse resources and supportive services. Substance abuse services is a community level need. The agency is currently addressing this need through the Tri-County Opioid Response Implementation Project which specifically aims to address the systemic needs of the opioid epidemic. Additionally, the Choctaw County Drug Free Communities Support Program addresses tobacco/marijuana use among our youth grades 6th-12th. Through these programs, LCAA is working with community members and organizations to start informative dialogue,

¹ The Prioritized Needs within the C.N.A. Summary remain the same and will continue to be addressed by the agency. However, the strategies to address those needs will always be changing. The FY24 Strategies are identified in the CAP and the Logic Models and are provided. Strategies to address Agency needs are also included.

build partnerships and plan systemic changes to prevention, treatment, and recovery of individuals affected. The outcomes will be improved community health and reduced morbidity and mortality associated with opioid overdose and poor health outcomes from tobacco and marijuana use.

Goal: Reduce Substance Use and Abuse and improve access to resources

FY24 Objective: By 08/31/2024, LIFT CAA will become certified as a Comprehensive Community Addiction Recovery Center

FY24 Strategies: The RCORPs Program Director will complete all phases required by Oklahoma Department of Mental Health and Substance Abuse Services to achieve certification. This will include development of policies and procedures; setting up referral services; and building infrastructure necessary to operate as a CCARC.

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

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

FY24 Objective: By 12/31/2024, make improvements to two cabins and the hospitality house located at Hugo Lake Park to boost tourism and the local economy.

FY24 Strategies: Secure funding for improvements at Hugo Lake Park/Marina and Hospitality House. Replace furnishings; paint; stain; make repairs; replace linens, etc. within two hospitality cabins. Make interior upgrades to the Hospitality House at HLP.

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

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

FY24 Objective: By 12/31/2024, 10 staff will attend and/or participate in trainings, webinars and conferences at 4 events (OKACAA, Region VI, NCAP, CAPLAW, NeighborWorks America, etc.) and 15 Program Directors will attend 4 Directors Meetings/Trainings to increase leadership capacity.

FY24 Strategies: LIFT CAA will host Program Director trainings quarterly and will inform/encourage/support offsite trainings provided by partners, funders, and professional trainers.

The top three needs prioritized from the community needs assessment conducted late in 2021 and subsequently approved by the Board at the January 11th, 2022 board meeting were Housing, Substance Abuse Services and Economic & Community Development. The new needs assessment reflected no change from the prior C.N.A. This is attributed in large part to COVID and the fact that two of the three years, the agency was limited due to social distancing, etc. in trying to implement the strategies identified to address the need. The other obvious fact was that when COVID hit our communities, as with the rest of the world, needs changed across all levels to include individual, family, community and agency.

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

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

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

As noted in the logic models for 2024, the prioritized needs which will be the focus for identifying and implementing strategies are: Housing, Substance Abuse Services, Economic/Community Development; and Agency Capacity Building.

UPDATES: The Community Needs Assessment was reviewed as part of the Strategic Planning process which occurred from August through December in FY2023. The top three needs as identified in the FY2022 C.N.A. remained the same. Some strategies for addressing those needs have been updated. These updates/revisions are reflected in the FY2024 logic models as submitted with the FY2024 CSBG application within the pre-award risk assessment.

This C.N.A. summary also reflects strategies for the agency level need to increase organizational capacity. Lastly, the COVID-19 related need identified in the most recent C.N.A. has been removed from the FY2024 C.N.A. summary. The original C.N.A. as written has not been changed. That document reflects the needs as seen by the communities at the time it was developed. Therefore, only this document and logic models reflect changes as necessary as the C.N.A. is a living document and environmental scans conducted annually can result in the need to make revisions.

2024 Community Action Plan (January thru December 2024)

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

Purpose:

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

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

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

The goal will be to focus resources towards achievement of outcomes identified in the C.N.A. report, Strategic Plan, Performance Management Outcomes excel workbooks and the FY24 logic models (all included as uploads). The logic models are representative of the communities’ top three prioritized needs-Housing, Substance Abuse Services and Community and Economic Development. Additionally, the CAP and Logic Models address the Agency need to increase organizational capacity.

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

LIFT (Lifting Individuals for Tomorrow) Community Action Agency, Inc. was founded in 1968 when three local Community Action Agencies merged in order to better meet the needs of families with low incomes who resided in any one of the three very rural and poverty-stricken Southeast Oklahoma Counties. LCAA's primary service area includes Choctaw, McCurtain and Pushmataha Counties, a land area of over 4000 square miles with a population of 56,058 which represents an increase of 228 individuals since the 2010 Census (U.S. Census Bureau American Community Survey QuickFacts Population estimates July 1, 2022). Nearly one in four individuals in the service area are living below the Federal Poverty Limits. This same source (U.S. Census July 1, 2022 Quickfacts) reflects that 12,596 individuals or 22.47% of the population lives below federal poverty income guidelines. This represents an increase from 2021 estimates which reflected 19.43% living below poverty. This shows that the increase in population is also representative of increased poverty. The agency, headquartered in Hugo, Oklahoma (Choctaw County) provides a wide array of services ranging from education, housing, social services, and emergency services to transportation and more all aimed at alleviating the conditions of poverty. LCAA is one of the top ten employers in the tri-county area with 243 full time staff and 27 part time staff as of December 31, 2023. The agency's annual budget is approximately \$27 million (FY24 Board approved agency budget) and supports about 20 separate programs. In August of 2021, the Board formally approved the long-awaited name change from Little Dixie CAA to LIFT Community Action Agency, Inc. The new name better reflects the growth and direction of the agency.

The CAP represents, in large part, an extrapolation of data from recent and relevant agency and community-developed documents which includes the 2023-2025 Strategic Plan; 2022-2024 Community Needs Assessment Report; 2023 Customer Satisfaction Data; and analyzed data from CAPTAIN and other program-tracking databases. The data contained within these documents represent actual client counts and demographics, survey responses, and summaries from community and focus group discussions, etc. Therefore, the CAP includes both quantitative and qualitative data. Some sections of the Community Needs Assessment report (approved by the Board of Directors on January 11, 2022) include qualitative data derived from interviews with Board members, service providers, residents, and staff. As part of the Strategic Planning process, the Community Needs Assessment Report was a resource that was used at length. The FY2023-2025 Strategic Plan and FY24 CAP for will not have a focus on the COVID-19 "need" from the C.N.A. as the need was no longer prioritized and the resources to address this former need have (CARES funding) been exhausted.

Stakeholders involved in the process of developing these documents included residents, staff, Board, other service providers, partners, and funders. The “key findings” that came out of these activities can be found throughout this 2024 Community Action Plan. LCAA’s 2024 CAP will be presented to the Board as a training and will be open for discussion during the regularly scheduled board meeting to be held March 12, 2024.

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

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

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

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

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

Assessment (demographic updates through December 2023 are inserted)

The community assessed represents LCAA's service area which includes Choctaw, McCurtain and Pushmataha counties. Collectively, these three rural Southeast Oklahoma counties have an average poverty rate of 22.47 percent (U.S. Census Bureau; July 2022 Poverty estimates). The population density is about 14.23 persons per square mile compared to the State's density of 57.7 persons per square mile. At the time of the assessment, about 65 percent of the population was white (**65.67 as of December 31, 2023**); 7.31 percent black (**6.43% 12/31/2023**); 10.6 percent multiple races (7.8% 12/231/2023); 13.9% Native American (**18.80% 12/31/2024**) with the remaining representing other races. Gender makeup is 51.64% female (**51.87 12/31/2023**) and 48.36% male (**48.13% 12/31/2023**). According to the U.S. Census ACS 2019 estimates, the combined population was 58,951. The population remained steady over the past three years since the last community needs assessment conducted in late 2019 early 2021. However, over the past decade (since the 2010 Census) the population has decreased across each county. This area as described represents LCAA's service area which represents the community assessed for the most current Community Needs Assessment for January 1, 2022 through December 31, 2024.

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

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

respondents completed surveys and the need referenced most was identified as the number one prioritized need and this process was used to identify the top three.

Once needs had been prioritized, LIFT Community Action Agency conducted six community meetings (two per county in each county within the service area) in order to gain additional input from residents, local services providers, staff, board, and other stakeholders on the prioritized needs and resources within the service area. These meetings were also advertised via email, newspaper advertisements, posters, and through social media outlets. Meeting participants engaged in activities of identifying causes/conditions of poverty, existing resources, gaps in resources, and potential strategies for addressing each of the three needs. All of this data was collected and utilized to develop the 2022-2024 (January 1, 2022 through December 31, 2024) Community Needs Assessment Report, which represents one of the documents used to develop this FY24 Community Action Plan. It should be noted that an environmental scan was completed during the last quarter of 2022 for help with developing the new three year strategic plan. As a result of that scan, the COVID-19 related need is not a focus of FY24. It was not removed as a need from the C.N.A. and is still within the emergency needs section (Prioritized Need 4). The FY24 CAP and Planning Logic Models also reflect minor variances relevant to the strategies to address needs.

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

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

A feature within the CAPTAIN software, the Service Integration Matrix (SIM) will assess if the client is eligible for other services than those originally sought. The SIM is ran internally (CAPTAIN Administrator and CAPTAIN Data Entry Staff) on every client served and follow up is conducted with clients if/when the SIM identifies client eligibility

or potential eligibility for other services. Currently, LIFT C.A.A. utilizes the Service Integration Matrix (SIM) to assist with case management. The SIM allows CAPTAIN users the ability to provide the client with additional services the client may be eligible for, based on the information reported. CAPTAIN data input staff email a computer-generated referral letter to the client. If the client is readily available, the letter can be given to them in person. This letter lists the possible services the client is eligible for and the contact information for those programs. By utilizing the SIM feature, LCAA program staff have the opportunity to educate and provide individuals/families with as many services as possible, thus improving customers chances of achieving self-sufficiency.

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

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

Prioritized Need 1 – Housing: Decent, safe and affordable housing units is a family level need. The agency is currently addressing this need through the provision of weatherization, packaging of 504 loans/grants and supportive services. The agency also operates the LIFT Self-Help housing program (single family new construction) and provides numerous other housing and housing supportive services for residents. The outcome will be that families are able to secure safe and more affordable housing.

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

FY24 Objective: By 12/31/24, increase numbers of families of low-income receiving housing preservation.

FY24 Strategies: Weatherize 36 homes and package 10(ten) 504 loans/grants

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

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

FY24 Objective: By 12/31/2024, Establish and Strengthen partnerships with service providers (law enforcement, mental health, healthcare, etc.) in the community from baseline of 10-15 partnerships/collaborations.

FY24 Strategies: Secure 5 additional partnerships with local community-based organizations to collaborate and foster sharing of information relevant to substance use/abuse. Attend community meetings and provide education of services, programs, etc. to raise awareness and foster participation.

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

supportive services to help individuals/families improve skills with managing their finances.

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

FY24 Objective: By 12/31/2024, make improvements at local tourist facilities i.e. LIFT operated parks to boost tourism and the local economy.

FY24 Strategies: Secure funding for improvements at Hugo Lake Park/Marina and Hospitality House. Sustain contracts with Department of Tourism to maintain Clayton and Raymond Gary State Parks.

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

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

FY24 Objective: By 12/31/2024, leadership staff will attend and/or participate in trainings, webinars and conferences at 4 events (OKACAA, Region VI, NCAP, CAPLAW, NeighborWorks America, etc.) and 15 Program Directors will attend 3 Directors Meetings/Trainings to increase leadership capacity.

FY24 Strategies: LIFT CAA will host Program Director trainings quarterly and will inform/encourage/support offsite trainings provided by partners,etc..

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

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

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

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

As noted in the logic models for 2024, the prioritized needs which will be the focus for identifying and implementing strategies are: Housing, Substance Abuse Services, Economic/Community Development; and Agency Capacity Building.

Planning

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

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

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

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

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

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

As 2021 was a new Community Needs Assessment year for LIFT CAA and the Community Needs Assessment was completed and approved in January 2022, the new Strategic Plan reflects those needs as identified for the top three. Strategies listed here in the FY2024 CAP plan are reflective of the most recent 2023-2025 Strategic Plan.

The FY23 final logic models with results are uploaded within the application in the pre-award excel workbook.

Evaluate last year's performance (2023) and determine what will be done differently this year (in 2024).

The Final Logic Models for 2023 were presented to the Board during the November 14th, 2023 Board meeting. Specific strategies identified in the logic models were discussed as well as results for each of the top three needs and the agency level need of Capacity Building. They are uploaded within the excel workbook titled Pre-Award Agency Questionnaire.

The presentation of results included outcomes/goals that had been achieved up through October 31, 2023. Therefore, two months was still remaining within the year to achieve stated outcomes. Reports pulled from CAPTAIN and other tracking methods showed that outcomes had been achieved or exceeded for three of the four needs. The economic development objective to host four tourism-related events was achieved at 75%; all others met or exceeded the stated objectives.

The 2024 planning logic models are included within the excel workbook upload titled Pre-Award Agency Questionnaire.

LCAA utilized ODOC's Logic Model Checklist to ensure that the 2024 Logic models include clear outcomes that match the prioritized needs in the C.N.A. which are Housing, Substance Abuse, Economic/Community Development, an Agency need for Capacity Building. The planning logic models are included within the excel workbook uploaded in the application titled Pre-Award Agency Questionnaire.

The target population will be residents of Choctaw, McCurtain and Pushmataha counties of Southeast Oklahoma. For the housing goal to increase housing preservation, the service area will include Atoka, Bryan, Carter, Choctaw, Coal, Johnston, Love, Marshall, McCurtain, Murray, Pontotoc, and Pushmataha counties. The agency will continue to provide the wide array of services available. However, increased efforts to serve the population exhibiting need for one or more of the prioritized needs (housing, substance abuse services, economic/community development) will be a primary target audience. Programs/ services will target individuals and families with low-incomes.

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

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

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

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

More than 700 youth receive direct services through the agency's HS/EHS and Early Head Start/Child Care programs. Eligibility requirements for enrollment in these programs require that a significant percentage of the children enrolled represent

households with low-incomes. These children receive educational services that serve to improve not only their cognitive skills but also social and emotional skills. While in the classroom, they receive healthy nutritious meals and snacks.

Through YouthBuild, youth who are considered at-risk (have dropped out of school, are low-income, are in foster care, etc.) are provided opportunities to increase their vocational and educational skills. This occurs through provision of coursework to prepare these youth to obtain their High School Diploma via Penn Foster online programming as well as vocational skills training in the area of home construction. Through a partnership with LIFT-operated housing programs, the youth provide a service through volunteering at construction/rehab sites while learning the portable skills of home construction. They are also provided opportunities for life skills training and community service/engagement.

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

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

LCAA staff representing various programs work closely with the Southern Workforce Board for the common goal of helping people obtain their vocational goals. One program that partners with Southern Workforce Board is our YouthBuild program. Through the YouthBuild program, a total of 53 youth (ages 16-24) receive services to include preparation for obtaining their High School Diploma and testing as well as vocational skills training relevant to construction. Each of these activities help the youth participants to improve their goals for career development. The YouthBuild program director works with SWB to coordinate additional trainings and skills provided through the WIOA program. We also participate in job/resource fairs by setting up booths and having staff on site to discuss agency programs and job opportunities. Through a new opportunity, WorkReady Oklahoma, LIFT will be providing individuals with job skills training and placement as well as ongoing supportive services for addressing employment needs.

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

In addition, LCAA pursues numerous funding opportunities each year in which partnerships/formal MOU's are entered into with Southern Workforce Board as a

coordinated effort to achieve the stated goals. LCAA and SWB have a long standing and good working relationship.

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

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

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

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

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

For the past thirteen years, LCAA has partnered with International Paper Foundation, civic organizations, residents and other community-based organizations locally to raise funds for the food baskets provided to families during the Thanksgiving and Christmas holiday seasons. On average, more than 50 families receive food baskets annually through these ongoing events which will continue through 2024.

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

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

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

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

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

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

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

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

LIFT Community Action Agency, Inc. is a member of the county coalitions in each county within the agency's service area. The coalitions represent every sector of the community. Members meet monthly and LCAA is well represented at each meeting. LCAA will continue to partner with other entities/organizations, establishing MOU's

when applicable in order to address shared goals to improve the lives of families, especially those with low incomes and to address needs within the service area.

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

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

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

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

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

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

Success will be defined as having achieved at least 75 percent of the stated outcomes as identified in the logic models. Success will also be measured by increased positive feedback from customers as reflected in the customer satisfaction surveys. Success will also involve increased or enhanced services and partnerships that directly address the

prioritized needs (Housing, Substance Abuse Services, and Economic/Community Development). And success will also involve the creation or enhancement of partnerships/collaboration efforts so as to ensure all available resources are being utilized for addressing community needs. LCAA will utilize CAPTAIN and other tracking systems to identify agency staff, board and volunteer training hours to assess agency and stakeholder capacity. Success in terms of agency capacity will equate to adapting to virtual training and volunteer activities in order to acquire and/or sustain capacity. Agency Capacity success for 2024 will also be measured by number of staff/events attended to increase leadership capacity.

Implementation

Sections of the CAP such as Logic Models, PMO spreadsheet, that clearly show specific strategies will be shared across programs, with leadership and the Board. These sections will serve as the “roadmap” to help program staff stay on track with working towards the goals and objectives. The entire CAP plan will be shared by email, in paper format, through discussion, etc. with leadership (including Board members), program directors, supervisors, front-line and support staff. This will ensure that all staff are aware of the expected outcomes identified within the CAP for FY2024 which will be a primary focus of agency activities over the year. It will be discussed in detail with Board members who will all be provided copies. Review and analysis of the CAP will occur no less than twice a year for outcome reports and quarterly through customer reports presented to staff and board.

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

LCAA operates several programs that provide case management including Lending, Head Start, Early Head Start, Early Head Start-Child Care Partnership, Healthy Start, Housing and more. Case management is provided to clients seeking loan funds to help them become loan eligible; services would include credit counseling, budgeting, financial coaching, etc.; Case management is provided to parents/primary caregivers of HS/EHS and EHS/CC youth by Family Advocates working with each family towards setting and achieving goals. Case management is also provided by Housing Coordinators with clients seeking housing services. In the area of housing, case management may involve provision of credit counseling as well as helping families work with creditors to reduce debt (in some cases, having debt written off); budgeting; saving; financial fitness; refinancing home loans to reduce interest rates and more. The housing counselors maintain regular contact with the customers to encourage them and help them “stay on track” so as to increase their chance to improve their current financial situation. The goal is to reduce

debt, increase income and become more self-sufficient. Healthy Start clients receive case management through follow up activities provided by the care coordinators to ensure that health screening appointments were kept as well as other activities that serve to support the program goals. Other program participants receive case management via the applicable program staff which serves to facilitate continued participation.

In prior years, the risk assessment report was utilized to assist with case management to help determine the needs of each individual/family requesting services. This report helped the case worker identify the services needed and/or the referrals required in order for the individual/family to be provided with all the assistance and services needed.

However, CapSystems, in their work to transition CAPTAIN into ROMA NG (next generation) and in their meetings with Commerce and/or CAP agencies decided to build the pre-assessment questions into the client intake screens.

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

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

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

are program specific and required. All programs are represented on some level in CAPTAIN.

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

Customer Satisfaction is collected via a Customer Satisfaction Survey. The survey identifies the department from which the customer sought and/or received services. It offers three choices to identify “level of satisfaction which includes: “Very Satisfied” “Somewhat Satisfied” or “Not Satisfied”. The survey encourages customers to elaborate and leave feedback for ways the agency could improve upon service provision. The survey also collects demographics i.e. gender, age ranges, race and ethnicity. All customer satisfaction surveys, whether completed online or on paper are maintained by the ROMA/CSBG Administrator. She inputs all responses into one database and provides quarterly reports to the Board and leadership on the analysis of the surveys. This includes rate of return by program and county reporting; response percentages on levels of satisfaction, etc.

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

Observations of Results and Reporting the Achievement of Results

Data will be collected by assigned/appropriate data collection staff in each program and for each need identified in the logic models. This data comes from client intake forms and is transferred into CAPTAIN and/or other tracking systems. Data/outcomes will be reviewed monthly by the CAPTAIN administrator. The CAPTAIN administrator shares reports with program staff on a monthly basis and with the Board no less than once per year. Logic models are included for both FY23 Final and FY24 Planning within the Pre-Award Agency Questionnaire excel workbook.

Information for the CSBG Annual report comes primarily from CAPTAIN reports. The information is used to help better understand who represents the agency’s clients; to ensure services are being targeted and provided to the target audiences of individuals/families with low-incomes; as a tool for decision making and planning

purposes. The CAPTAIN administrator will share annual report data with leadership, board and staff. Initial data input occurs at the program level by assigned and trained CAPTAIN data entry personnel. Financial modules are completed by the fiscal department. Additionally, the ROMA/CSBG Administrator works with program staff to set targets, etc.

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

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

Analysis of Data and Evaluation

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

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

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

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

Performance evaluation is ongoing throughout the year. However, a more formal evaluation is conducted towards the end of the year in preparation for completion of the CSBG Annual Report, Board Trainings/Reports; Review of the CAP and Strategic Plans, etc. The final formal performance evaluation for 2023 began in October of 2023 and started with a review of the logic models. The next step was to generate CAPTAIN and other reports to determine if the stated outcomes within the logic models had been met. The logic models with results were shared with leadership, front-line staff, directors and the Board. Also, a review by staff over the performance measurement outcomes was completed. This occurred initially with the CAPTAIN administrator, planning director, front-line staff and leadership. Each program was reviewed and Program Directors as well as front line staff provided updates as to challenges, opportunities, etc. that were faced by their respective programs.

The Planning Director and the CAPTAIN Administrator held several in-depth discussions with program staff to determine if all outcomes that can be captured were being captured and if any additional data needed to be added for tracking. This is considered “Program Level Evaluation.” Evaluation analysis reports over program outcomes were provided to the board on November 14, 2023 by the CAPTAIN Administrator. No significant changes will occur.

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

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

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

Performance goals will be revised based on actual results if/when there exists a significant variance between the two. Again, this would only occur after a thorough review/analysis to determine why the variance exists. If actual results are lower than goals, an analysis of outreach efforts, staffing, and any other causes leading to the variance would be thoroughly reviewed prior to adjusting the goals. This type of analysis could reveal there is simply a need to increase marketing of a specific program etc.

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

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

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

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

App#	Name	Case Type	Service	Service Date	Outcome	Date
00000030	CHOCTAW/PUSHMATAHA COUNTY YOUTH SERVICES	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000031	DEPARTMENT OF HUMAN SERVICES CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	10/04/2023	B.5k. - Health Service Organizations	10/04/2023
00000032	DEPARTMENT OF HUMAN SERVICES MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	10/04/2023	B.5k. - Health Service Organizations	10/04/2023
00000033	DEPARTMENT OF HUMAN SERVICES PUSHMATAHA COUNTY	Community Partner	Community-Wide Partnerships	10/04/2023	B.5k. - Health Service Organizations	10/04/2023
00000037	KIAMICHI TECHNOLOGY CENTER CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	10/04/2023	B.5i. - Institutions of Post-Secondary Education/Training	10/04/2023
00000044	SOS FOR FAMILIES	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000045	OSU EXTENSION CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	10/04/2023	B.5i. - Institutions of Post-Secondary Education/Training	10/04/2023
00000064	HUGO POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000142	HOUSING & URBAN DEVELOPMENT	Community Partner	Community-Wide Partnerships	11/08/2023	B.5g. - Consortiums/Collaborations	11/08/2023
00000143	HOUSING ASSISTANCE COUNCIL	Community Partner	Community-Wide Partnerships	11/08/2023	B.5g. - Consortiums/Collaborations	11/08/2023
00000146	MICHELE APLIN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000153	MARY BLANKENSHIP DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000159	STACEY BURCHFIELD DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000161	MELANIE CADY DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000165	WENDY CLIFTON DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000167	TRACY COHEE DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000171	TERI DALLIS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000173	ELAINE DEAN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000174	SHIRLEY LEWIS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000175	KIM DEMAS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000176	BRENDA DERVIN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000179	RESHONE EGGLESTON DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000181	TAMMY FINES DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000188	AMBER GARCIA DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000191	JANELLE GILBERT DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023

00000192 CYNTHIA GODWIN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000193 CHRISTINA GOOCH DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000194 BRENDA GREEN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000195 SANDRA GRIMSLEY DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000197 LISA HAMILTON DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000198 ROSANN HANES DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000203 ROSA HERNANDEZ DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000204 JENNIFER HIGNIGHT DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000205 SONYA HILL DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000206 JENIFER HOOD DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000210 KIM JOHNSON DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000213 LAMARA JONES DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000216 KRISTIE LAMBERT DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000218 TAMMY LEE DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000219 SHELLY LEIGH DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000222 MARIA LOPEZ DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000223 MYNISHIA MALONE DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000224 CAROLYN MANN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000227 LASHAWN MARTIN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000229 EDIE MARTZALL DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000230 LUELLEN MCCLESKEY DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000239 CARRIE MORENO DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000242 HEIDI MULLER DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000248 TERESA PERRIN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000250 CECELIA PILGRIM DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023

00000251 STACI POLLARD DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000252 CAROLYN PULLEN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000254 CAROL RANKIN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000255 PAM REDFORD DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000257 BRIDGET RICHARDS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000264 RACHELLE SANDERS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000265 THERESA SHIRLEY DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000266 VICTORIA SISSOM DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000267 LATOSHA SLOAN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000269 ANGELA SMITH DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000278 MELISSA TAYLOR DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000279 JULIE TUCKER DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000280 KENYETTA TURNER DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000281 YOLANDA TURNER DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000282 KAMI TYLER DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000284 CHRISTY VUNETICH DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000287 LISA WALSTON DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000288 TAMMY WARD DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000289 KIMBERLY WATSON DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000290 TINA WEAVER DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000295 SHERRY WILLIAMS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000298 BERNITA WILSON DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000314 GARY DUVALL DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000335 OKLAHOMA STATE DEPARTMENT OF EDUCATION	Community Partner	Community-Wide Partnerships	11/16/2023	B.5d. - State Government	11/16/2023
00000336 CITY OF ANTLERS	Community Partner	Community-Wide Partnerships	11/08/2023	B.5c. - Local Government	11/08/2023
00000337 CITY OF HUGO	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000338 CITY OF IDABEL	Community Partner	Community-Wide Partnerships	11/08/2023	B.5c. - Local Government	11/08/2023

00000340 OKLAHOMA ASSOCIATION OF COMMUNITY ACTION AGENCIES	Community Partner	Community-Wide Partnerships	11/08/2023	B.5l. - Statewide Associations or Collaborations	11/08/2023
00000343 OKLAHOMA HEALTH CARE AUTHORITY	Community Partner	Community-Wide Partnerships	11/08/2023	B.5k. - Health Service Organizations	11/08/2023
00000349 SOUTHEASTERN OKLAHOMA STATE UNIVERSITY	Community Partner	Community-Wide Partnerships	10/04/2023	B.5i. - Institutions of Post-Secondary Education/Training	10/04/2023
00000362 INCA COMMUNITY SERVICES	Community Partner	Community-Wide Partnerships	11/08/2023	B.5a. - Non-Profit	11/08/2023
00000380 OKLAHOMA HOUSING FINANCE AGENCY	Community Partner	Community-Wide Partnerships	11/08/2023	B.5l. - Statewide Associations or Collaborations	11/08/2023
00000388 LIFT TRANSIT SYSTEM	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000392 CASA- LIFT	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000396 MEN UNITED	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000411 UNIVERSAL HOUSING DEV CORP RUSSELLVILLE, AR	Community Partner	Community-Wide Partnerships	11/08/2023	B.5a. - Non-Profit	11/08/2023
00000419 FAMILY RESOURCES OF N.O. INC NEW ORLEANS, LA	Community Partner	Community-Wide Partnerships	11/08/2023	B.5a. - Non-Profit	11/08/2023
00000436 PUSHMATAHA COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000437 CHOCTAW COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000438 MCCURTAIN COUNTY COALITION	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000439 ANTLERS MASONIC LODGE	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000440 CHRISTIAN LIFE OUTREACH MINISTRIES	Community Partner	Community-Wide Partnerships	10/04/2023	B.5b. - Faith Based	10/04/2023
00000444 CHOCTAW NATION	Community Partner	Community-Wide Partnerships	10/04/2023	Tribal Government	10/04/2023
00000445 PUSHMATAHA COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000446 CHOCTAW COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000447 MCCURTAIN COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000448 PUSHMATAHA COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000449 CHOCTAW COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000450 MCCURTAIN COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000451 PUSHMATAHA COUNTY COURTS	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000452 CHOCTAW COUNTY COURTS	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000453 MCCURTAIN COUNTY COURTS	Community Partner	Community-Wide Partnerships	10/04/2023	B.5c. - Local Government	10/04/2023
00000454 THE CAMPBELL GROUP	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000474 KIAMICHI OPPORTUNITIES INC	Community Partner	Community-Wide Partnerships	11/08/2023	B.5a. - Non-Profit	11/08/2023
00000475 LIFT HEAD START	Community Partner	Community-Wide Partnerships	10/04/2023	B.5a. - Non-Profit	10/04/2023
00000480 FEDERAL HOME LOAN BANK	Community Partner	Community-Wide Partnerships	11/08/2023	B.5j. - Financial/Banking Institutions	11/08/2023
00000482 LARISSA LOTT DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000490 GRETТА EVANS DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000493 KARON TEURMAN DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023
00000496 MONTTOYA BOAZ DCH	Community Partner	Community-Wide Partnerships	11/16/2023	B.5f. - For-Profit Business or Corporation	11/16/2023

00000497 ANNA WHITE DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000550 BROKEN BOW POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/04/2023 B.5c. - Local Government	10/04/2023
00000553 PROJECT GAIN	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000557 UNITED STATES DEPT. OF AGRICULTURE	Community Partner	Community-Wide Partnerships	11/08/2023 B.5e. - Federal Government	11/08/2023
00000565 MEGAN HORN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000569 CHARLESIA KOSANKE DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000570 LATOYA BILLS	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000574 RED RIVER HOOPS CLUB	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000576 OKLAHOMA CASA	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000577 NATIONAL CASA	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000578 PUSHMATAHA COUNTY SHERIFF DEPARTMENT	Community Partner	Community-Wide Partnerships	10/04/2023 B.5c. - Local Government	10/04/2023
00000579 MCCURTAIN COUNTY SHERIFF DEPARTMENT	Community Partner	Community-Wide Partnerships	10/04/2023 B.5c. - Local Government	10/04/2023
00000580 KIDS KOTTAGE	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000582 THE MASONS OF ANTLERS	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000583 THE MASONS OF TUSKAHOMA	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000586 NEW BEGINNINGS	Community Partner	Community-Wide Partnerships	10/04/2023 B.5b. - Faith Based	10/04/2023
00000624 NEIGHBORWORKS AMERICA	Community Partner	Community-Wide Partnerships	11/08/2023 B.5e. - Federal Government	11/08/2023
00000627 PENNEY RODGERS	Community Partner	Community-Wide Partnerships	10/04/2023 B.5f. - For-Profit Business or Corporation	10/04/2023
00000644 OKLAHOMA DEPARTMENT OF COMMERCE	Community Partner	Community-Wide Partnerships	11/08/2023 B.5d. - State Government	11/08/2023
00000645 OKLAHOMA ATTORNEY GENERALS OFFICE	Community Partner	Community-Wide Partnerships	10/04/2023 B.5d. - State Government	10/04/2023
00000647 CRYSTEL BURDEN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000649 DESTINY SANDERS DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000651 KATRINA PICKETT DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000656 MAGGIE MONROE DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000660 SUSAN HOYLE DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000661 Waweeta Conchitias DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000678 JENNIFER DUNCAN DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000680 TANYA REVELS DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000682 KELSIE KELLEY DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000694 CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000695 NORTHWEST REGIONAL HOUSING AUTHORITY	Community Partner	Community-Wide Partnerships	11/08/2023 B.5c. - Local Government	11/08/2023
00000696 NORTHEAST COMMUNITY ACTION CORPORATION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023

00000697 NATIONAL RURAL HOUSING COALITION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000698 SOUTHWEST REGIONAL HOUSING AND CDC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000699 TIERRA DEL SOL HOUSING CORPORATION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000700 ZUNI HOUSING AUTHORITY	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000701 TRI-COUNTY INDIAN NATIONS CDC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000702 INTER-LAKES COMMUNITY ACTION PARTNERSHIP, INC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000703 COMMUNITY DEVELOPMENT CORPORATION OF BORWNSVILLE	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000704 PROYECTO AZTECA, INC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000705 LOWER VALLEY HOUSING CORPORATION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000706 NATIONAL RURAL SELF-HELP HOUSING ASSOCIATION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000715 LIFT SELF-HELP HOUSING	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000736 FELECIA JONES	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000737 CHASITIE WOLFE	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000738 AURIEL GREEN	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000739 WHITNEY HARRIS	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000742 SOUTHERN WORKFORCE BOARD	Community Partner	Community-Wide Partnerships	10/04/2023 B.5a. - Non-Profit	10/04/2023
00000743 BIG 5 COMMUNITY ACTION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000744 CHOCTAW ELECTRIC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5f. - For-Profit Business or Corporation	11/08/2023
00000746 COMMUNITY RESOURCE TECHNICIAN, INC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000747 KOESTER NON PROFIT SERVICES	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000748 LIBERTY RESTORATION COMMUNITY DEVELOPMENT	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000749 INTEGRITY HOMEBUYERS ASSOCIATION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000750 HABITAT FOR HUMANITY ST. TAMMY WEST	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000751 DELTA AREA ECONOMIC OPPORTUNITY CORP.	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000752 HIGH PLAINS COMMUNITY DEVELOPMENT CORP.	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000753 BLUE VALLEY COMMUNITY ACTION	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000754 NEIGHBORWORKS NORTHEAST NEBRASKA	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000755 HELPING HANDS NOW	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000756 NEIGHBORHOOD HOUSING SERVICES OF OKC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000757 NEIGHBORHOOD HOUSING SERVICES OF WACO, INC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000758 FAMILY DESTINY	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000759 ED 360	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000760 SOUTHEAST NEBRASKA DEVELOPMENT DISTRICT	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000761 USDA RURAL DEVELOPMENT	Community Partner	Community-Wide Partnerships	11/08/2023 B.5e. - Federal Government	11/08/2023

00000770 JESSICA STEWART DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000772 AMANDA CLEEK DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000773 KALEIGH STRICKLAND DCH	Community Partner	Community-Wide Partnerships	11/16/2023 B.5f. - For-Profit Business or Corporation	11/16/2023
00000774 OKLAHOMA DISTRICT ATTORNEY COUNCIL	Community Partner	Community-Wide Partnerships	10/04/2023 B.5d. - State Government	10/04/2023
00000775 CHOCTAW COUNTY SHERIFF OFFICE	Community Partner	Community-Wide Partnerships	10/04/2023 B.5c. - Local Government	10/04/2023
00000776 IDABEL POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/04/2023 B.5c. - Local Government	10/04/2023
00000777 ANTLERS POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	10/04/2023 B.5c. - Local Government	10/04/2023
00000778 MAGNOLIA CDC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000779 LAKE AREA CDC	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000784 CARE ONE ADVOCATE	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000785 AHAYAH COMMUNITY DEVELOPMENT CORP	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000786 B.R.A.C.E.S .	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000787 DECHELLES HOUSE	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000788 TANGI COMMUNITY DEVELOPMENT CORP	Community Partner	Community-Wide Partnerships	11/08/2023 B.5a. - Non-Profit	11/08/2023
00000789 TAMMIE HOGAN DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000790 MINDY MUDGETT DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000791 ASHLEY HOWARD DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000792 BRENDA SUMPTER DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000793 REGINA BIRDSONG DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000794 TAMIERA MARTIN DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000795 ALICIA MCKEE DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000796 ANYAAE GENTRY DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000797 XOCHILT MALDONADO DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000798 WHITNEY RODGERS DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000799 RAEKEISHA WATKINS DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000800 TAMI JOHNSTON DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000801 CASSANDRA CARR DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000802 MARSHALYNN JEFFRIES DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000803 KEESHA COFFEY DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000804 KORTNEY HELMS DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023

00000805 TIFFANY POSEY DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000806 YOLANDA LEE DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000807 LADONNA MUSTAPHEB DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000808 CATHY RUTHERFORD DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000809 CHERLANDRA FLETCHER DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000810 YVETTE SNELL DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023
00000811 RACHEL GOIN DCH	Community Partner	Community-Wide Partnerships	11/13/2023 B.5f. - For-Profit Business or Corporation	11/13/2023

LIFT COMMUNITY ACTION AGENCY, INC.'S Strategic plan

2023-2025



Board Approved:

EXECUTIVE SUMMARY

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

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

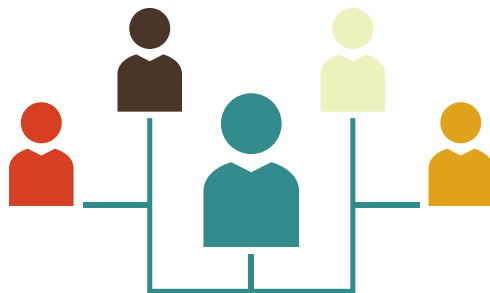
Key staff involved in facilitating the strategic planning process attended conferences and trainings presented by National Community Action Partnership staff. The presenters trained participants on how to incorporate ROMA and how to make sure the plan represents compliance with the Community Service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

The development of this plan involved multiple processes which included:

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

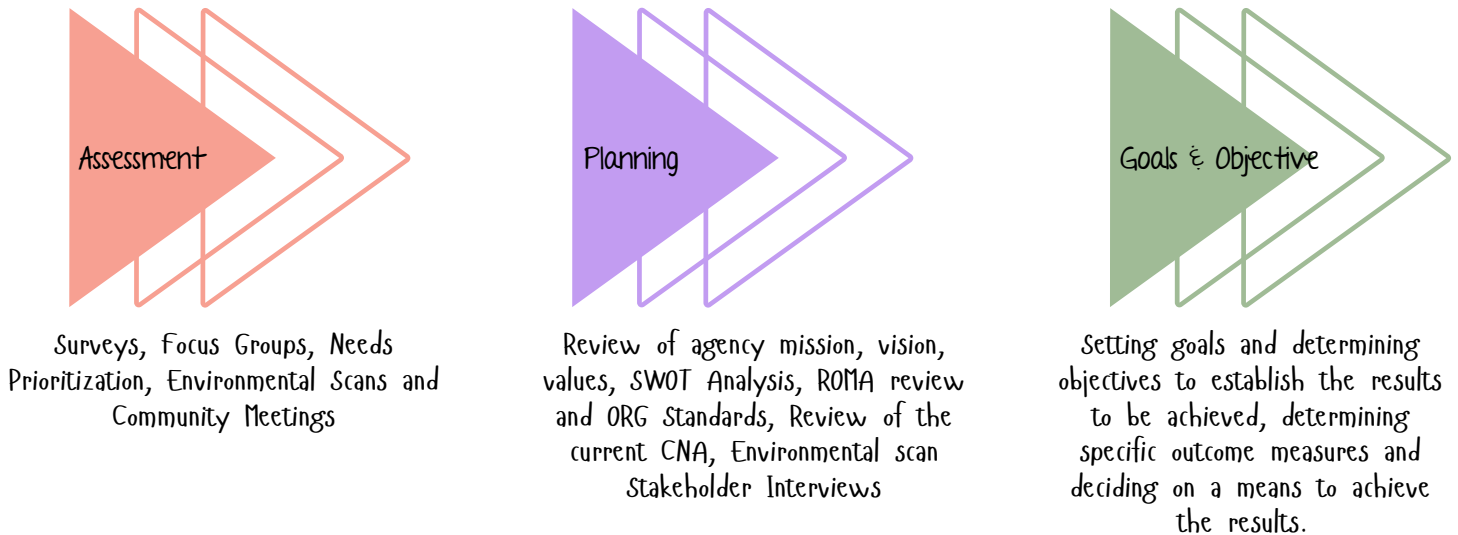
Each process resulted in reviewing and analyzing qualitative and quantitative data. These activities helped with the development of the strategies and benchmarks listed within this plan.

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



STRATEGIC PLANNING PROCESS

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



Assessment

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

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

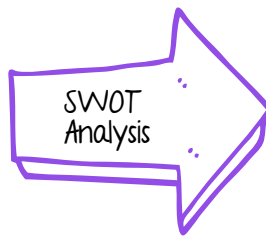
- Housing: Availability of safe, decent and affordable housing is lacking throughout the entire service area.
- Substance Use/Abuse: There is a need for supportive services to address substance use/abuse
- Economic/Community Development; There is a need to improve the local economy to boost economic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

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

Planning



Revisited Agency Mission, Vision and Core Values: Conducted Stakeholder interviews



Conducted Strengths, Weaknesses, Opportunities and Threats activity with Board



Reviewed ROMA model and ORG Standards to ensure alignment with Strategic Plan



Reviewed 2022 CNA report: Conducted updated environmental scan

AGENCY REVIEW

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

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

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

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

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

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

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

SWOT ANALYSIS

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

Internal

Strengths:

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

Weaknesses:

- Staff Turnover/shortages
- Low Pay Scale
- Lack of service awareness in some programs
- Lack of diversity
- Unskilled workforce

External

Opportunities:

- Multiple Marketing platforms
- Partnerships
- Non-Profit Federal, State and foundation funding streams.
- Strong and large Volunteer base
- Community support and buy-in

Threats:

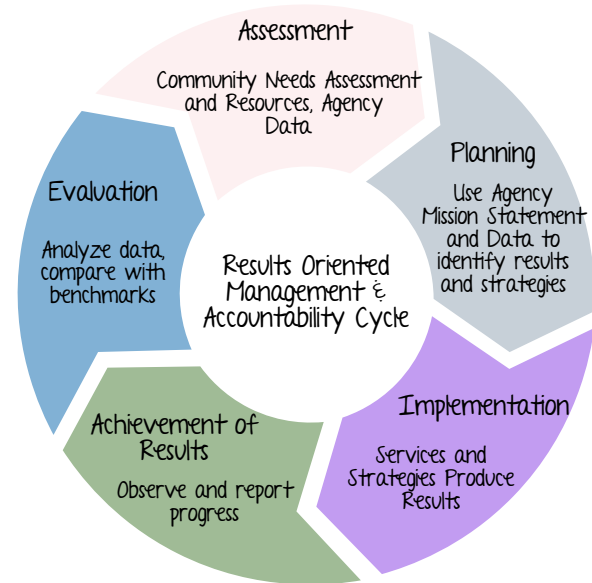
- Competition for Funding
- Government Changes
- Funding and program reductions and/or cuts
- Inflation
- Challenges with staying competitive

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RESULTS ORIENTED MANAGEMENT & ACCOUNTABILITY (ROMA)

Strategic planning is a key component and embodiment of Results Oriented Management and Accountability. As a component of ROMA, strategic planning constitutes the second phase of the ROMA cycle, planning. However, the strategic planning process itself moves through all five ROMA phases, hence embodying the entire cycle.



ROMA and the Org standards the framework and guidance for community action agency's to achieve not only their community goals but the three national community action network goals. The National Community Action Network Goals reflect what Community Action Agencies hope to achieve over a long-term period for individual, families and communities of low-income. Goals incorporated into LIFT's Strategic Plan are reflective of the National Community Action Network Goals listed below.

NATIONAL COMMUNITY ACTION NETWORK GOALS



ORGANIZATIONAL STANDARDS

CSBG Organizational Standards represent important minimum thresholds to ensure Community Action Agencies have the needed capacity to serve America's communities. The full implementation of the principles and practices articulated in the Organizational Standards assures a consistent and strong CSBG network. Below are the Organizational Standards set forth under the CSBG Act which mandates the required components of the strategic planning process and reinforces the need to assess internal functioning as well as the needs of the communities we serve. The goals and objectives, within this Strategic Plan, are reflective of the agency's future in conjunction with the requirements of the Organizational Standards.

Primary Org Standards for Strategic Planning

- OS 6.1 - The organization has an agency-wide Strategic Plan in place that has been approved by the governing board in the last 5 years.
- OS 6.2 - The approved Strategic Plan addresses the reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low-incomes to become more self-sufficient.
- OS 6.3 - The approved Strategic Plan contains Family, Agency, and/or Community Goals.
- OS 6.4 - Customer Satisfaction and customer input, collected as part of the Community Assessment, is included in the strategic planning process.
- OS 6.5 - The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.

Other Org Standards related to Strategic Planning

- OS 1.1 – The organization demonstrates low-income individuals participation in its activities.
- OS 1.2 – The organization analyzes information collected directly from low-income individuals as part of the community assessment.
- OS 1.3 – The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.
- OS 4.1 – The governing board has reviewed the organizational mission statement within the past 5 years and assured that: 1) the mission addresses poverty and: 2) the organization programs and services are in alignment with the mission.
- OS 4.3 – The organization's Strategic Plan documents the continuous use of the full ROMA cycle. In addition the organizations documents having used the services of a ROMA certified trainer to assist in implementation.
- OS 9.3 – The organization has presented to the governing board for review or action, at least within the past 12 months, an analysis of the agencies outcomes and any operational or strategic program adjustments and improvements identified as necessary.

COMMUNITY NEEDS ASSESSMENT

As part of the planning process key leadership reviewed key findings and results from the 2022 Community Needs Assessment. LIFT's Community Needs Assessment identifies and prioritizes the needs and resources of individuals and families in our service area. Key leadership use this data to design effective, outcome-based programs that strive to alleviate poverty. The analyzed data is summarized below.

Top 3 Prioritized Needs Identified



Housing



Substance Abuse
Services



Economic
Development

506 Surveys Completed

22	community sector
200	low-income individuals
11	educational sector
7	faith-based sector
5	government sector
5	private sector
186	public sector
238	agency clients
25	board members
7	agency volunteers

Poverty Statistics

21.95%	15.1%	12.16%
Service Area	State of Oklahoma	United States

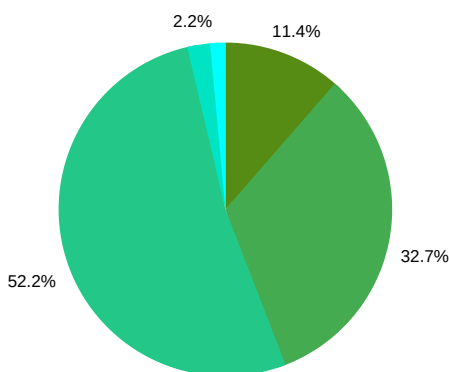
Top 10 Needs Identified

Housing	Youth Services
Early Childhood Services	Senior Services
Emergency Services	Substance Abuse Services
Health Services	Nutrition
Transportation	Asset Development

CUSTOMER SATISFACTION & INPUT

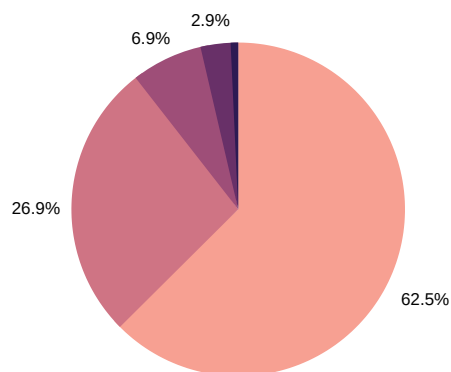
As part of the planning process, the Board reviewed the customer satisfaction data from 2022. Customer Satisfaction data and input is a critical piece to the overall Strategic Plan. The ongoing collection and analysis of customer satisfaction surveys will remain key to LIFT CAA's plan being representative of the full ROMA cycle. Customer Satisfaction surveys are collected on an ongoing basis including paper and online surveys. All surveys are directed to the ROMA Coordinators attention and transferred to an agency database. LIFT's Board of Directors is provided with quarterly updates regarding the number of surveys collected for the reporting period, program and/or programs for which customers completed surveys, responses and percentage of each and analysis of internal and external factors and their actual or potential impact on the survey responses. Results of the 276 Customer Satisfaction Surveys, collected in 2022, were reviewed and analyzed in comparison to the input gathered in the previous phases of the planning process.

County Breakdown



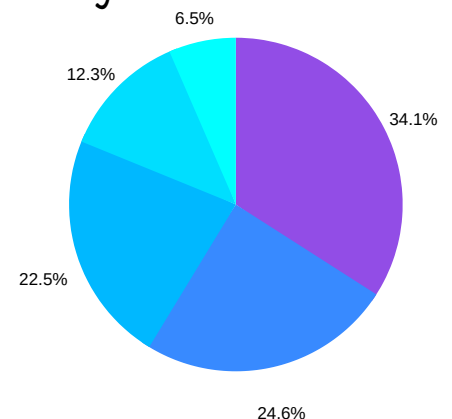
Bryan County - 1.7%
 Choctaw County - 52.2%
 Pushmataha County - 11.4%
 McCurtain County - 32.7%
 Other - 2.0%

Method of Awareness



Billboard - .8%
 Friend - 62.5%
 Internet - 6.9%
 Other - 26.9%
 Radio - 2.9%

Age Breakdown



18 to 30 - 34.1%
 31 to 50 - 24.6%
 51 to 65 - 22.5%
 66+ - 12.3%
 18 and under - 6.5%

Surveys Completed by each Program

125	69	21	23	18	20
HeadStart	VITA	Apartments	Emergency Assistance	WX	Other Programs

GOALS & OBJECTIVES

On Thursday, September 22, 2022 key leadership staff enlisted the assistance of Strategic Planning Consultant and Nationally Certified ROMA Trainer – Julia Teska, PhD to determine priorities and establish goals. Collectively the group discussed the conclusions from the 2022 Community Needs Assessment (CNA), Customer Service/Input, Agency Review and SWOT Analysis. The group was asked to provide insight pertaining to the key findings within each of these resources. The group discussed correlations, variances and other factors within these reports. Ultimately, the group developed specific measurable, achievable, relevant and time bound (SMART) goals and objectives which the agency will focus its efforts in order to address the needs of the communities served.

PRIORITY NEEDS

This strategic plan will identify activates and strategies for achieving the goals that align with the needs identified in the 2022 CNA report. The needs represent family, community and agency level needs. The focus of this Strategic Plan will be on program development and its direct relation to improving the lives of low-income individuals.

Need One: Our community has a need for increased safe, decent and affordable housing.

Need Two: Our community has a need for additional substance use/abuse resources and supportive services.

Need Three: Our community has a need for community and economic development opportunities to improve our local economy.

Need Four: Our agency has a need to increase capacity to better serve the needs of our community.



Goal 1: Family

To increase housing and housing supportive services for residents in our service area.

Goal 2: Community

Reduce substance use and abuse and improve community awareness.

Goal 3: Community

To improve our local economy and help families move towards self-sufficiency.

Goal 4: Agency

To increase our capacity to better serve individuals and families of low-income.

#1 HOUSING

Our community has a need for increased safe, decent and affordable housing.

Goal

To increase housing and housing supportive services for residents in our service area.

Objective 1

Increase number of new single and multifamily housing units.

Objective 2

Increase number of families receiving housing preservation.

Objective 3

Increase lending resources for mortgage loans.

Strategies

Measures & Benchmarks

Objective 1: Increase number of new single and multifamily housing units.

- Submit grant applications for housing opportunities.(single family/multi-family)
- strengthen relationships and partnerships with other housing entities.
- Help families become loan eligible.

- Submit one federal application each year for housing construction funding.
- Construct 3 multi-family units by December 2025.
- Create and/or Strengthen partnerships/MOU's with 2 housing entities by December 2024.
- Provide Housing Counseling to 200 families annually by the end of each calendar year.

Objective 2: Increase number of families receiving housing preservation.

- Provide housing weatherization for families of low-income.
- Assist families with obtaining minor/moderate housing rehab.
- Provide housing education on maintenance and preservation of homes.

- Weatherize 36 homes annually during each calendar year.
- Package 10 504 loans/grants annually during each calendar year.
- Provide housing maintenance/preservation to 30 families annually during each calendar year.

Objective 3: Increase lending resources for mortgage loans.

- Provide T&MA to non traditional lenders.
- Assist lenders in making application for CDFI certification.
- Assist lenders with locating funding resources.

- LIFT Board, loan and housing staff provide 12 T&MA trainings to SOCDC Board by December 31 2023 and ongoing as needed.
- LIFT loan officer assist SOCDC in applying for CDFI certification.
- Transfer/sale existing LIFT mortgage loans to SOCDC by June 30 2024.
- SOCDC secures 1 Angel investor by December 2024.
- SOCDC CDFI fully operational by December 2025.

#2 Substance Abuse

Our community has a need for additional substance use/abuse resources and supportive services.

Goal

Reduce substance use and abuse and improve community awareness.

Objective 1

Increase community resources and access to substance use/abuse information and services.

Objective 2

Establish and strengthen partnerships and collaborations in the community.

Objective 3

Provide education and case management to individuals and families impacted by substance use/abuse.

Strategies

Objective 1: Increase community resources and access to substance use/abuse information and services.

- Encourage partners to share information.
- Create informational flyers/brochures with facts of substance use/abuse.
- Utilize social media and other platforms to share information.

Objective 2: Establish and strengthen partnerships and collaborations in the community.

- Attend various community organizations meetings and explain purpose
- Provide education of services and programs to organizations to promote awareness
- Increase organization participation

Objective 3: Provide education & case management to individuals/families impacted by substance use/abuse.

- Provide case management.
- Partner with law enforcement to gain access to inmates and other at risk individuals.
- Collaborate with area schools to host drug prevention events

Measures & Benchmarks

- Community based organizations collaborate with LIFT on 5 events annually each calendar year.
- 500 informational flyers/brochures distributed to residents annually each calendar year. .
- Share information and promote 10 events in local papers, social media and radio annually each calendar year.

- Three additional LIFT Employees serve on county coalitions annually each calendar year.
- Conduct 6 awareness events at schools, jails and/or other community venues annually during each calendar year.
- Collaborate with community based organizations to conduct three events that address substance use/abuse annually each calendar year

- Provide case management to 250 individuals through second chance by December 2024.
- Provide life skills education classes to 15 inmates annually each calendar year.
- Provide 500 youth with prevention awareness information annually each calendar year.

#3 Economic Development

Our community has a need for community and economic development opportunities to improve our local economy.

Goal

To improve our local economy and help families move towards self-sufficiency.

Objective 1

Increase tourism activities to promote local economy.

Objective 2

Improve local tourist facilities.

Objective 3

Increase and improve recreational amenities.

Strategies

Measures & Benchmarks

Objective 1: Increase tourism activities to promote local economy.

- Plan and host events.
- Partner with community stakeholders.
- Promote area attractions.

- Hold 4 recreational events at LIFT operated parks annually each calendar year.
- Create 1 tourist planning committee representative of multiple organizations by December 2024.
- Use social media to Promote 9 local tourist attractions annually each calendar year.

Objective 2: Improve local tourist facilities.

- Secure funding for cabin/hospitality house improvements.
- Partner with local community stakeholders.

- Rehab 4 house keeping cabins at Hugo Lake by December 31 2025.
- Complete renovations at hospitality house by December 31 2024.
- Secure donations from 5 local organizations/businesses by December 31 2025.

Objective 3: Increase and improve recreational amenities.

- Make improvements at Hugo Lake Marina.
- Repair infrastructure at Hugo Lake Park
- Increase amenities at Hugo Lake Park

- Replace/repair walkway leading to marina at Hugo Lake by December 31 2023
- Repair boat ramps and pavilions at 3 locations in Hugo Lake Park by December 31 2024
- Construct playground at Hugo Lake Park by December 31 2025

#4 Agency Growth

Our agency has a need to increase capacity to better serve the needs of our community.

Goal

To increase our capacity to better serve individuals and families of low-income.

Objective 1

Improve employee satisfaction to reduce turnover

Objective 2

Increase employee capacity for enhanced service provision

Objective 3

Increase annual budget to address community needs

Strategies

Objective 1: Improve employee satisfaction to reduce turnover

- Employee appreciation events.
- Improve working environment.
- Stress reduction activities.

Objective 2: Increase employee capacity for enhanced service provision

- Attend trainings/conferences.
- Participate in webinars.
- Staff attend leadership meetings.

Objective 3: Increase annual budget to address community needs

- Seek funding opportunities.
- Increase revenues.

Measures & Benchmarks

- Recognize 12 outstanding employees annually each calendar year.
- Supervisors and staff participate in 1 EDI training quarterly during each calendar year.
- LIFT office locations plan and carryout 1 stress reduction activity monthly each calendar year.

- 10 employees attend 2 trainings/conferences annually each calendar year.
- 250 employees participate in weekly webinars/teams meetings annually each calendar year.
- 20 Program Directors attend 4 Program Directors meetings annually each calendar year.

- Secure one new grant for new program start up or expansion of existing program annually each calendar year.
- Agency program revenue increase by 5% by December 31 2025. (Baseline \$22,483,114.)

PLAN IMPLEMENTATION & ACCOUNTABILITY

LIFT CAA's Board approved 2023-2025 Strategic Plan will be shared with all program staff to ensure awareness of the key goals and objectives outlined in the Strategic Plan. The plan will be available on the agency's website and distributed to all staff via email.

The Strategic Plan will be implemented by program staff and leadership with direction and guidance from LIFT CAA's Board of Directors. Community Partners, funders and other stakeholders will also be key to plan implementation.

Leadership staff, led by LCAA's Executive Director, will align program plans and budgets with the strategic plan and will devote time each quarter to review implementation progress and progress made toward achieving the goals outlined in this plan. Quarterly reviews will provide opportunities to address any challenges or barriers faced towards achieving program-respective objectives. This will help encourage staff accountability.

LIFT's Board of Directors will be provided with updates on progress towards achieving objectives outlined in the Strategic Plan no less than once a year.

This process of analysis and evaluation will allow programs the chance to make revisions as necessary based upon current community conditions.

CONCLUSIONS

The goals and objectives identified in LCAA's 2023 - 2025 Strategic Plan align with the needs identified in the 2022-2024 Community Needs Assessment. These prioritized needs include Housing, Substance use/Abuse Services, and Community & Economic Development Activities. This Strategic Plan represents input from all stakeholders including residents, front line staff, leadership and key partners. As a living document, this plan requires a strong commitment by all to act on the goals, monitor the implementation and evaluate effectiveness. Internal and external communication is critical to effectively execute the strategies identified. The implementation strategies require focus and attention from senior leadership and all employees involved to ensure the needs are addressed and progress is made.

LIFT PROGRAMS & SERVICES

Child & Adult Care Food Program
Court Appointed Special Advocates
Drug Free Communities Support Program
Early Head Start
Early Head Start - Child Care
Early Learning Centers
Emergency Services:

- Rent
- Utility
- Food Assistance

Head Start
Healthy Start
Help Me Grow Oklahoma
Housing Preservation
Housing Supportive Services:

- Credit Counseling
- Financial Capability
- Homebuyer Education
- Housing Counseling
- Home Equity Conversion Mortgage Counseling

Lending:

- Business
- Residential

Multi-Family Housing:

- Apartments
- Senior Supportive Housing (HUD 202)

Retired Senior Volunteer Program

Rx for Oklahoma

Safe Place Healing Hearts Program

Second Chance Adult Re-entry

Self-Help Housing

Technical & Management Assistance

Tourism:

- Clayton Lake State Park
- Hugo Lake Park
- Raymond Gary State Park

Transportation:

- Local, in-demand
- Sooner-Ride (non emergency medical transportation)

Tri-County Opioid Response Project

Victim Advocacy Services

Volunteer Income Tax Preparation

Weatherization

YouthBuild



2024 ROMA LOGIC MODEL

☒ Family ☒ Community ☐ Agency

LIFT Community Action Agency, Inc.

Program: Housing

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our Community has a need for increased safe, decent and affordable housing	LIFT WX Crew Conduct Weatherization activities on homes in 12-county region	Increased safe, decent and affordable homes for families of low-income	By 12/31/2024, 70 of 80 homes (87.5%) will be weatherized for families of low-income creating safer, more energy efficient homes.	65% as of 10/1	Number of homes weatherized	WX program Director will maintain a database online with applications/work performed, etc. Additionally, files will be created and maintained for each family by the WX PD.	Data will be reported to the Board annually via the updated logic models which reflect the actual results achieved.
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	

☒ Family ☒ Community ☐ Agency

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

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

2024 ROMA LOGIC MODEL

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LIFT Community Action Agency, Inc.

Program: Substance Use and Abuse

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our community has a need for additional substance use/abuse resources, supportive services and treatment options.	LIFT CAA RCORPs Program Director will complete all phases of the certificaion process to become a CCARC i.e. developing policies/procedures and other needs such as referral services and other infrastructure development	Increased case management, PRRS for those suffering from Substance/Use Abuse through referrals, linkages, etc.	By 08/31/2024, 1 of 1 (100%) certifications will be acquired by LIFT CAA as a Comprehensive Community Addiction Recovery Center	100%	Number of Certifications received	RCORPs PD will self report that she has successfully completed all phases required by the ODMHSAS to achieve the requirements of certification. Permit for temporary operation issued	Data will be reported to the Board annually via the udated logic models which reflect the actual results achieved.
					☐ Family ☒ Community ☐ Agency		
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	

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

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

2024 ROMA LOGIC MODEL							
LIFT Community Action Agency, Inc.					Program: Economic Development		
Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our community has a need for increased or expanded community and economic development activities to improve the local economy	LIFT CAA will secure resources and make improvements at Hugo Lake Park Cabins, Marina and Hospitality House	Improved economy via increased tourism activities	By 12/31/2024, 3 of 3 (100%) recreational facilities (2 cabins and 1 hospitality house) t Hugo Lake Park will be upgraded with new furnishings, flooring, bedding, etc.	75%	Increase cabin rentals by 10% from 2023 counts for numbers of days rented. Increase Hospitality House rentals by 5% from 2023 counts for number of days rented	HLP manager will use reservation database to track numbers of rentals, nights rented, etc. for cabins at Hugo Lake Park and for the Hospitality House.	Data will be reported to the Board annually via the upated logic models which reflect the actual results achieved.
					☐ Family ☐ Community ☒ Agency		
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency						Proxy Outcome:	
*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.							
ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project							

2024 ROMA LOGIC MODEL

LIFT Community Action Agency, Inc.					Program: Agency		
Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measurement Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our agency has a need to increase staff capacity to better meet the needs of our clients and community.	LIFT CAA staff (Program Directors, Leadership, Front Line) will attend leadership trainings, etc to learn best practices, etc.	Increased employee capacity resulting in enhanced service provision for those we serve	By 12/31/2024, 10 of 10 (100%) staff (Leadership, Front Line) will attend 4 capacity building trainings. 15 of 20 (75%) PD's will attend 4 Program Director Quarterly meetings	100%	Number of staff and number of trainings attended	HR records; self-reporting; Sign-in Sheets; Certifications achieved. ROMA Coordinator will collect information from staff on what trainings were attended; when attended; who attended and types of training and/or certifications obtained/achieved.	Data will be reported to the Board annually via the updated logic models which reflect the actual results achieved.
Mission: To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency					Proxy Outcome:		
*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.							
ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project							

Total Reported Investment	\$4,800,120.82
Homeowners Created - Customers	17
Preserved Homeownership - Customers	6
Rental Homes Constructed, Acquired, and Preserved	0
Created and Preserved Homes and Customers	23
Owner Occupied Repairs - Homes	15
Rental Homes, Repaired	0
Total Repaired - Homes	15
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	0
Foreclosure Mitigation Counseling Intake - Customers	0
Rental Homes Portfolio, Owned and/or Managed	131



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

Quarterly Production Summary Report

July 1 - September 30 2024

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	\$0.00	\$0.00	\$796,501.67	\$595,904.00	\$1,903,493.58	\$3,295,899.25
Homes	0	0	4	5	8	17
Customers	0	0	4	5	8	17
	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	\$45,667.57	\$0.00	\$0.00	\$0.00	\$0.00	\$45,667.57
Homes	6	0	0	0	0	6
Customers	6	0	0	0	0	6

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	\$18,172.00	\$1,390,902.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35,269.00	\$0.00	\$14,211.00	\$0.00
Homes	15	* 9	0	0	0	0					

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

Quarterly Production Summary Report

July 1 - September 30 2024

8251 - LIFT Community Action Agency

Midwest Region

III. Rental Homes Portfolio	
a. Owned	131
b. Managed not Owned	0
c. Number of units covered by project-based rental assistance program	0
d. Number of units covered by tenant-based rental assistance program	64

IV. Commercial Development Portfolio	
Number of Projects	0
Square Footage	0
Shared Equity and Cooperative Housing Portfolio	
Community Land Trust	0
Deed-Restricted Homeownership	0
Limited Equity Cooperative	0

V. Group Education Customers	
a. Completed financial literacy workshop; including home affordability; budgeting and understanding use of credit	0
b. Completed predatory lending; loan scam or other fraud prevention workshop	0
c. Completed fair housing workshop	0
d. Completed homelessness prevention workshop	0
e. Completed rental workshop	0
f. Completed pre-purchase homebuyer education workshop	0
g. Completed non-delinquency post-purchase workshop; including home maintenance and/or financial management for homeowners	0
h. Completed resolving or preventing mortgage delinquency workshop	0
i. Completed disaster preparedness assistance workshop	0
j. Completed disaster recovery assistance workshop	0
Total Group Education	0

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

VII. Revolving Loan Fund (RLF), Excluding Forgivable and Deferred

First Mortgages		Subordinate Mortgages		Revolving Loan Fund (RLF), Non Amortized	
a. Total outstanding number of RLF loans	6	j. Total outstanding number of RLF loans	0	a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total outstanding value RLF loans	\$327,922.00	k. Total outstanding value of RLF loans	\$0.00	b. Total value of outstanding non-amortized loans (excluding forgivable)	\$0.00
c. Number currently 30-59 days delinquent	0	l. Number currently 30-59 days delinquent	0		
d. Value currently 30-59 days delinquent	\$0.00	m. Value currently 30-59 days delinquent	\$0.00		
e. Number currently 60-89 days delinquent	1	n. Number currently 60-89 days delinquent	0		
f. Value currently 60-89 days delinquent	\$139,438.00	o. Value currently 60-89 days delinquent	\$0.00		
g. Number currently 90 days or more delinquent	1	p. Number currently 90 days or more delinquent	0		
h. Value currently 90 days or more delinquent	\$15,543.00	q. Value currently 90 days or more delinquent	\$0.00		
i. Delinquency Rate (90 days or more)	4.74 %	i. Delinquency Rate (90 days or more)	0.00 %		

IX. Home Ownership Customers: Education and Counseling Hours

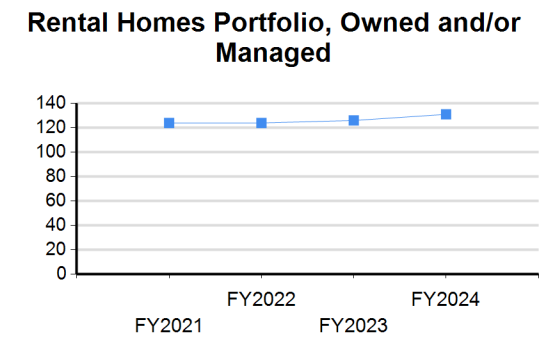
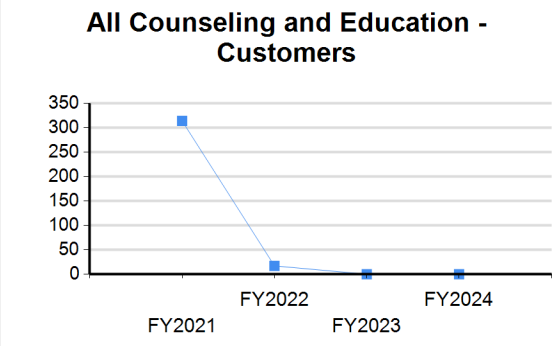
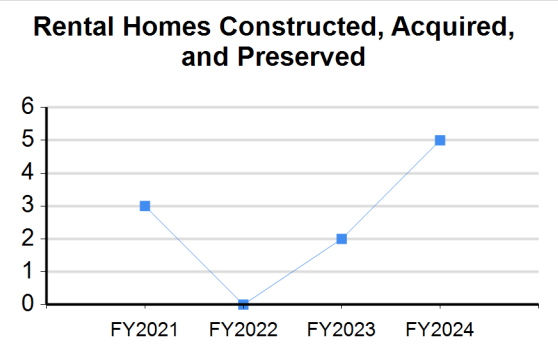
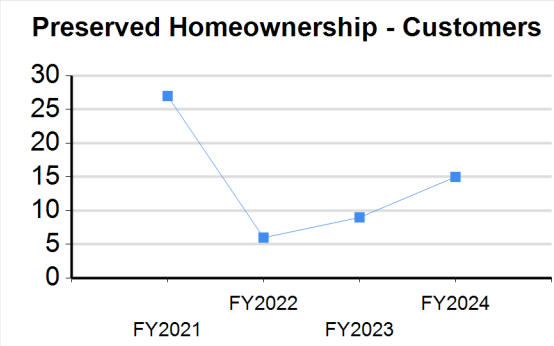
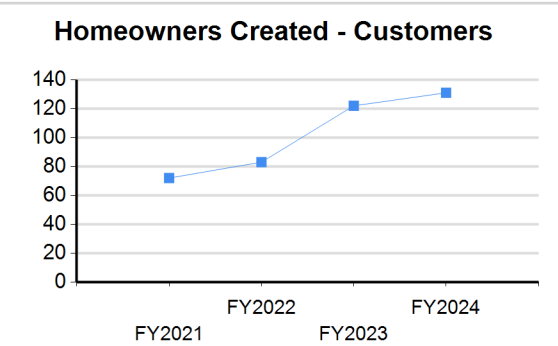
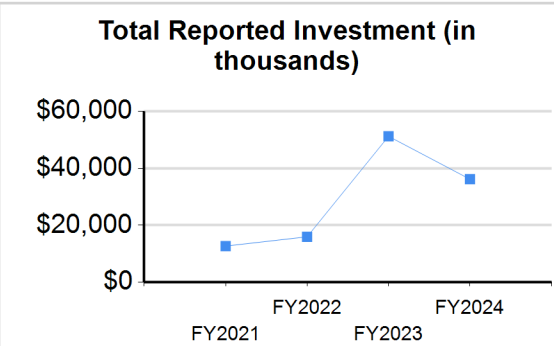
0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	17	100.00 %

YTD Production Summary Report
October 1 - September 30 2024

8251 - LIFT Community Action Agency
Midwest Region

Total Reported Investment	\$36,166,689.09
Homeowners Created - Customers	131
Preserved Homeownership - Customers	15
Rental Homes Constructed, Acquired, and Preserved	5
Created and Preserved Homes and Customers	151
Owner Occupied Repairs - Homes	64
Rental Homes, Repaired	0
Total Repaired - Homes	64
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	0
Foreclosure Mitigation Counseling Intake - Customers	0
Rental Homes Portfolio, Owned and/or Managed	131

Production Goals	FY 2023 Projections	FY 2024 Projections
Homeownership Promotion Clients	70	90
Homeownership Preservation Clients	10	40
Rental Units Developed	5	5
Rental Units Preserved	0	0



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

YTD Production Summary Report
October 1 - September 30 2024

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	\$0.00	\$0.00	\$1,629,014.67	\$6,474,254.39	\$20,971,368.16	\$29,074,637.22
Homes	0	0	8	40	83	131
Customers	0	0	8	40	83	131
	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	\$90,387.87	\$0.00	\$0.00	\$0.00	\$0.00	\$90,387.87
Homes	15	0	0	0	0	15
Customers	15	0	0	0	0	15

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	\$59,262.00	\$6,315,444.00	\$0.00	\$543,742.00	\$0.00	\$0.00	\$0.00	\$61,060.00	\$0.00	\$22,156.00	\$0.00
Homes	64	* 37	0	5	0	0					

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

YTD Production Summary Report

October 1 - September 30 2024

8251 - LIFT Community Action Agency

Midwest Region

III. Rental Homes Portfolio	
a. Owned	131
b. Managed not Owned	0
c. Number of units covered by project-based rental assistance program	0
d. Number of units covered by tenant-based rental assistance program	64

IV. Commercial Development Portfolio	
Number of Projects	0
Square Footage	0
Shared Equity and Cooperative Housing Portfolio	
Community Land Trust	0
Deed-Restricted Homeownership	0
Limited Equity Cooperative	0

V. Group Education Customers	
a. Completed financial literacy workshop; including home affordability; budgeting and understanding use of credit	0
b. Completed predatory lending; loan scam or other fraud prevention workshop	0
c. Completed fair housing workshop	0
d. Completed homelessness prevention workshop	0
e. Completed rental workshop	0
f. Completed pre-purchase homebuyer education workshop	0
g. Completed non-delinquency post-purchase workshop; including home maintenance and/or financial management for homeowners	0
h. Completed resolving or preventing mortgage delinquency workshop	0
i. Completed disaster preparedness assistance workshop	0
j. Completed disaster recovery assistance workshop	0
Total Group Education	0

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

VII. Revolving Loan Fund (RLF), Excluding Forgivable and Deferred

First Mortgages		Subordinate Mortgages		Revolving Loan Fund (RLF), Non Amortized	
a. Total outstanding number of RLF loans	6	j. Total outstanding number of RLF loans	0	a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total outstanding value RLF loans	\$327,922.00	k. Total outstanding value of RLF loans	\$0.00	b. Total value of outstanding non-amortized loans (excluding forgivable)	\$0.00
c. Number currently 30-59 days delinquent	0	l. Number currently 30-59 days delinquent	0		
d. Value currently 30-59 days delinquent	\$0.00	m. Value currently 30-59 days delinquent	\$0.00		
e. Number currently 60-89 days delinquent	1	n. Number currently 60-89 days delinquent	0		
f. Value currently 60-89 days delinquent	\$139,438.00	o. Value currently 60-89 days delinquent	\$0.00		
g. Number currently 90 days or more delinquent	1	p. Number currently 90 days or more delinquent	0		
h. Value currently 90 days or more delinquent	\$15,543.00	q. Value currently 90 days or more delinquent	\$0.00		
i. Delinquency Rate (90 days or more)	4.74 %	i. Delinquency Rate (90 days or more)	0.00 %		

VIII. Inventory For-Sale / Days on the Market

Inventory For-Sale Homes		Days on the Market for For-Sale Homes in Inventory	
Units Held in Portfolio at End of Quarter	0	For sale less than 120 days	0
Units moved to rental portfolio or lease purchase program	0	For sale between 120-180 days	0
# of Unimproved Owned Buildings	0	For sale greater than 180 days	0
# of Owned Undeveloped Lot	0		
# of Units Under Construction	0		
# of Units Sold	0		

X. Home Ownership Customers: Education and Counseling Hours

0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	131	100.00 %

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

October 15, 2024
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, October 15, 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 met, members present were, Brittany Ransom; Antlers, Blanca Jimenez; Forest Grove II, Key'Osha Jones; Horace Mann III, Savannah Hughes; Rattan II & III, Kara Hoff; Soper I, Angel Rayburn; Soper II, Bessi Black and Kara Maness; Community Representatives.

HS/EHS/EHS-CC staff present included: 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, 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; ERSEA Assistant, Christina Merritt; FCE Specialist, Ashley Stinson; Disability/Mental Health Specialist, Tori Williams; Health Specialist, Ashley Gaddy; Outreach Specialist, Lisa Hady Mentor Coach and Sheree Ensley; LIFT, CAA Fiscal Officer/Accounting Supervisor.

Consideration, Discussion and Vote to Accept the minutes from the September 17, 2024 Meeting: Copies of the minutes were provided to the council for review. Bessi Black made a motion to approve as written the September 17, 2024 minutes as written and Kara Maness seconded the motion, the motion carried.

Consideration and Vote to approve the 2024-2025 Community Representatives: Kara Maness and Consuelo Splawn- LIFT Board Member, Clinton Crawley-Washington Community Center, Bessi Black- Choctaw County Library and Patsy Guess- Kiamichi Technology Center. Jordan Mack explained the roles and responsibilities of the Community Representatives and asked for a motion to approve them all. Mike Morris made a motion to approve and Savannah Hughes seconded the motion. The motion carried.

Presentation and review of LIFT, CC Audit for the Years Ended December 21, 2023 and 2022; Sheree Ensley: Sheree Ensley, Fiscal Officer/Accounting Supervisor presented the years ended December 21, 2023 and 2022 Agency Audit along with a brief overview and stated there were no weaknesses and the one finding has already been corrected. Mrs. Ensley stated that the audit is completed annually and is available for public viewing on the agency's website.

Consideration, Discussion, and Vote to Enter into Executive Session to Discuss the employment, transfer, hiring, appointment, promotion, demotion or disciplining of employees: Shakitria Hunter-Idabel EHS Caregiver, Jana Autry-Antlers EHS Cook, Destiny Gaffney-Substitute, Sarah Rogers-Substitute, Shelbie Reese-Substitute, Cheyenne Jones-Substitute, Christina Merritt from Disability/Mental Health/FCE Assistant to Family Community Engagement Specialist, Jessica Broadrick from, Horace Mann II Teacher Assistant to Horace Mann I Teacher Assistant, and Tieannie Abel-Lehmann from

Special Needs Aide to Horace Mann II Teacher Assistant, pursuant LIFT, CAA Okla. Stat. title 25§ 307 (b) (1). No motion was made, therefore no executive session

Consideration, Discussion, and Vote to Adjourn Out of the Executive Session and the Regular Board Meeting Be Reconvened. Did not enter into Executive Session, therefore no vote was needed.

Consideration, Discussion and Vote to Approve New Hires, Transfers and Terminations Recommended by the Personnel Committee. Kara Maness made a motion to approve and Savannah Hughes seconded the motion. The motion carried.

Consideration, Discussion, and Vote to Approve the Acceptance of the SFY 2025 Community Action Agencies State Appropriated Funds for Head Start Award from Oklahoma Dept. Of Commerce-\$91,962: Jordan Mack, HS/EHS/EHS-CC Assistant Director explained to the council that these funds are a supplement grant for the program and go toward Head Start Teacher and Family Advocate Salaries. Brittany Ransom made a motion to accept and Key'Osha Jones seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve Head Start/Early Head Start/EHS-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy: Mattie McKee, HS/EHS/EHS-CC Assistant Director provided copies and reviewed with the Policy Council the Operating Procedures; the purpose is serving as a link to parents, grantees, public and private organizations and the communities served; the membership, as representatives of Head Start families and as community representatives; offices duties, including Chairperson, Vice-Chairperson, and Secretary; committees, such as Parent Committees, Grievance Committees, and special committees as needed. Mattie McKee also explained that the Impasse Policy is a conflict resolution policy between the Policy Council and the Governing Board. Key'Osha Jones made a motion to approve and Bessi Black seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve the updated Integrated Services Policies & Procedures (changes made due to the Head Start Program Performance Standards-August, 2024): Jordan Mack, HS/EHS/EHS-CC Assistant Director explained that there had been changes made to the Head Start Performance Standards and that the first round of changes will go into effect October 21, 2024. Each of the HS/EHS/EHS-CC Specialists presented the changes to their plans on how HS/EHS/EHS-CC will comply with the changes. Kara Maness made a motion to approve and Bessi Black seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve LIFT Head Start Policy Council Regular Meeting Dates for 2024-2025: Jordan Mack, explained to the council that the LIFT Governing Board meets on the 2nd Tuesday of each month, and that HS/EHS/EHS-CC Policy Council has always met the following Tuesday (3rd Tuesday) of each month. After reviewing and discussing the 2024-2025 Calendars a motion was made by Bessi Black to keep the Policy Council meeting dates/times as presented, Angel Rayburn seconded the motion. The motion carried.

Consideration, Discussion and Vote to Approve the HS, EHS, SAF, Community Facilities, OECP, USDA, and Non-Fed August, 2024 Financial Statements and Credit Card Distribution Reports: Jordan Mack, HS/EHS/EHS-CC Assistant Director provided copies and an overview of the August, 2024 financial statements and Credit Card Distribution Report for the Council and it was reviewed and they were recommended by the Finance Committee to vote for approval. Kara Maness made a motion to recommend for full Policy Council approval and Key'Osha Jones seconded the motion. The motion carried.

Presentation of September, 2024 Financial Statements and Credit Card Distribution Reports for November Consideration and Vote: Jordan Mack, HS/EHS/EHS-CC Assistant Director presented the September, 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 November 19, 2024 meeting. Copies will be mailed to members not present.

Policy Council Training and Recognizing and Reporting Child Abuse: Christina Merritt, FCE Specialist, formally Disability/Mental Health Assistant presented and video and discussion on Reporting Child Abuse. Mrs. Merritt also stated that every new employee that is hired goes through a child abuse and prevention training, in which they are trained to recognize the different signs of child abuse. New staff are also trained on the importance of being a mandated reporter when it comes to any suspected child abuse, as well as the programs procedures for when a report is made.

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey reported that as of today, 10/15/2024 265 children are currently enrolled in Head Start, attendance for August, 2024 was 92.2%. Early Head Start currently has 46 children enrolled and attendance for August, 2024 was 80.3%. Early Head Start-CC currently has 109 children enrolled and attendance for August, 2024 was 89.6%.

USDA Meals and Snack Report-Lauren Barger, Lauren Barger, Nutrition Specialist provided a copy and an overview summary of meals and snacks served for September, 2024.

Governing Board Report: Mattie McKee- Mattie McKee, HS/EHS/EHS-CC Assistant Director stated that the Governing Board Met on October 8, 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 August, 2024

OHS Communications and Guidance-Jordan Mack presented and reviewed all OHS Communications and Guidance received since the last council meeting.

Program Summary Report-Jordan Mack presented the HS/EHS/EHS-CC Program Summary for the council to review.

Training: Program Information Report (PIR) HS/EHS/EHS-CC: Mattie McKee, HS/EHS/EHS-CC Assistant Director stated that the Program Information Report (PIR) provides comprehensive data on the services, staff, children and families, including program, characteristics including data on physical health, mental health, disabilities, and family services served by HS/EHS programs nationwide. All grants and delegates are required to submit the PIR for both Head Start and Early Head Start programs. The PIR is an important source of descriptive and service data for the Head Start community, their partners, congress, and the general public. PIR data is compiled for use at the federal, regional, state and local level.

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 not any.

There being no other business to come before the board, Brittany Ransom made a motion to adjourn and Angel Rayburn seconded the motion. The motion carried and the meeting ended at 11:51 a.m.

Michael Morris-Chairperson

Mea Janse van Vuuren-Vice-Chairperson

Key'Osha Jones-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: 10/04/2024

Name of Person being nominated for Employee of the Month: Owyne Gardner

Name of Person submitting the nomination: Pam Price

- X Is a hard worker She does not quit until the job is done.
- X Respects others _____
- X Is on time Always arrives early!
- X Is organized She may not always look like it--but she can find it!
- X Keeps a positive attitude Even on the hard days--she keeps digging to get things done
- X Encourages other people She will say--Yes you can!
- X Is willing to help others Willing to help all programs within our HOC
- X Makes a good first impression She has a "wit" that just makes you laugh!
- X Follows all workplace rules _____
- X Uses resources wisely Always refers back to guidance for answers.
- X Has good work attendance Rarely misses work
- X Represents the agency well _____
- X Is a loyal employee Yes for ALOT of years.
- X Handles crisis well _____
- X Goes above and beyond the call of duty Will do whatever needs to be done.
- X Works well with others (team player) _____



_____	Is creative	_____
_____	Likes to learn new things	_____
X	Is a good listener	_____
X	Communicates well	_____
X	Dependable	Rarely misses and if she says she will do it--she will
X	Respectful, considerate of others	_____
X	Safety conscious	_____
X	Good problem solving skills	Very good at thinking outside the box
_____	Other	_____
_____	Other	_____
_____	Other	_____

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

Owyne Gardner is Program Director for the T&MA Contractor program. I could write you a book about Owyne, but I will summarize. Owyne is an employee you would like to duplicate. She has a strong work ethic that shows in every action. Owyne is a great resource for the T&MA program, to staff as well as to all of our grantees. She is a person that will find a way to complete any and all tasks. She is willing and does assist all programs in our HOC building. Owyne is dependable and loyal to our agency and goes above and beyond to get the job done AND has done so for A LOT of years. To some she is Owyne, some call her Ms. Gnat and to some she is Granny O, but to T&MA Contractor staff, Owyne is our fearless leader. We are thankful to have her. Because of all of the above, I nominate Owyne Gardner as Employee of the Month

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
October 2024

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of October there were 46 children, age birth to 3, that were provided services in the Early Head Start centers and 105 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 267 children, age 3 to 4 years old in the Head Start centers within the tri-county service area due to summer vacation.

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 September, we had 127 parents that participated in Parent Meetings. Family Advocates are starting goals with families through the Family Partnership Agreement's. The centers started inviting parents and community members in to participate in Parent Ready to Read by having a story time with the children; there were 82 participants, with 19 of them being father figures.

Father Involvement

The dad's day activities for the month of September were various tie-dye shirts, sun, and hand print crafts. For the September Dad's Day, there were 201 people that participated in dads day activities with 97 being father figures. In addition, 26 dads/father figures participated in parent meetings for August. Since the beginning of the 2024-2025 school year, we have had 273 father figures participate in family engagement activities.

Nutrition

For the month of October, the Nutrition team has been very busy. We started our 1st round of CACFP (Child and Adult- Care Food Program) kitchen checks, we were very pleased to find that there was no findings and all paperwork was up to date and completed accordingly. The Nutrition team also completed our 1st semester Head Start folder checks where we insure that all food allergies and CACFP documents are up to date in our child folders. The nutrition team also sent out BMI letters to parents based on children's physicals.

Health

During the month of October employee Physical tracking continued. ELCCT meeting was held. Most folder checks were completed for HS. We have continued to receive updates for Child Plus

immunizations and Physicals received from centers for entry into Child Plus. One CPR classes was held in October. HS centers were updated on requirements regarding physicals and immunizations due and coming due. Of the 267 children that is currently enrolled in head start only 2 need hearing/vision screens and these are new students. 65 dentals are need out of the 267, 48 physicals are needed. 16 children need immunizations. EHS & ELC-CC are ongoing with their health screens and are looking good as well. Stay Healthy, Wash your hands!

Education

This month, we completed the first round of folder checks for Head Start. While checking the children's folder, we look to make sure the children have been screened and any follow-ups with that process. Looking at Individual Development Plans (IDP Goals) is necessary to make sure that the children have goals to accomplish and check with the teacher on the progress of meeting these goals. Home Visits and Parent Teacher Conferences should be documented and placed into the Child Plus online app. This is a tracking system that enables us to keep information that is pertinent to the children. TSGOLD or Smart Teach is the observation assessment tool that can give information on the children's developmental progress. This information is compiled to help gain insight into how we can develop teaching and further the child's development.

Professional Development

During the month of October, the Professional Development Specialist scheduled CPR/First Aid classes taught by LIFT CPR Instructors Tori Williams/Taryn Creasman/Ronda Spear, where several LIFT employees received or renewed their Adult and Infant CPR and First Aid certifications. The Professional Development Specialist also scheduled an ELCCT class in which three newly hired LIFT employees participated.

Professional Development Ladders and Oklahoma Directors Credentials were renewed or received for several employees in October.

In October, the Professional Development Specialist facilitated in-service held at the Hugo Kiamichi Technology Center for Head Start/Early Head Start/Early Head Start – Child-Care staff. Seth Kastner from the Oklahoma Autism Center presented a very informative autism spectrum disorder presentation. Mr. Kastner also gave the staff some useful tips and tools on how to engage children with suspected autism during his training. The October in-service covered various topics such as the Strategic Plan, required annual CACFP Civil Rights and Child Abuse Awareness training. Steven Lacy from Oklahoma DHS presented the Child Abuse Awareness training this year.

The Professional Development Specialist has been busy ensuring that all staff members are on track to meet any education requirements in the proper timeframe. Staff members have been making progress and are on track to be completed within requirement deadlines.

We have been working to ensure all new staff meet requirements for the programs they work for including trainings as well. We strive for excellence and want to make staff as well seasoned and informed as possible.

Disabilities/Mental Health/Transition

Sooner Start has an online process for referrals that goes directly to the Oklahoma State Department of Education. This process has streamlined the referral process. In Early Head Start, two children 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 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

The following recruitment and outreach strategies/activities were implemented or held during the month of October 2024.

Oklahoma Family Network Southeast Region Resource Guide

- Our Head Start, Early Head Start and Early Head Start Child Care programs, along with our Family Resource Center, were added to their resource guide. This furthers our reach in our state and allows for more families and programs to learn about our services.

LIFT Healthy Start Training

- The Outreach Specialist had the opportunity to speak with the Healthy Start Care Coordinators regarding our HS/EHS/EHS-CC programs and our Family Resource Center. The care coordinators serve pregnant women and children up to 18 months and help connect them to programs in our community. We also discussed the application process and how they can help their families when completing an application.

Red B Menus

- Red B called and requested more kid menus. Providing kid menus to loca restaurants allows us to continuously market our program in that area. Red B is a popular restaurant among families in the Idabel area.



Outreach through Community Events

- We provided customized candy to our local community events to be passed out during trick-or-treating in Antlers, Hugo, Idabel and Rattan.



Radio Ad:

- *Attention: Choctaw, McCurtain and Pushmataha Counties! FALL has officially arrived! Don't delay, submit your PRE-SCHOOL application, today! We are still accepting applications for Head Start, Early Head Start or Early Head Start-Child Care. Our mission 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 absolutely 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*

High School Football Programs

- For the 2024 football season, our flyer/information is included in the Antlers, Valliant, and Idabel High School football programs, every week that they have a home game.

Community Partner Meetings

- Outreach Specialist attends coalition meetings to promote HS/EHS/CC program and to also learn about events and resources in our community.

Help Me Grow Newsletter



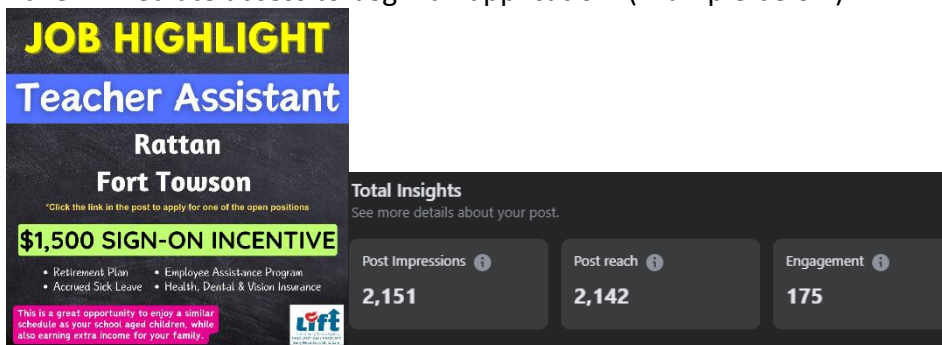
Social Media Classroom Highlights

- We have continued to share classroom highlights on our social media to further engage parents, highlight the amazing work being done in our classrooms, give possible applicants a glimpse into the classroom to encourage them to complete an application for their child and provide them with an early education experience. (Example below)



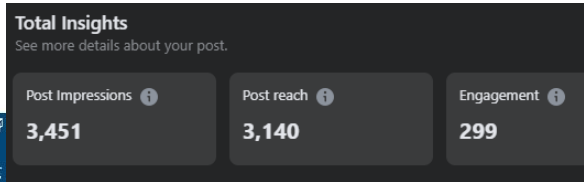
Social Media Job Highlights

- Every week we highlight an open position and ask our followers to please share on their news feed. This allows us to put a focus on each position and share all the open positions we have available. A direct link to an application is provided on each post for applicants to have immediate access to begin an application. (Example below)



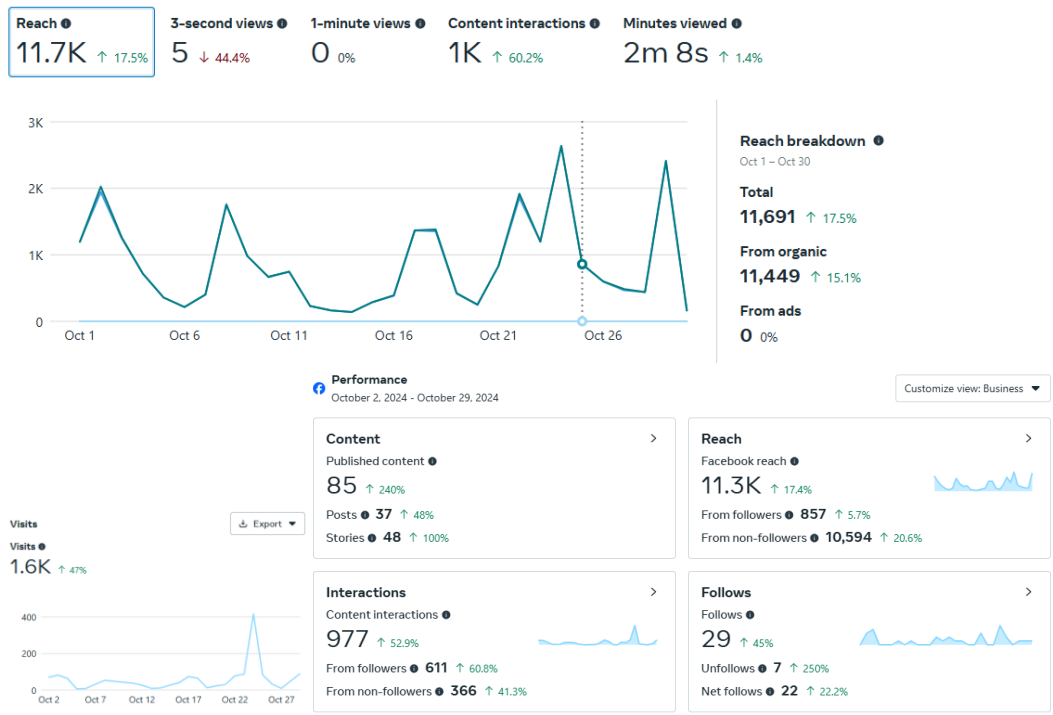
Social Media Boost at October In-Service

- We held our October In-service for HS/EHS/EHS-CC and asked all attendees to please share a specific post on Facebook promoting our Head Start programs. The post had over 160 shares and has been shared between all three counties we serve: Choctaw, McCurtain and Pushmataha Counties. This allows us to blast our three counties and bring families to our Facebook page and learn about our services. The post also has a direct link to our online application.



Overall Facebook Data

- Analyzing our Facebook data each month allows us to see how many people are visiting our page, what kind of content gets the most shares, likes and comments, and how we can improve moving forward.



Family Resource Center

- Our Family Resource Center has been fully implemented and we are officially accepting families. We are currently planning our first training to offer to the community, and forming our Parent Advisory Committee and Community Partnership Council.



Explore content posted to the [Early Childhood Learning and Knowledge Center \(ECLKC\)](#) throughout the month of October. These email announcements and resources are helpful for Head Start 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-24-04 Facilities Guidance](#)
 - Available in [Spanish \(español\)](#)
- [ACF-OHS-PI-24-06 Final Rule on Supporting the Head Start Workforce and Consistent Quality Programming – Technical Updates](#)
- [ACF Announces 2024–2025 National Head Start Fellows](#)
 - Available in [Spanish \(español\)](#)
- [Child Health and Safety Resources Spotlight](#) (email)
 - Available in [Spanish \(español\)](#)
- [Detailed Summary of Updates to the Performance Standards](#)
- [Director Garvin Discusses Supplemental Funding for Building a Culture of Safety](#) (email)
- [Director Garvin Highlights Child Health and Safety Changes in the Performance Standards](#) (video)
- [Forecasted Notice of Funding Opportunity for Dissertation Research](#) (email)
- [Making the Transition to HeadStart.gov](#)
 - [Digital Toolkit](#)
 - [FAQs](#)
- [Head Start Program Facts: Fiscal Year 2023](#)
- [Hurricane Helene Emergency Response Resources](#) (email)
- [Nurturing the Head Start Promise](#) (email)
 - Available in [Spanish \(español\)](#)
- [Workforce Policies in the Updated Head Start Program Performance Standards](#) (video)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- [Advancing Equity Through Development, Teaching, and Learning](#) (email)
 - Available in [Spanish \(español\)](#)
- [Creating Inclusive Play Environments for Infants and Toddlers](#)
- [Developing Strategies to Restore Calm for Adults](#) (video)
- [Dual Language Learners with Disabilities or Suspected Delays](#)
- [Plan, Observe, Tinker, and Teach with Infants and Toddlers](#) (video)
- [Play the Head Start Way](#)
 - [Nature Walk and Roll](#)
 - [1-2-3 Dance with Me](#)
 - [It's Make-believable](#)
 - [We're Going on a Bug Hunt](#)
- [Revised Framework for Effective Practice](#) (email)

Health, Behavioral Health, and Safety

- [Advancing Equity Through Health, Mental Health, and Nutrition](#) (email)
 - Available in [Spanish \(español\)](#)
- [Helping Children, Families, and Communities Cope with Grief](#) (video)
- [Steps to Take if There Is Lead in Your Drinking Water](#)

Parent, Family, and Community Engagement

- [Advancing Equity Through Parent, Family, and Community Engagement](#) (email)

- Available in [Spanish \(español\)](#)

Program Management and Fiscal Operations

- [Advancing Equity Through Program Management](#) (email)
 - Available in [Spanish \(español\)](#)

Newsletters

- [Disabilities Services Newsletter Issue No. 84](#)
 - [Play the Head Start Way Newsletter Issue No. 6](#)
 - [Resources to Make You Smile! Issue No. 44](#)
 - Available in [Spanish \(español\)](#)
 - [Sesame Street in Communities Issue No. 37](#)
- [Subscribe now](#)** to get all your favorite newsletters direct to your inbox.

Head Start Careers

- [Early Childhood Director](#) Auburn, NY
- [Finance Director](#) Casa Grande, AZ
- [Site Supervisor](#) Wichita, KS

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

Upcoming Events for November

- Monday, Nov. 4: [The CDA Exam Experience: An Inside Look](#)
 - Presented in [Spanish \(español\)](#)
- Thursday, Nov. 7
 - [Promoting Safe Sleep Environments for Infants](#)
 - [Countering STEM Stereotypes About Identity and Gender](#)
 - [MyPeers Orientation for Program Leaders](#)
- Friday, Nov. 8: [Office of Head Start FY25 Monitoring Kickoff](#)
- Tuesday, Nov. 12
 - [Caring for Young Children with Type 1 Diabetes in Child Care](#)
 - [Tackle Behaviors That Challenge by Listening](#) (NHSA)
- Wednesday, Nov. 13: [Connecting with Diverse Families in the Home-based Setting](#)
- Thursday, Nov. 14
 - [Fall Garden Storytime](#) (NHSA)
 - [Winter Wellness: Nurturing Immune Health in Kids](#)
 - [Responding with Care to Infant and Toddler Behavior](#)
 - [Preventing Child Incidents Through Effective Systems](#)
- Tuesday, Nov. 19
 - [A Child-centered Approach to Toilet Learning Webinar](#)
 - [The Sound of Safety: Building Secure Bonds Through Shared Music Making](#) (NHSA)
 - [Spotlighting Urban Programs Serving McKinney-Vento–eligible Families](#)
 - [MyPeers Orientation for New Staff](#)
- Wednesday, Nov. 20
 - [A Child-centered Approach to Toilet Learning: Office Hour](#)
 - [Tools and Forms for Practice-Based Coaching](#)
- Thursday, Nov. 21: [The Sound of Safety: Building Secure Bonds Through Shared Music Making \[in Spanish\]](#) (NHSA)
- Monday, Nov. 25
 - [The Verification Visit Experience: An Inside Look](#)
 - Presented in [Spanish \(español\)](#)
 - [Infant and Early Childhood Mental Health Consultation National Office Hour](#)

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

Stay connected! Follow the Office of Head Start on [X](#), [Facebook](#), and [Instagram](#). Visit the [Family Room blog](#) to learn more about the activities of the Administration for Children and Families (ACF).

Office of Head Start (OHS) | 330 C Street, SW | 4th Floor Mary E. Switzer Building | Washington, DC 20201
 | <https://eclkc.ohs.acf.hhs.gov> | 1-866-763-6481 | [Contact Us](#)

MEALS SERVED TO CHILDREN IN HEAD START & EARLY HEAD START 12 Month Summary Report

Children that eat 2 meals and a snack at Head Start/ Early Head Start receives
1/2 to 2/3 of their daily nutritional needs.

Month	Breakfast	Lunch	Snack	Monthly Total
October-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
June-24	464	487	440	1391
July-24	660	710	637	2007
August-24	2483	2461	3082	8026
September-24	2981	2967	3874	9822
October-24	3074	3043	3757	9874
YEARLY TOTALS	30578	30425	38254	99257

September 2024 HEAD START TIME & ATTENDANCE REPORT													
As of 9/30/24	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	8	1	9	1		1	8	0		8		18	94.4%
Antlers 2			0			0	0	0		0			
Battiest	8		8		2	2	6	2	9/24/2024	8	1	16	81.7%
Boswell 1	8	4	12			0	12	0		12	5	16	88.9%
Boswell 2	8	4	12			0	12	0		12	5	16	89.2%
Broken Bow 1	8	3	11			0	11	0		11	2	20	92.9%
Broken Bow 3	10		10			0	10	0		10		20	90.5%
Clayton 1	8	1	9			0	9	0		9	2	19	90.1%
Clayton 2	7	1	8			0	8	0		8	2	19	98.0%
Forest Grove 1	17	1	18		3	3	15	3	9/23/2024	18	8	16	88.4%
Forest Grove 2	11		11			0	11	0		11	4	16	94.3%
Fort Towson	7	1	8			0	8	0		8	1	16	75.0%
Haworth	6	2	8			0	8	0		8	2	17	82.5%
Horace Mann 1	10		10		1	1	9	1	9/4/2024	10		18	91.5%
Horace Mann 2	16		16		1	1	15	1	9/27/2024	16	1	18	91.3%
Horace Mann 3	9	1	10			0	10	0		10	2	18	88.3%
Hugo 2	9	2	11	1		1	10	0		10		18	81.6%
Hugo 4	10	1	11	2		2	9	0		9	2	18	91.3%
Idabel 1	8		8			0	8	0		8		19	77.6%
Idabel 2	6	1	7			0	7	0		7		19	96.9%
Idabel 3	7	1	8			0	8	0		8		19	90.5%
Rattan 1	8	1	9			0	9	0		9	4	17	88.2%
Rattan 2	3		3			0	3	0		3	1	17	86.3%
Rattan 3	4		4	1		1	3	0		3		17	100.0%
Soper 1	14	3	17			0	17	0		17	9	16	94.8%
Soper 2	12		12	1		1	11	0		11	5	16	90.9%
Valliant 1			0			0	0	0		0			
Valliant 2	17		17	2		2	15	0		15	3	20	90.0%
TOTALS	239	28	267	8	7	15	252	7		259	59		89.6%

September 2024 Pre-K TIME & ATTENDANCE REPORT

As of 9/30/24	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			0			0	0		
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	3		3			0	3	16	100.0%
TOTALS	3	0	3	0	0	0	3		100.0%

September 2024 EHS Time and Attendance												
As of 9/30/24	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	24	4	28	3	1	4	24	1	1	9/9/2024	20	81.9%
Hugo	13	2	15	3		3	12		0		20	86.7%
Idabel	12	2	14	2		2	12	2	0		20	81.9%
TOTALS	49	8	57	8	1	9	48	3	1			83.1%

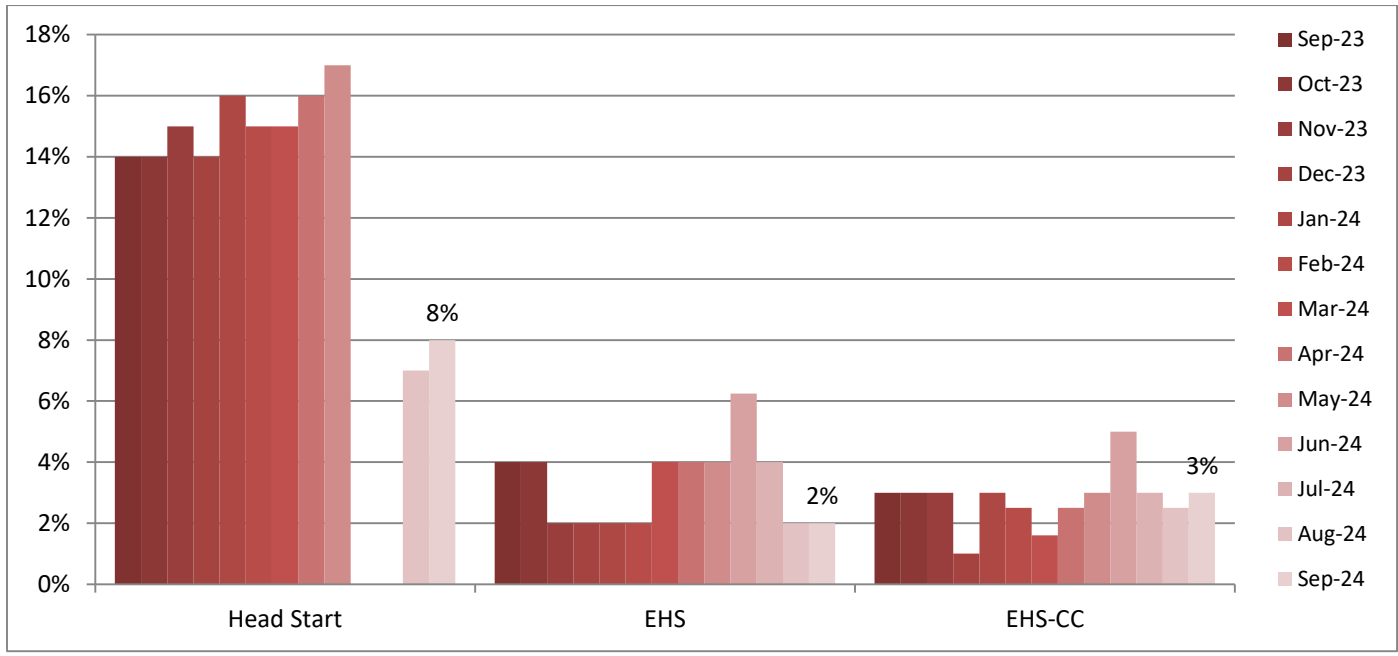
September 2024 EHS-CC Time and Attendance												
As of 9/30/24	ENROLLED			DROPPED								ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Dropped	Monthly Drop	YTD Drop	Currently Enrolled	AI	30 Day Count	Date Dropped	Kid Days	Monthly ADA
ELC-Antlers	9	1	10	2		2	8	1	0		20	89.7%
ELC-Broken Bow	16	1	17	2	1	3	14	1	1	9/13/2024	20	90.4%
ELC-Hugo	10		10	2		2	8		0		20	86.3%
ELC-Idabel	16	1	17	1		1	16	2	0		20	83.1%
Cabbage Patch	24	4	28	4	1	5	23	2	1	9/10/2024	20	94.7%
The LearningTree	42	10	52	9	4	13	39	1	4	9/16/2024	20	89.3%
TOTALS	117	17	134	20	6	26	108	7	6			89.4%

Data Analysis Report Summary

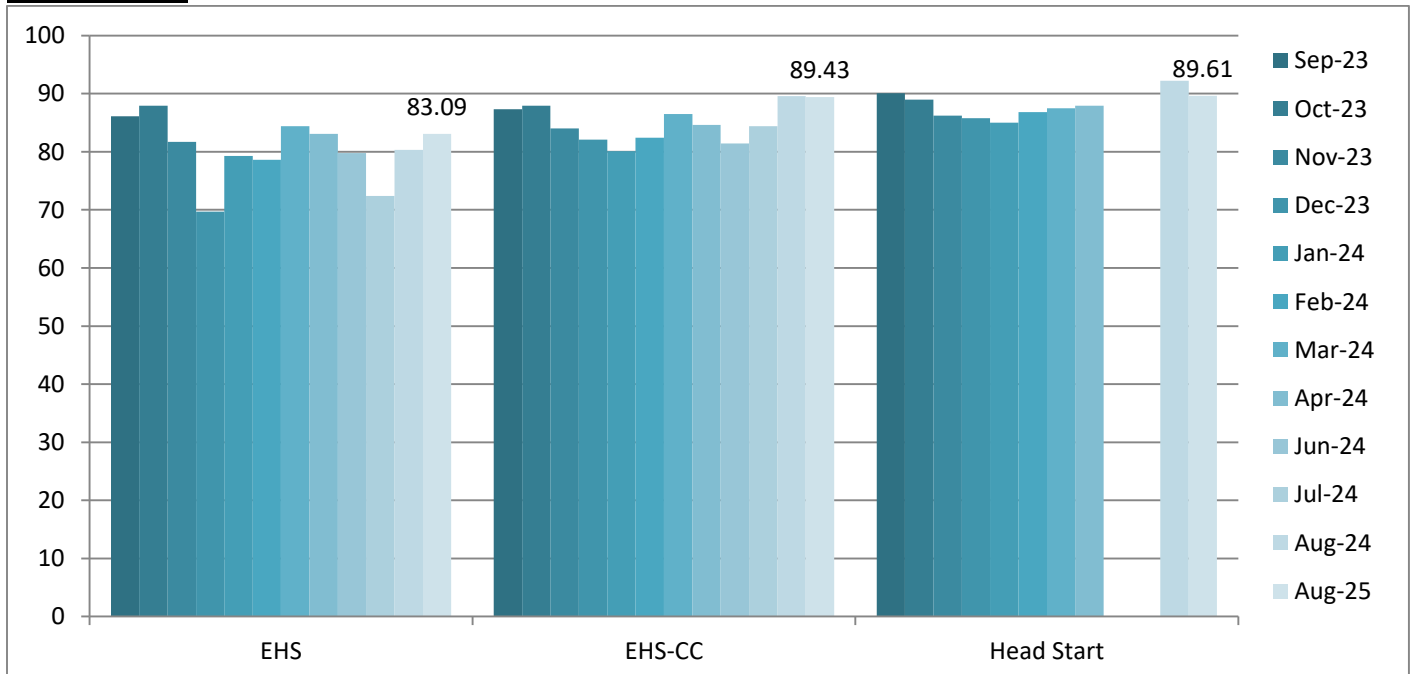
September 2024

Disabilities

IEP/IFSP –

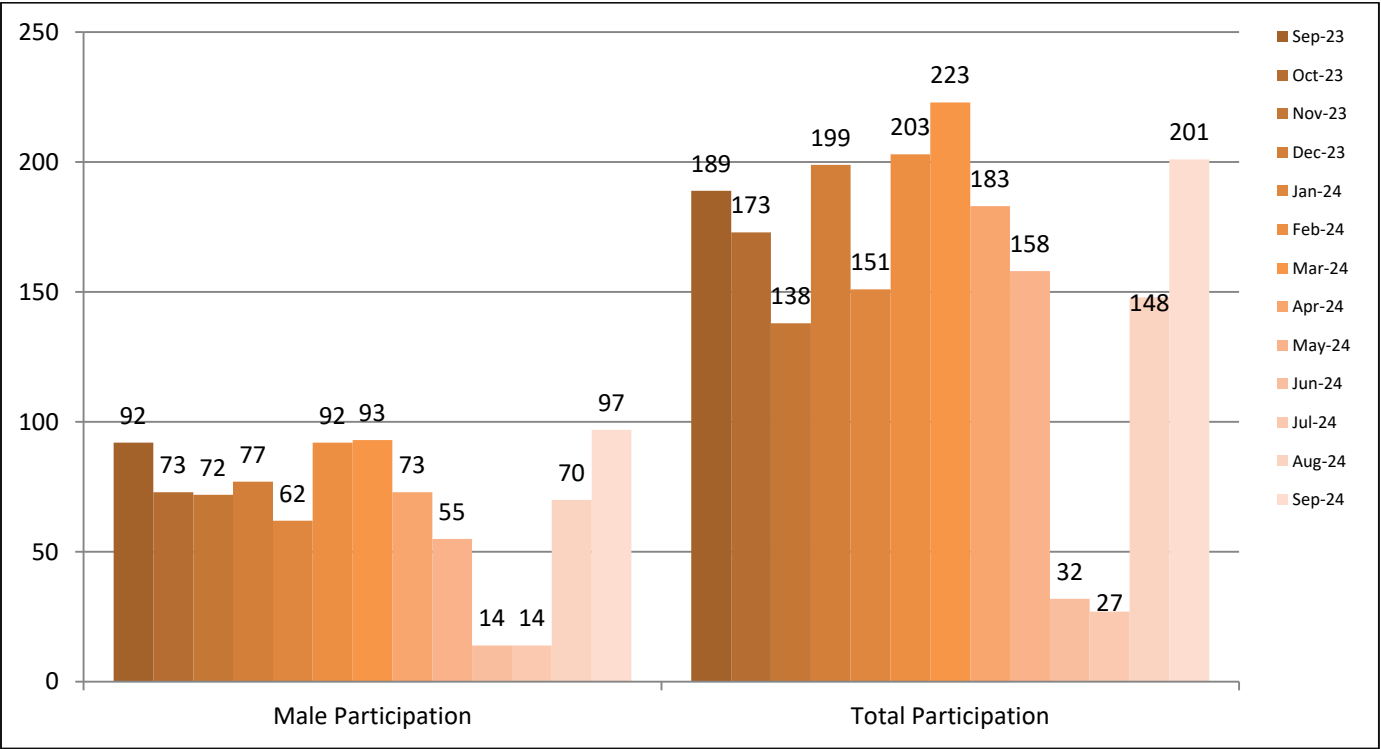


Attendance

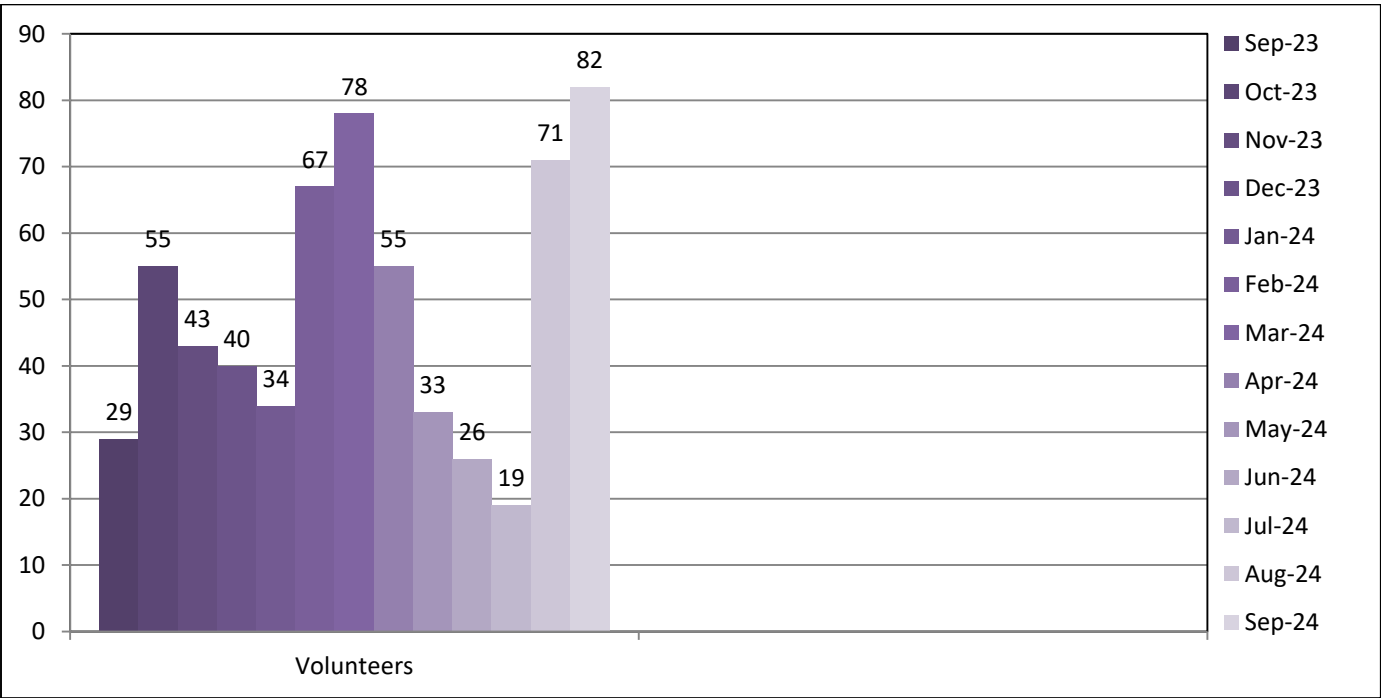


Family & Community Engagement

Dad’s Day



Parents Ready to Read





Community Action Agency
Family Resource Center



HELP US PREP OUR
FAMILY RESOURCE
CENTER

RESOURCE DRIVE

Helping people, changing lives!

While our primary focus is to connect families to important services and resources, we would like to be able to address any immediate household needs. We are accepting donations to stock our Family Resource Center with basic necessities to provide to our families on an as needed basis.

ITEMS NEEDED

- Diapers
- Wipes
- Pull-ups
- Toothpaste
- Dish soap
- Paper towels
- Body wash
- Toilet paper
- Toothbrushes
- Canned/dry food
- Shampoo/conditioner
- New Infant/Toddler/Pre-School Clothes & Socks

If you would like to donate, please feel free to drop off items at our LIFT Head Start Administration or you can also bring items to the next meeting. If you would like to arrange a pick-up, please contact Ashley Gaddy at 580-326-7581.

**For more information:
580-326-7581**

Family Resource Center Location:
Head Start Administration
1005 S 5TH ST Hugo, OK 74743

You are

INVITED TO ATTEND

AmeriCorps Seniors RSVP



THANKS FOR HELPING US GROW

13TH
NOV

**FIRST BAPTIST CHURCH
FELLOWSHIP HALL**

2:00-3:00
TIME

204 NORTHEAST B STREET IN ANTLERS
RSVP TO TRULA WALKER BY OCTOBER 31ST AT 580-298-2921
OR BY EMAIL TRULA.WALKER@LIFTCA.ORG



**AmeriCorps
Seniors**



You are

INVITED TO ATTEND

Americorps Seniors R&V



THANKS FOR HELPING US GROW

14TH
NOV

**FIRST UNITED METHODIST
CHURCH FELLOWSHIP HALL**

2:00-3:00
TIME

302 SE JEFFERSON STREET
IDABEL, OK 74745

RSVP TO TRULA WALKER BY OCTOBER 31ST AT 580-298-2921
OR BY EMAIL TRULA.WALKER@LIFTCA.ORG



AmeriCorps
Seniors

